Overview of Resource Development Facilitation

This module may be presented as a one-day, extended session divided into three or four parts, with breaks: or over two partial days, which would give participants more time to develop their individual plans and presentations. The components are:

1. One or more brief motivational presentations, preferably by individuals who have been successful in generating nonfederal cash to support an AFI Project or other IDA program. Such presentations could occur at the beginning (most effective), between the technical overview and the case study, or between the case study and the individual plan development component. A motivational talk is not absolutely essential but is desirable because fundraising is a daunting topic, especially for smaller organizations without dedicated funding staff. Further, such presenters may also supplement the lead facilitator in the small group exercises and in advising groups as they work out their own fundraising plans.
2. A technical overview of key factors to consider in supporting an AFI Project, such as restrictions on uses of funds, project lifecycle, differences between resources and funds, understanding agency characteristics that affect funding, the effects of increasing efficiency as well as increasing funding, analyzing a particular funding context, identifying potential funders, and using these factors to outline a fund development plan.
3. Use of a case study to emphasize these factors
4. Development of a basic fund development presentation in teams, practice using it, and discussion of its effectiveness and potential improvement.

Time	Topic and Methodology	Presenter/ Facilitator	Materials
Up to one hour Full Group	**Motivational Talks about Fund Development** 20-minute presentations from each presenter followed by Q & A		Provided by Facilitator
15 minutes	**Break to Move to Small Groups**		
20 minutes	**Introduction of Resource Development** • **Difference between Fund Development and Resource Development** Facilitated Discussion • **AFI Funding Mix and Costs: Efficiencies** Facilitated Discussion • **Review reason for focus on resource development, NOT only fundraising or fund development**	IDA Facilitators	2 FC one with FD one with RD— brainstorm differences between FC or PPT with diagram

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	• **Issues Census** (2 options to facilitate) A. Option 1 • Individually list issues (3 minutes) • Share with the group • Develop a list of top three from each group • Present B. Option 2 • Individually list issues (3 minutes) • Brainstorm issues or use Round Robin. Develop one cumulative list • Keep posted for entire training and refer back to ensure issues are addressed		FC for tables
30 minutes	**Funding Success Round Up:** • Small Group Exercise • Large Group Facilitated Discussion	IDA Facilitators	FC for tables; FC to process small groups
25 minutes	**Intro to the Context for Fund Development—Presentation/Overview** **1: AFI Projects** **2: Internal Structure** **3: External World** **Context #1: AFI Project** • **AFI IDA Project** Facilitated Discussion about the aspects of the AFI Project that affect fund development: o Restricted uses of funds o Definition of nonfederal funds • **Stage in the Life Cycle** Facilitated Discussion during which facilitator fills in a flip chart version of the chart with a focus on: o Characteristics at the stage o Resource development issues at the stage • **Outcomes** o Facilitated discussion about outcomes and effects on the logic model and resource development (different outcomes lead to	IDA Facilitators	PPT with 3 contexts PPT with process question FC with chart FC with logic model PPT with outcome

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	different activities, which lead to different resource needs) o Individual activity if there is time (to fill in outcomes chart)		categories
30 minutes	**Context #2: Internal Structure** • **Internal Structure-** Facilitated Discussion about the aspects of the AFI Project that affect resource development. • **Costs** Presentation on different cost bases. • **Context for Costs** Presentation on the context for costs [**Note**: Emphasize that this should be part of a stakeholder case or funder case when introducing IDAs, i.e., need to talk about <u>benefits</u> of IDAs and asset building with the costs—not costs alone.] • **Budgets** Presentation and individual or small group activity o Go over example of budgeting for match and budgeting for operations o Let people in small groups or individually complete exercises (tables) • **Budgeting for AFI Projects** Review budgeting for AFI Projects and understanding the math o Let small groups or individuals complete the table**.** o Be sure to ask question under Table E: **"Based on cost data from pervious section, is there enough funding to operate the AFI-funded IDA Program?"**	IDA Facilitators	PPT with process question PPTs for cost presentation PPTs for budget presentation PPTs for AFI Budgeting
30 minutes	**Context #3: External World of Funding** • **External World-** o Facilitated Discussion about the external world that affects resource development.	IDA Facilitators	PPT with question

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	• **Review funding mix**
	     ○ Facilitated Discussion
	
	 • **Other Funding areas or categories-**
	     ○ Brainstorm
			PPT or FC with funding mix
			
			 FC for Brainstorm

15 minutes	**Overview of the Resource Development Plan**
	 • Presentation of the components and application of the resource development plan
	 • *Note*: Emphasize that the plan should be specific about the how, such as.,
	     ○ how will we make initial contact with prospective funder,
	     ○ what materials we will need,
	     ○ how we will develop them,
	     ○ who will be responsible, etc.
		IDA Facilitators	PPTs with steps

15 minutes introduction **TIMING TK FOR DEVELOP MENT** And next day	**Case Study Exercise** **NEEDS MORE DEVELOPMENT AND EXPLANATION OF THE EXERCISE AND STEPS; SEGMENT ON SECOND PART AND DEBRIEFING** • Read case study • Complete Part 1 for case study • Complete budget for case study • Develop revenue goals and efficiency goals • Develop objectives • Brainstorm strategies to meet goals and objectives • Using specifics in case study, list benefits and costs for funder • Develop pitch: materials, roles in presentation • Present pitch in group to someone playing funder; someone else should be the observer.	IDA Facilitators Ernesta and Inna serve as resource people/ helpers	Case Study Handout FC—need to figure out what teams should put on FC, i.e., which pieces do we facilitate

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	• Large group discussion about pitches. • Revise pitch based on large group discussion in preparation for panel.		