Resource Mobilization for Civil Society Organizations in a Digital Context

Session #1

Financing with focus

2025

1. Introduction

This workshop, entitled "Focused Funding," is designed for leaders and business development staff at NGOs. The main objective is to teach participants how to create and use a "Strategy Screen," a simple and objective tool for deciding which funding opportunities to pursue.

The workshop addresses the common problem of spreading efforts and resources too thinly by trying to apply to every possible call for proposals, which often results in rushed, low-quality proposals.

The guiding principle is "do more with less," focusing energy on opportunities with the greatest potential for success and strategic alignment.

During the practical session, participants learn a three-step process to build their own screen:

1. Define between 5 and 7 key criteria for their organization (such as alignment with the mission, budget size, or probability of winning);
2. Assign a percentage weight to each criterion according to its importance; and
3. They create a scoring system to objectively evaluate each new opportunity.

By the end of the workshop, each person will have a first draft of their strategy screen and a clear plan to test, refine, and implement it within their team, turning it into a "living tool" that evolves with the organization.

Session 1 Script: Focused Funding (90 minutes)

Minute	Slide number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
0-5	1-4	Welcome participants and present objectives. Project Slide 1 (Title). "Welcome to 'Focused Financing.'" Use Slide 4 to read the objectives: "By the end of this session, participants will be able to..." Launch icebreaker: "In the chat, what is your biggest challenge when deciding whether to pursue a new opportunity?"	Purpose and benefits of a Strategy Screen.	Explanation + visual, Icebreaker activity.	When reading the objectives, reinforce how each one connects to the practical work the group will do today.

Minute	Slide number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
5-12	7	Explain the "Why": The Challenge. Use Slide 7 to talk about the challenges: "As we see in the image, do you often find yourselves in a tangled situation, chasing every opportunity and rushing through proposals?" Connect the icebreaker responses to the points on the slide.	Common challenges for CSOs: lack of time, dispersion of efforts.	Exposure, Contrast.	Use the image of the tangled ball of yarn (Slide 7) as a central metaphor for the problem to be solved.
12-20	8-9	Introduce the Strategy Screen as a solution. Project Slide 8: "The solution is the Strategy Screen. It is a simple and objective framework for aligning efforts and saving energy." Move to Slide 9: "The key benefit is: Earn more by doing less."	Definition of Strategy Screen. Benefits: focus, time savings, strategic decisions.	Conceptual + visual presentation.	Emphasize the phrase on Slide 9: "Don't go after something you can't afford to lose."
20-40	10-11	Activity 1: Brainstorming Criteria (20 min). (5 min) Explanation: Use Slide 10: "What is crucial for **YOUR organization?**" (10 min) Group work: Project Slide 11. Task: "In small groups, discuss and select your 5-7 most critical criteria." (5 min) Sharing: Each group shares. The facilitator notes common themes.	Examples of criteria: Alignment with Mission, Budget, Probability of Winning.	Brainstorming, Small group work, Sharing.	Circulate and observe; do not intervene in the content of the groups. For the sharing session, you can use a virtual whiteboard or a blank slide.
40-50	12	Step 2: Weight Criteria (10 min). Use Slide 12 to explain the importance of weighting and show the example. Show the specific example on Slide 15. Give instructions: "Individually, distribute 100 points among your criteria." Project Slide 14 during the activity.	The weighting of criteria reflects the strategic priorities of the organization.	Explanation, Example, Individual Activity.	You can say: "This is like allocating your important budget. Not all factors can weigh the same."

Minute	Slide number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
50-70	16, 18-19	Activity 2: Build and Test the Draft (20 min). (5 min) Construction: Use Slide 16 to explain how to create a simple scoring system. (10 min) Testing: Give instruction: "Think of a past opportunity and score it with your draft." Leave Slides 18 or 19 on the screen. (5 min) Chat reflection: "What was easy? What was challenging?"	Objective scoring system. Retroactive testing of the tool.	Individual hands-on activity, simulation, chat reflection.	Reaffirm how this connects to their actual work. "Would this scoring have guided the same decision your organization made in the past?"
70-80	17	Group Discussion: Refinement and Implementation (10 min). Project Slide 17. Facilitate discussion using the ideas on the slide: "How can you ensure that this remains a 'living tool'? How would you use the 'prototype mindset'?"	"Prototype mindset." The screen as a "living tool" that needs to be tested and adapted.	Facilitated group discussion.	Do not correct, just listen and record. Use the phrases on the slide to guide the conversation: "Test, Track, Adjust."
80-85	20	Next Steps (5 min). Project Slide 20. Go over the key points: "Your next steps are: 1. Form a team to refine the draft. 2. Test it retroactively. 3. Start using it!"	Concrete steps for post-workshop implementation.	Summary, Call to Action.	Say: "Take these three concrete actions with you to start applying this tomorrow."
85-90	20	Questions, closing, and evaluation (5 min). Keep Slide 20 for questions and answers. Move to Slide 21 to thank everyone. Finish on Slide 22, asking them to scan the QR code for the evaluation: "Please tell us how it went today."	N/A	Questions and Answers (Q&A), Closing.	End on a positive note, connecting today's effort with a future of more strategic decisions and less stress.

Activity 1: Brainstorming and Prioritizing Your Criteria

- **Objective:** Participants will collaboratively generate and prioritize key criteria for decision-making on the search for funding.
- **Time:** 25 minutes (5 min individual brainstorming, 15 min small groups, 5 min plenary)
- **Tools:**
    1. Zoom breakout rooms.
    2. Shared digital whiteboard (Jamboard, Miro) or shared Google Slides (one slide per group).
    3. Reference to pages 2-3 of the "Creating the Future" PDF.
- **Instructions for the Facilitator:**
    1. **(Individual - 5 mins):** "First, individually, take 5 minutes to write down as many factors as possible that your organization *should* consider before deciding to pursue a funding opportunity. Think broadly: mission, money, risk, relationships, capacity. Use pages 2 and 3 of the guide Camilo Forero provided for inspiration—there are lots of great examples there!"
    2. **(Small Groups - 15 mins):** "Now, I'm going to divide you into small group rooms of 3-4 people.
        - Share your individual lists.
        - As a group, discuss these criteria. Which ones are absolutely essential? Which ones are 'desirable but not essential'?
        - Your task is to agree on a list of the **5-7 most critical criteria** for organizations like yours when deciding to pursue funding.
        - Write them on your group's shared Jamboard/Google slide.
        - Appoint one person to share your group's top 3 criteria in the main room.
    3. **(Plenary Sharing - 5 mins):** "Welcome back! Let's hear from each group. Spokesperson, please share your group's top 3 criteria. I will write them down." (The facilitator writes common themes or distinctive ideas on a master slide/whiteboard). "Do you notice any common themes? Any unique criteria that stand out?"

Activity 2: Weighting Your Criteria and Building Your Draft Screen

- **Objective:** Participants will understand the importance of weighting and create a first draft of their individual/organizational strategy screen.
- **Time:** 25 minutes (Part 1: 10 mins explanation of weighting and individual weighting, Part 2: 10 mins screen construction, Part 3: 5 mins quick reflections in the chat)
- **Tools:**
    1. Participants use their own notes (paper or digital).
    2. Reference to page 4 of the "Creating the Future" PDF (example table).
- **Instructions for the facilitator:**
    1. **(Explanation of Weighting and Individual Work - 10 mins):** "Great, everyone has a solid list of 5-7 criteria. Now, not all criteria are equally important. This is where weighting comes in. Look at the example on page 4 of the guide. They have assigned percentages that reflect relative importance—for example, 'Alignment with Strategic Priorities' gets 25%.
        - Individually, take your list of 5-7 criteria. Distribute 100 percentage points among them according to how important each one is *to your organization*.

If 'Alignment with Mission' is absolutely critical, it might get 30%, while 'Future Funding Potential' might get 5%. Make sure your percentages add up to 100%."

- (Quick check): "Does anyone feel comfortable sharing a criterion they gave a high weight to and briefly why?"

2. **(Screen Construction - 10 mins):** "Now, let's turn this into a simple scoring tool. Decide on a maximum total score for an opportunity—say 20 points, as in the example, or 100 points if you prefer.
   - For each of your weighted criteria, calculate its maximum possible points. (Example: If your total is 20 points, and 'Alignment with Mission' has a weight of 25%, then 'Alignment with Mission' gets 0.25 * 20 = 5 maximum points).
   - Create a simple table for yourselves with: Criterion | Weight (%) | Max Points. This is your first draft of your Strategy Screen!
3. **(Quick Reflections in Chat - 5 mins):** "Okay, you have a draft screen! In the chat, quickly share: What was easy about this process? What was challenging?"

Activity 3: Quick Evaluation of a Call for Proposals/RFP with Your Strategy Screen

- **Objective:** Participants will practice applying their draft Strategy Screen to a real or hypothetical opportunity and discuss the experience.
- **Time:** 25 minutes (5 min preparation, 10 min individual application, 10 min small group discussion and sharing)
- **Tools:**
  1. Drafts of Strategy Screens from participants.
  2. A short sample RFP (provided by the facilitator, or participants use one they are familiar with).
  3. Zoom breakout rooms.
- **Instructions for the Facilitator:**
  1. **(Preparation - 5 mins):** "Now is the time to quickly test your draft screen. I'm going to share a link to a very short sample Request for Proposal (RFP) [Or: 'Think of a recent RFP you considered—either one you applied for or one you passed on. If you have it handy, great. If not, just remember its key features.'] Your task is to do a 'quick assessment' of this RFP using your new Strategy Screen."
  2. **(Individual Application – 10 mins):** "Take the next 10 minutes to read/recall the key aspects of the RFP and score it against each criterion on your draft screen. Come up with a total score. Don't overthink it—this is a quick test. Would the score you gave it lead to a 'go' or 'no go' decision? How does this compare to the actual decision made (if applicable)?"
  3. **(Small Group Discussion and Sharing - 10 mins):** "Now, in your small group rooms:
     - Share the opportunity you evaluated (briefly) and the score it received using your screen.
     - Did the screen help clarify your thinking?
     - Were there any criteria that were difficult to score for this particular RFP?
     - Did using the screen change your initial feeling about the opportunity?

    - Quickly select one key idea or challenge that your group discussed to share."

4. **(Plenary Sharing - integrated into the "Refinement and Implementation" section of the main lesson plan):** "Welcome back. What were some key ideas or challenges in applying your screens?" (This leads to discussions about subjectivity, the need for a small team, and refinement of the screen).

One-Page Summary Guide

Focused Funding: Your Quick Guide to Strategy Screening

Inspired by "Creating the Future: A Guide for Local Leaders" by Camilo Forero

What is a Strategy Screen?
It is a set of **clear, objective criteria** that your organization uses to consistently decide whether a funding opportunity is worth pursuing. It helps avoid subjective decisions ("it looks good") and keeps you focused.

Why Use It? Earn More by Doing Less!

- **Save Time and Resources:** Avoid wasting effort on proposals with little chance of success.
- **Improve Decision Making:** Provides a structured and objective framework.
- **Aligns with Strategy:** Ensures opportunities support your mission and goals.
- **Facilitates Learning:** Allows you to track why you win or lose and adjust your approach.
- **Key Principle:** "Don't go after something you can't afford to lose."

How to Create Your Strategy Screen (Simplified Process):

1. **Define Your Criteria (5-7 Key):**
    - Involve a small, strategic group.
    - **Examples of Criteria (choose your own!):**
        - Is it aligned with our **global strategic priorities** and **vision**?
        - What is our **probability of winning** (experience, donor, competition)?
        - Is the **budget amount** sufficient and does it cover costs (including indirect costs)?
        - Does it allow for **strategic alliances** with local actors?
        - What is the **donor's reputation and track record**?
        - Is it aligned with our **technical competencies**?
        - Potential for **future funding or expansion**?
2. **Assign weights to the criteria:**
    - Not all criteria are equally important.
    - Distribute 100 percentage points (%) among your selected criteria.
    - *Example: Mission Alignment (30%), Budget (25%), Probability of Winning (20%), etc.*
3. **Establish a Scoring System:**
    - Decide on a maximum total score (e.g., 20 or 100 points).
    - Assign maximum points to each criterion according to its weight.
    - *Example (Total 20 pts): Mission Alignment (30% weight) = 6 pts max.*
4. **Evaluate Opportunities:**
    - When analyzing a new call for proposals, score each criterion.
    - Add the points to obtain a total score.
    - Use this score to inform your decision to "go" or "not go."

Get it started and improve it!

- **Prototype Mindset:** Start simple. Don't seek initial perfection!
- **Test:** Evaluate past opportunities (won and lost) to calibrate.

- **Use Consistently:** Spend 15-20 minutes evaluating each new opportunity.
- **Record and Analyze:** Keep track of opportunities (pursued, discarded, scores, results).
- **Ask for Feedback:** If you don't win, ask why. If you win, ask why too!
- **Adjust:** Your Strategy Screen is a **living tool**. Review and adjust it periodically as your organization grows and learns.

"The best strategic frameworks are those that evolve with your organization."