



**CCB/EYE CARE CARIBBEAN
CARIBBEAN COUNCIL FOR THE BLIND
&**

THE FOUNDATION FOR EYE CARE IN THE CARIBBEAN

PURPOSE

“Preventing Blindness and visual impairment; while restoring sight and creating opportunities for persons whose sight cannot be restored.”

TRAINING COURSE

**“INTRODUCTION TO FUNDRAISING/RESOURCE
MOBILISATION”.**

1.0 AIM OF COURSE:

To provide participants with a basic and practical grounding in the knowledge (principles), skills and techniques of fundraising/resource mobilization from public and private sources.

2.0 COURSE OBJECTIVES:

By the end of the Course, Participants will:

- Describe the mission, goals and objectives of their respective Organisations and the importance of fundraising/resource mobilization to its existence.
- Identify and describe at least seven principles of fundraising/resource mobilization.
- Describe at least seven key skills/qualities required in resource mobilization that the Fundraiser should possess.
- Identify at least five major sources of fundraising/resource mobilization in the public and private sectors, within their respective countries.
- Draft a three-year fundraising/resource mobilization plan for their respective Agencies, or refine an existing plan, utilizing knowledge and skills acquired during Course.

3.0 PARTICIPANTS:

Participants will be selected from Member Agencies of CCB, with preference given to persons actively engaged in Fundraising or serving on the Fundraising Committees of National Societies/Associations. The Course will be restricted to not more than twelve persons in order to facilitate intensive work.

4.0 TRAINING STRATEGIES:

- 4.1 The Introductory Course would be implemented over four (4) days, through a mixture of: - presentations, 'brain storming', mini-lectures, group discussions, case studies and written assignments.
- 4.2 Training materials would be provided in accessible format - print, large print, braille, electronic.
- 4.3 Participating Agencies would be required to submit, in advance, a Fundraising/Resource Mobilisation Plan or Outline for a period identified, with some targets for Year 1.
- 4.4 Participants will develop/refine a Plan/Outline, as part of the Course Assignment.

5.0 COURSE [OUTLINE] MODULES:

5.1 MODULE I: [Introduction; Course Objectives; Organisations' Structure, Missions, Goals; and General Concepts of Resource Mobilisation].

- 5.1.1 Introduction of Course Participants.
- 5.1.2 Introduction to Course: - establishing Course objectives.
- 5.1.3 Structure of the Organisation:
 - Organisation Mission, Goals, and Objectives.
 - Importance of Fundraising to Organisation.
- 5.1.4 Introduction to general concepts of fundraising/resource mobilisation.
 - Fundraising.
 - Resource Mobilisation.

5.2 MODULE II: [Establishing a case for Resource Mobilisation, Key Principles in building Donor Relationships, Skills required in Resource Mobilisation].

- 5.2.1 Fundraising Department: Establishing a Resource Mobilisation Case.

- The Organisation: Key Measurements – [P.A.S.S.]
- Performance
- Accomplishment
- Stature
- Success
- The Organisation's features and benefits.
 - Analysing Organisation's Strengths and Weaknesses

5.2.2 S.W.O.T. Analysis

5.2.3 Building Donor Relationships – Key Principles.

- Asking – personal approach
- Understanding the Donor's viewpoint
- Fundraising is about people
- Fundraising is selling – marketing/advocacy
- Credibility and Public Image/Relations
- How much to ask for – (Donor research)
- Donor recognition - saying 'thank you'
- Seeking long- term involvement and commitment
- Accountability
- Reporting

5.2.4 Skills required in Resource Mobilisation (Mobiliser)

- Enthusiasm and Commitment
- Ability to Ask
- Persuasiveness
- Confidence in dealing with rejection
- Persistence
- Truthfulness
- Contacts and the ability to make contacts
- Good Organisational Skills
- Good Social Contacts
- Imagination and Creativity
- Opportunism

5.3 **MODULE III: [Developing a Resource Mobilisation Strategy]**

5.3.1 Developing a Resource Mobilisation Strategy

- Planning your approach
- Analysing your position
- Needs of Organisation:
 - Dollars and cents
 - Building/Equipment
 - Human Resources
 - Training
 - Materials/Supplies
- Conducting research
- Developing a Fundraising Plan
- Monitoring and evaluation of Fundraising.

5.4 **MODULE IV: [Sources of Funds]**

5.4.1 Available Sources of Funds:

- Membership Fees
- Individual Donors
- Government Grants/Subventions
- International Donors
- Community Fundraising
- Sponsorships
- Foundations
- Companies
- Income Generation/Cost Recovery
- Deeds of Covenant
- Legacies

5.5 MODULE V: [Funding through Project Proposals]

5.5.1 Seeking funds through preparation of Project Proposals

- Researching Agencies – noting geographical and other restrictions;
- Researching Funding Cycles, Limitations, Programmes;
- Proposal Design and Format
- Writing the Proposal
- Submission of Proposal and Documentation.
- Follow-up

5.6 MODULE VI: [Collaborative Events/Activities].

5.6.1 Seeking Funds through collaborative Activities.

- Advantages of collaborative events/activities
- Possible Zonal Events/Activities

5.7 MODULE VII: [Monitoring System for Resource Mobilisation]

5.7.1 Monitoring of Resource Mobilisation Activities

- Agency Systems/Methods - Quarterly/Annual Reports and Audits (Are these adequate?)
- Developing a common Monitoring Format for Zone/Region.

6. PRACTICAL ASSIGNMENT:

- Developing/refining a Fundraising Plan
- Drafting Action Plan for Year 1

7. PRESENTATION OF PLANS/DISCUSSIONS:

8. FUTURE ASSIGNMENT/ACTION:

9. COURSE EVALUATION:

- Questionnaire
- Discussions

10. TRAINING MATERIALS/EQUIPMENT:

- Pre-training materials – questionnaire, assignments;
- Prepared handouts
- Easel/Flip Chart
- Markers, pens, pencils, note-pads, paper
- Multi-Media Projector
- Computers

- Brailers

11.0 FACILITATORS:

- (Will be identified)

[End of Course Outline]

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