

## Session 11

### Assess Resources

<b>Purpose</b> Identify the resources needed to implement an advocacy strategy and plan how to obtain them.	
<b>Objectives</b> By the end of this session, participants will: <ul style="list-style-type: none"><li>• Identify existing resources to implement their advocacy strategy</li><li>• Identify how to access the resources needed to implement the advocacy strategy that their organization lacks</li></ul> <b>Total time:</b> ~1 hour	<b>Session Preparations</b> <b>Materials Needed:</b> <ul style="list-style-type: none"><li>• Session11_AssessResources _PowerPoint file</li><li>• Handout:<ul style="list-style-type: none"><li>- Assessing Resources Checklist</li></ul></li><li>• Flip chart paper and markers</li><li>• Prepared flip charts (titles only) posted on the four walls of the room:<ul style="list-style-type: none"><li>- Contacts</li><li>- Skills</li><li>- Staff</li><li>- Materials</li></ul></li></ul> <b>Set-Up:</b> <ul style="list-style-type: none"><li>• Small groups at tables</li></ul>

#### Overview of Assessing Resources—15 minutes

1. Use the speaker notes, questions, and probes provided to encourage participant interaction during the session.

Show slide 1.

Explain: **During this session, we will identify the resources needed to implement an advocacy strategy. We will also discuss how to raise funds and obtain other necessary resources.**

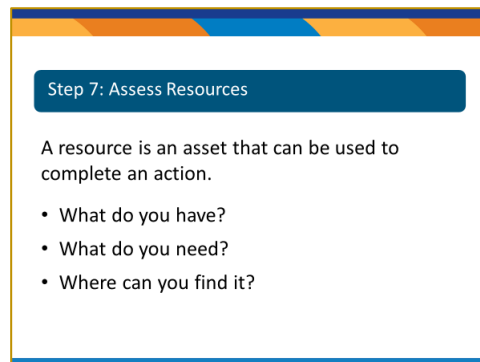
2. Show slide 2 (title only).

Say: **The seventh step in the advocacy strategy development process is to assess your resources.**

Ask: **What is a resource?** Probe for: A resource is an asset such as money, materials, or staff used to develop and implement your advocacy strategy.

Advance the slide to reveal the definition.

Say: **A resource can be funding, staff, skills, or time. To successfully execute the strategy, you may need all of these things.**



In this session we will look at what you already have, what additional resources you need to execute your plan, and where these resources can be found.

3. Show slide 3.

Say: Advocacy requires resources such as contacts/connections, skills in specific areas, monetary resources to fund activities, and staff to manage and execute activities—essentially everything needed to conduct your advocacy activities. The exact resources needed depend on the advocacy activities you have selected to reach your goal and objectives.



One of the most important resources is money or funding. Most all advocacy strategies will require some amount of funding to accomplish the objectives.

Before implementing an advocacy strategy, take stock of the resources you have and what you need to implement the strategy effectively. You cannot effectively implement a strategy if you do not have the resources. Assessing resources allows you to be realistic about strategy implementation.

4. Show slide 4.

Say: When developing your advocacy strategy, it is important to complete an inventory of your internal assets. Some items may be addressed through additional funding or partnering with external individuals or organizations.

What do we have?

Resource	Low Resource Level	Medium Resource Level	High Resource Level
Funding			
Expertise in appropriate technical areas			
Strong allies with skills to complement our weaknesses			
Organizational reputation for this work			
Relationships with target audiences or messengers			
Knowledge of the policy development process			
Strong knowledge of the issue			

Distribute a copy of the handout, Assessing Resources Checklist, to each participant.

Review the items on the checklist and briefly discuss how to address shortcomings.

Say: We reviewed some of the items from this checklist earlier during the “Define Issue” session. Recall that while conducting your root cause analysis, you identified and discussed many of these resources to decide whether to take on the policy issue.

Some of these resources are being addressed through this training—such as building your own advocacy skills and identifying partnerships that will complement your organizational capacity. If your organization is weak or lacking key resources, take a moment to consider if you are well suited to execute an advocacy strategy on the specific issue.

**Review Resources Activity—15 minutes**

5. Show slide 5.

Ask the participants to work in their assigned small groups to complete a resource review using the checklist.

Say: Review each of the resources on the checklist and, as a group, decide whether you have a low, medium, or high level of resources to accomplish the activities related to the objective you have been working on.

A high resource level means that your organization has enough of that resource to be able to implement the plan tomorrow without needing to acquire the resource. A medium resource level means that the resource is in place but you could use some additional support/enhancement before you implement your strategy. A low resource level means that the resource is not available in your organization and would need to be acquired externally.


For example, if your organization does not have the anticipated funding to complete the activities you just brainstormed, you would check “low resource level.” Use the “Notes” column to keep track of any thoughts related to the resource.

These resource assessments are only for your organization and will not be shared with the large group. Be honest with yourself about what you may need to effectively implement your plan.

Allow groups 15 minutes to complete the checklist.

**Activity—Complete a Resource Review**

- For each item on the checklist, decide if you have a low, medium, or high level of resources to support the activities for the objective. (15 minutes)
- No group presentation.



Provide reminders of the time left. Circulate among the groups to answer questions.

6. Show slide 6 (title only).

Say: While all of these resources are important to implementing the strategy, one resource that many organizations struggle with is funding.

Ask: What are some methods that can be used to raise funds? Probe for: items listed on the slide.

Advance the slide to reveal the list of fundraising methods.

Say: Before thinking about fundraising, make sure you have a good idea of the funding you may need to execute your strategy. Maybe you only need a small amount of funding because much of the work is paid for under an existing funding stream. However, if you are going to conduct numerous or expensive advocacy activities, you may need more sustained funding.

What methods are used to raise funds?

- Fundraising events (dinner, film festival, galas, auctions)
- Membership dues
- In-kind contributions
- Grants from government or private donors
- Individual contributions
- Online fundraising
- Fee-based services
- Approaching current funders to expand work

Adapted from: An Introduction to Advocacy—Training Guide, SARA Project/AED, 1999.

7. Show slide 7.

Say: Most people tend to focus on donors or grants for advocacy work because these sources often supply the largest sums of money. The process of researching and attracting funders is similar to the advocacy process—you need to review the landscape, research funders to understand who aligns with your goal, identify target audiences/funders and their interests, and craft your message to the funder. Fundraising will push you to apply your advocacy skills.

When considering potential donors, make sure to look at their priority issues, what activities they have funded or not funded, and the types of organizations they have funded in the past. Additionally, look at their funding cycles and when grants and opportunities are usually available.

Similar to conducting advocacy work with policymakers, relationships can play a critical role in making progress with donors. Look

Exploring Donors

- Which donors have funded advocacy initiatives in your country/region? Consider individuals, private businesses, foundations, and corporate social responsibility initiatives.
- What are the priority issues for these donors?
- What types of activities have they funded? What have they not funded?
- What organizations have been funded by donors of interest and for what amount?
- What connections do you have with donors of interest? Who can provide an introduction?

Adapted from: Resource Mobilization Training, New Partners Initiative, AED 2010

across your organization and board to see who can help network and make connections.

Consider using the audience analysis questions to better understand potential donors. It is important to know as much about your funder as possible to ensure that they are a good match for your work.

When identifying potential donors, consider the questions on this slide. Look critically at the responses to these questions and consider if this donor is a good fit for your organization and advocacy goal. Keep this list handy for future consideration.

#### 8. Show slide 8.

**Say:** We have discussed one of the resources, funding, in depth. However, there are other resources to consider, such as contacts, skills, staff, and materials.

This next activity will provide an opportunity to consider how to obtain some of these other resources.



#### Resources Carousel Activity—25 minutes

#### 9. Show slide 9.

Use the instructions on the slide to introduce the activity.

**Say:** Like the “activity carousel” in the last session, around the room you will see four flip charts.

Divide the participants into four teams and assign each team a flip chart. Instruct the teams to stand near their assigned flip chart.

**Say:** You have two minutes to list methods for acquiring resources related to the heading on your flip chart. For example, to “acquire skills” you may list partnering or staff training. The methods for procuring these resources do not need to be related to any specific advocacy goal or objective—the only criteria are that it fits under the heading and can be used for advocacy.

**Activity—Resources Carousel**

- Form 4 teams, with 1 team per flip chart.
- Under each heading, list methods for obtaining that resource:
  - Contacts
  - Skills
  - Staff
  - Materials
- After 2 minutes, move to the next flip chart.
- Review the methods as a group at the end.



After two minutes, each team will switch to the next flip chart.

Remember, you are brainstorming about HOW to obtain that resource.

Aim to have approximately four to five methods on each flip chart. Stop after each group has gone to each flip chart at least once; repeat if necessary. Table 1 at the end of this session plan includes possible responses.

After teams have completed the lists, gather the large group near one flip chart and review/discuss the methods listed on the flip chart using the questions below.

Ask:

- What is missing from this list?
- What are some new and unusual methods that could help you obtain the resources you need?

Add participant responses to the flip chart.

After reviewing the first flip chart, move on to the next; repeat until each of the flip charts has been reviewed.

Clarify proposed methods if needed.

### Wrap Up—5 minutes

10. Show slide 10.

Conclude the session by reviewing the learning objectives, summarizing the key concepts and definitions, and clarifying any participant questions.

#### Learning Objectives—Session 11

- Identify existing resources to implement your advocacy strategy
- Identify how to access the resources needed to implement the advocacy strategy that your organization lacks

Table 1. Possible responses for resources carousel

<b>Contacts</b>		
Website	Facebook	Social media
YouTube	LinkedIn	Google
Twitter	Government commissions	Phone directory
Networks	Information center	Field visits
Meeting attendee lists	Personal connections	
<b>Skills</b>		
Training	Online learning	Attending meetings
Studying textbooks	Reading articles	Reviewing reports
Research studies	Site visits	Coaching
Practicing	On-the-job learning	Short courses
Exchange programs	Internships	Partnering
<b>Staff</b>		
Recruit	Head hunting	Exchange program
Volunteers	Internships	Professional advisor
Partnering	Appointing a working group	Working with influencers
Consultants	Appointed advisors	Peace Corps volunteers
<b>Materials</b>		
Donations from the community	Borrow items	Rent equipment

### Assessing Resources Checklist

Resource	Low Resource Level	Medium Resource Level	High Resource Level	Notes
Funding				
Expertise in appropriate technical areas				
Strong allies with skills to complement our weaknesses				
Organizational reputation for this work				
Relationships with targets or messengers				
Knowledge of the policy development process				
Strong knowledge of the issue				