



Report on  
**National Workshop on  
“RESOURCE MOBILIZATION”**

**Venue**

LV Prasad Eye Institute, Banjara Hills, Hyderabad

**Date**

26th & 27th May 2005.

# PREFACE

Resource Mobilization is a crucial contributory factor in the sustenance and development of organizations involved in VISION 2020: The Right to Sight movement.

There is little doubt that the movement will remain strong only if it receives sufficient financial resources. The financial support is required particularly in the NGO sector which is rendering incredible service towards the cause of avoidable blindness.

But unfortunately, there appears to be a disparity, paucity and difference in knowledge and skills in mobilizing the required resources for the NGO sector.

Besides Governmental support, the NGO sector receives major funding from international agencies. The approach and formalities between the giver and the taker differ from organization to organization.

To raise funds is a skill of sorts. To enable the medium and grassroot organizations comprehend and implement the art of fund raising, a two day national workshop was organized by VISION 2020: The Right to Sight – INDIA in Hyderabad on 26<sup>th</sup> & 27<sup>th</sup> of May, 2005.

This workshop unveiled a basket of opportunities. It served as an orientation for the NGOs and INGOs on how to supply and access resources in the field of eye care.

Participants eagerly shared their perceptions, practices, problems and prospects in what was dubbed as an “ *experimental learning process*”.

The workshop brought various key players such as the Corporate, International NGOs, national NGOs, Government officials and representatives of peripheral Organizations together. They sat through sessions collectively thinking about the past, present and future scenario of fund raising and how to be suitably prepared. The Hyderabad meet, by all means, was a good beginning and the need for more such discussions and networking across the country was unanimously felt by the participants for better resource availability in eye care.

We humbly dedicate this incisive report which highlights essential ingredients of fundraising, its applicability and applications in the field of eye care for the benefit of our old, new and future partners. I take this opportunity to thank all our promoters and participants for their wonderful inputs. But for their committed involvement, the Resource Mobilization workshop could not have been such a memorable and pleasant experience.

In your service

PKM. SWAMY  
National Executive Director  
VISION 2020: The Right to Sight - INDIA

## **Introduction**

While Non-Government Organizations (NGOs) in India are playing a critical role in developing the region's political and socio-economic sectors / institutions, they face a number of challenges including the decrease of grant funding from official development assistance and international foundations.

In India, NGOs are playing a major role in all eye care activities and contributing significantly towards achievement of the National goal of elimination of avoidable blindness. All these activities need to be continued for a long time more efficiently and effectively. It is important for the NGO's, to re-align their resources for the sustainability of the programme. However most of the NGOs lack expertise in mobilizing resources for their activities in proper time and mode. There are lots of practical and procedural difficulties that limit the fund raising capacities of the organizations. The leader of a NGO should be proactive and equipped with alternatives tools and techniques to ensure the fund flow for their activities in the diverse/adverse situation.

While recent surveys and studies show that there are strong traditions of philanthropy in the region, predominantly it has been to religious institutions. By their very nature, history and the process by which they originated, most non-profits also face a challenge of credibility and gaining legitimacy. A lack of public awareness and transparency have contributed to the problematic situation. Non-profits that engage in resource mobilization efforts and undertake new methods of generating resources are often viewed with suspicion.

Vision2020: The Right to Sight-India believes that competently managed developmental organizations will form the backbone of a sustainable civil society that will ensure a better quality of life for its people. Through its work Vision2020-India has found that the direction the region's non-profit sector is currently taking will require a systematic building and forming of its capability to generate and manage resources from within their communities and particularly from the external sources for eye care.

## **Aim**

The National workshop on Resource Mobilization was aimed at addressing the recent changes that have occurred in the donor environment and the subsequent implications for the operations of NGOs in Eye Care Programmes/initiatives.

## **Objectives of the workshop:**

The purpose of the 2 day Workshop on Resource Mobilization was to enable the learners to mobilize a diverse range of financial and non-financial resources for their organizations. They would be able to identify a range of potential sources of financial and non-financial resources appropriate to their context and devise an

effective resource mobilization strategy for the organization that is consistent with the values of the community and particularly the eye care sector of which they are a part. They should be able to use the knowledge and skills gained from this course to advance the financial sustainability of their organization.

More specifically:

- To strengthen the Resource Mobilization capacity of the organizations working in Eye Care.
- To enable NGOs to network at local, regional and international levels, horizontally and vertically

## **Methodology**

The methodologies adopted to achieve the said objectives were as follows:

- Experience sharing of various leading funding/ fund raising organizations
- Providing information on various methods of fund raising and information about various Donor Agencies working in Eye Care
- Presentations of the themes by resource persons
- Group works and Practical exercises
- Case study presentation

## **Participants**

About 78 persons from different parts of India (**N-10, E-12, W-20, S-36**) participated in the workshop. Resource persons from different developmental sectors such as Maj. Gen. S.S. Sandhu, Executive Director, CONCEPT, New Delhi, Mr. Rajesh Srivastava, Corporate consultant, Mumbai, Mr. Nikhil Narayan, IT consultant, Bangalore, Mr. Kishore Rao, Managing Trustee, Karunashraya, Bangalore besides our Eye care fraternity Dr. G.N. Rao, President, IAPB, Mr. R.D. Thulasiraj, LAICO, Madurai, Dr. Ravishankar, Sankara Nethralaya, Chennai, Dr. C.S. Shetty, LCIF, Bangalore, Ms. Tanuja Joshi, Venu Eye Institute and Research Centre, New Delhi, Mrs. Ramam, LV Prasad Eye Institute, Hyderabad, participated and offered their inputs and also helped the group members to have better perception of resource mobilization.

## NATIONAL WORKSHOP ON RESOURCE MOBILIZATION

26 - 27 MAY 2005



Organized by - Vision 2020: The Right to Sight-India  
In Association with - L.V. Prasad Eye Institute, Hyderabad.



### Venue and Dates

The National workshop on Resource Mobilization was organized on 26<sup>th</sup> & 27<sup>th</sup> May 2005 at L.V. Prasad Eye Hospital, Banjara Hills, Hyderabad.

### Proceedings

#### **Day-One (26<sup>th</sup> May 2005)**

(Morning Session 9:30 to 9:45)

At the outset Mr. PKM Swamy, National Executive Director, Vision2020-India welcomed all the delegates and briefed the purpose of the national workshop. After brief introduction of the delegates, participants were divided into smaller groups of 5 per each group and asked to write their own perception in Resource Mobilization in words/ sentences/diagrams. All chart papers were displayed on the board for the benefit of all delegates. All the delegates got a good understanding on Resource Mobilization by going around the charts depicting observations. Having had an orientation to the topic, once again all delegates divided into ten groups. Each group had delegates from East, West, North and South. All ten groups were given 10 different topics to discuss among themselves. The topics were:

1. Building mutually rewarding partnerships between INGOs and local NGOs

2. How to run your NGO into a sustainable organization
3. How to choose and develop alliances with donors.
4. Money is not everything; how to leverage non-financial support from Government.
5. How to mobilize resources in kind from private sector
6. How to build an integrated fund raising appeal
7. How to approach corporate foundations
8. How to develop an effective public relations strategy for NGOs
9. How to mobilize local resources to raise funds including legal perceptions
10. How to develop an on-line fund raising strategy

10 resource persons were assigned to all 10 groups to guide them. Besides a core team of 5 members was around all the time to assist the groups. All the groups discussed for an hour and came up with their observations.

**(1<sup>st</sup> Plenary Session 11:00 to 12:00)**

Theme:1-Building mutually rewarding partnership between INGOs & NGOs

Theme:2- How to run your NGO into a sustainable organization

In the first plenary session *group-1(A)* and *group-1(B)* presented their observations before experts shared their experience on the themes earmarked.

**GROUP – I (A) Presentation Charts**

**Group Theme:-** Building mutually rewarding partnership between INGOs & NGOs

**Group Adviser:- Dr. G.N. Rao**

I. **APPROACH**

(a) Quality Requirement

- Satisfy yourself whatever you are
- Regulation compliance
- Professionally managed hospital
- Transparency & audits for accounts
- “Collaboration in true sense”( What they want and what you want must be agreed by both party)
- Community agreed partnership

II. **EQUITY**

No discrimination in “3G”

- (a) Gender (b) Geographical (c) Generation ( Management have a all generation peoples)

III. **FUTURE – SCEINARIO OF FUNDS**

- (a) Funds are moving away & are likely to region specific
- (b) Funds will preferred for capacity building, training & consultancy and Management support

- (c) Less & less unit cost is likely
- (d) Concept of comprehensive eye care

#### IV. EXTEND OF COLLABORATION

- (a) Operational expenses – preferably self generated  
(These may be categorized into three i. manage only Case flow, ii. Manage Case flow + depreciation, iii. Manage ii plus Capital exp)
  - (b) Capacity building
  - (c) Quality never compromise
  - (d) Equity, bench marking, human rights( no exploitation)
  - (e) Valued organization – no compromise with morale value
  - (f) Strength of convection
  - (g) No short tem game (making profit )
  - (h) Quality management ie patient survey, ISO certification
  - (i) Academic approach should not be guided by management approach (money)
  - (j) Support in form of kind
  - (k) Regular reporting
- Quote by Dr. G. N. Rao (You have to be continuity exceptional to bet continued)

Dr. G. N. Rao, President, IAPB shared his experiences and made observations on the group work on the theme “Building mutually rewarding partnerships between INGOs and local NGOs “. In his presentation, he informed that in India Health Care is predominantly controlled by the Government and in priority wise it is lower in the order. He emphasized that INGO support is a very essential component of eye care delivery in India. In his observation he pointed out that there is no funding available to local NGO’s through INGO’s. He appealed all the INGO’s and the NGO’s to develop a true spirit of collaboration among them. To have this local NGO’s should focus on their credibility, contribution and sustainability. (***Presentations sheets were attached as annexure IV-a***)

#### **Group-I (B) Presentation Charts**

Group theme:- How to run your NGO into a sustainable organization ?

Group Adviser:- **Mr. Thulasiraj**

Sustainability has two aspects,

1- Financial aspects, 2- Managerial aspects

#### **Financial aspects**

More than 100% Cost Recovery is must

#### **Recurring Expenditure**

- Should be met by organization itself for its core activities(can be achieved by 30% paying, 20 % subsidized 50% non-paying)
- Linking with Donors
- Core activities can be sustain through Corpus fund

## Capital expenditure

- Donors (they support for training, survey, infrastructure etc). To get it organization should have credibility, Accountability. transparency
- Fund raising team may be formed for this
- Involvement of Local community (Local Resource mobilization)

**Funds** can be seen in two ways

### *Donor Driven*

For Donor Driven funds (it is individual NGO choice, at the survival stage it may be one option, depends strength and convictions of the NGO)

### *Not donor driven*

Depends on NGOs Credibility, Accountability, transparency and Good project reports)

One should aim at multiple donors

Raising fund in a group (like minded NGOs, Link up with Bigger NGOs) is good options for smaller NGOs

Mr. R.D. Thulasiraj, President, Vision2020-India shared his experience and made observations on the group work on the theme “How to run your NGO into a sustainable organization”. In his presentation he gave examples of the principles on (a) Resource mobilization in relation to sustainable development and ( b) Building capacity vs. Dependence. He explained the relationship between the following:

- Short term benefits vs. Long term goals
- Infrastructure creation vs. Utilization
- Revenue generation capacity vs. spending capacity
- Broad based vs. few funding sources
- Emotional giving vs. mission oriented support
- Core activity vs. developmental activity

He also presented a sustainable model for eye care delivery through schematic diagram and explained its components.

There was the Q&A session where resource persons answered the queries of the participants on the above topics. The main lessons from the group presentations and the presentations from resource persons were noted. (***Presentations sheets were attached as annexure IV-b***)



## **(2<sup>nd</sup> Plenary Session 12:00 to 13:00)**

Theme-1-. How to choose and develop alliances with donors?

Theme-2-. Money is not everything; how to leverage non-financial support from Government.

### **Group-II (A) Presentation chart**

Theme:- How to choose and develop alliances with donors?

Group Advisor:- **Dr. Ravishankar**

- A corporate can be defined as a profit making enterprise
- Corporate should get involved in developmental issues to create a positive societal image, to enjoy tax benefits
- It is not imperative that only corporate involves in ophthalmic field will support eye care initiatives.
- Any corporate agency can be convinced with a sound, transparent and good impacting project to support eye care initiatives.
- Agencies need to have a sound background of work & credibility to strengthen your case. Personal support with these corporate is also important
- Involve corporate to become an active stakeholder in you're projects.
- Local resource mobilization from corporate operating in/around your area of work can be useful. These corporate will have more interest in the development of that area, are likely to have more knowledge of your work and aware of the need of your projects.
- Challenges that small NGO's facing would be lack of marketing expertise to sell projects.

In the second plenary session Dr. Ravishankar from Sankara Nethralaya, Chennai and Dr. S. Chandashekar Shetty from LCIF were on the dais as resource persons. After *group-II (A)* presentations, Dr. Ravishankar shared his experience and made his observation on the group work on the topic "How to choose and develop alliances with donors". He presented some simple ways on how to choose and develop alliances with donors. Also he explained what prompts donors to give donations and how the local NGO's can assure these to maintain a long term relation with them. (***Presentations sheets were attached as annexure IV-c***)

### **GROUP – II (B) presentation charts**

Theme:- Money is not everything; how to leverage non-financial support from government.

Group Adviser:- **Dr. C.S. Shetty**

- Identify the areas of non-financial support and – involve yourself
- These are:- Infrastructure – building, equipments, vehicles, supplies, Human resources – (ophthalmic surgeon, MLOP, others)
- H.R. training (short term, long term identify and asked for )
- IEC (Information Education and Communications) approach respective bodies
- Planning- (like set up institution, knowledge from local people can be taken)
- Research & rehabilitation (Social welfare dept can help)
- M.I.S.(one should take local institutions help to develop good MIS)
- (Leverage DBCS, SBCS, Central Ophthalmic Cell, Health, Education, Women & Children department, Social Welfare department. Panchayatraj Institutions, Political & Bureaucratic to get involve in our activities for resources other than financial resources)

Dr. Shetty shared his experience after *group-II (B)* presentation and made his observations on the group work on the topic “Money is not everything; how to leverage non-financial support from Government”. He briefed on the various government initiatives and the schemes that are available for the NGOs and how they can access those easily. He appealed for greater coordination and networking among government, private and voluntary sectors. (***Presentations sheets were attached as annexure IV-d***)

### **(3<sup>rd</sup> Plenary Session 14:00 to 15:00)**

Theme-1- How to Mobilize Resources in Kind from Private Sector

Theme-2- How to Build an Integrated Fund Raising Appeal

### **GROUP – III (A) presentation charts**

Theme:- How to Mobilize Resources in Kind from Private Sector

Group Adviser: – **Mr. Kishore Rao**

1. Non- financial resources are important & we should be sustainable

2. Financial resources are unpredictable & one should not always look for these
3. We have to change the mindset of community to understand & realize that they are responsible for their welfare
4. How to go about and how to do –
  - Build references
  - Prepare courses / banners/ ( how to leverage people)
  - Conduct awareness campaigns very thoroughly
  - Volunteering services (You have to show that our people are kind enough)
  - Supplies at camps e.g., food, medicines etc.,
  - Doctors to give free treatments.

In the post lunch session Mr. Kishore Rao, Developmental consultant from Bangalore and Mr. Rajesh Srivastava, Corporate consultant, Mumbai were on the dais). After presentations by the groups *Group-III (A)*, Mr. Kishore Rao shared his experience and made observation on the group work on the topic “How to mobilize resources in kind from private sector”. He gave examples from his own experience and explained how he developed *Karunashraya* (a home for cancer patients). It was a lively presentation by a NGO head to other NGO heads. (***Presentations sheets were attached as annexure IV-e***)

### **GROUP – III (B) presentation charts**

Theme:- How to build an Integrated Fund Raising Appeal

Group Adviser: – **Mr. Rajesh Srivastava**

- Appeal should be relate to the persons/donors to whom we are projecting it
- Appeal should emphasis the benefit of the less privileged people
- We should explain the modus operandi ( strategy to be explained clearly)
- It should be targeted selected organizations to reach out them specifically
- What benefits the donors/ agency will get should be emphasized
- What difference this contribution will bring to the donors should be spell out
- Assure the judicious utilization of received funds, transparency in your account (give them the option to audit their contribution)
- It has to be sustained for long and limelight.

After presentations by the groups *Group-III (B)*, Mr. Rajesh Srivastava shared his experience extempore and made observations on the group work on the topic “How to build an integrated fund raising appeal”. He gave example of the eye donations appealing advertisement on TV by actress Ashwarya Rai. How it make difference to the mind set of the public when an actress addressing them to contact her for more information. There were a lot of discussions on these issues shared by all.

#### **(4<sup>th</sup> Plenary Session 15:15 to 16:15)**

Theme-1 How to approach corporate foundations

Theme-2 . How to develop an effective public relations strategy for NGOs

#### **GROUP – IV (A) presentation charts**

Theme:- How to approach corporate foundations ?

Group Adviser: – **Major Gen. S.S. Sandhu**

- Internal return in eye care is much more than the return from any other health programmes)
- Getting corporate fund is not a short term
- First establish the relationship trough providing awareness training
- Identify the corporate which are like minded with you ( find out their priority)
- Explain your Vision, Mission and target group with whom you are going to work
- Present the status of your organization – HR strength besides – Goal
- Present cases for support ( Which can have impact on people)
- Involve the persons in your activity
- Target not only the big corporate but also the small business men also
- Understand the environment around and explain it

*Group-IV-(A)* presented their observations before the resource persons. Maj. Gen S. S. Sandhu, Executive Director, CONCEPT, New Delhi, shared his experience and made observation on the group work on the topic “How to approach corporate foundations “. He explained key insights of the present day corporate fund raising and important issues for approaching corporate foundations. From his rich experience he shared how different people approached the corporate foundations and associated with them. He also suggested some tools and techniques on how to maintain the relationship with corporate body. (***Presentations sheets were attached as annexure IV-f***)

### **GROUP – IV (B) presentation charts**

Theme:- How to develop an effective public relations strategy for NGOs

Group Adviser: – **Ms. Tanuja Joshi**

Questions that dealt with by the group are

(A) Why - To improve services

- For growth and development
- To become self reliant
- To popularize organization (service or product)
- To communicate organization existence
- To attract targets audience (community, patients, media, individuals Corporate, Government, social organization etc.,)

(B) What - Building a healthy relationship with the public

- developing binding ness between organization and public
- Linkage to fulfill objective
- To bring a feeling of belonging, participation and ownership

(C) How - Community participation in camp activity (Strategies)

- Conducting & participating in Seminars, conferences/
- involving Media in different activities
- Publishing Brochures, Pamphlets, posters, magazines, etc.
- Providing & Sending direct mail/e-mail
- Highlighting & organizing physical events
- Training of staff in behaviors and attitude with public
- Displaying vision statement of organization
- Sharing of information, activity, achievements for transparency
- Accountability through sending utilization report for credibility.

After *group-IV (B)* presentation on their group work, Ms. Tanuja Joshi, Managing Director, VEI& RC, New Delhi presented a paper on “How to develop an effective public relations strategy for NGOs”. She started giving the historical perspective of public relation to the present definition of public relation. She also highlighted the tools to develop PR and strategy to implement and maintain it. (***Presentations sheets were attached as annexure IV-g***)

### **(5<sup>th</sup> Plenary Session 16:15 to 17:15)**

Theme-1 How to mobilize local resources to raise funds including legal perceptions

Theme-2 How to develop an on-line fund raising strategy

### **GROUP – V (A) presentation charts**

Theme:- How to mobilize local resources to raise funds including legal perceptions

Group Adviser: – **Mrs. Ramam**

We have thought the locations where we are going to mobilize the resources. But in general

1. We have to enhance the “awareness” of your activity among patients and various NGOs.
2. Communications means like monthly /quarterly/annually activity reports / news letters to be updated regularly. (reflect the donors contribution)
3. Involve potential donors into your activities
4. Send acknowledgements in the form of “thanking letter/ felicitations etc.
5. Professional approach by having fundraising team. Train the team.
6. To acquire/ renew tax exemptions ( approach Income tax departments, auditors, charity commissioners etc)
7. Not only mobilize the resources but also it is important to managing the resources are important.

In the final plenary session of the day *group-V (A)* presented their observations. Mrs. Ramam, Senior administrator, LVPEI presented her experience on “How to mobilize local resources to raise funds including legal perceptions” and made observations on group work. She gave the examples of the LV Prasad Eye Hospital and explained the steps to be followed. (***Presentations sheets were attached as annexure IV-h***)

#### **GROUP – V (B) presentation charts**

Theme:- How to develop an on-line fund raising strategy

Group Adviser: – **Mr. Nikhil Narayan**

To raise fund in on-line we need to have:

1. A good website & sustained e-mail program
2. Online payment system & FCRA registration
3. Feedback to donor must (online)
4. Transparency in information
5. Links with corporate etc.,

6. Role of an expert agency to develop and update the site
7. Question was raised can vision 2020 help in this regard?

After *group-V (B)* presentation, Mr. Nikhil Narayan, IT consultant, Bangalore shared his experience on “how to develop an on-line fund raising strategy” and made observations on the group work. It was totally a new aspect of fund raising. He gave the comparison on the cost involvement in conventional fund raising methods and new IT methods. His talk gave a new orientation to all participating NGO’s to think differently. (***Presentations sheets were attached as annexure IV-i***)

### **Day Two (27<sup>th</sup> May 2005)**

In the morning Mr. PKM Swamy, Executive Director Vision2020-India briefed the proceedings of the last day. Participants were divided into four groups region wise and they were asked to develop actionable points on the following:

- Key insights on resource mobilization
- Key dilemmas on resource mobilization
- Road map for mobilizing resources within their network

Resource persons were there in each group to facilitate the group work. Most of the delegates had expressed that first time they were sitting and talking about the resource mobilization among themselves. After an hour long discussion groups came out with their findings in terms of tools, methods, strategies and critical dilemmas on resource mobilization. All four groups presented their observations and discussed among all. Resource persons, Representatives from INGO’s and other delegates took part in the concluding panel discussion. Dr. Pararajasegaram, WHO consultant, Mr. Nagarajan, Mrs. Lalitha Raghuram also took part in the discussion and answered the queries. Questions related to resource mobilization and other aspects of eye care were asked by the participants and answered by resource persons. Reading materials were made available to all participants. In the concluding remarks Mr. Swamy expressed vote of thanks to one and all for making the workshop successful.

### **Annexure**

- I. Programme Schedule**
- II. List of participants**
- III. Certificate of participation**
- IV. Work Sheets of the Resource Persons**
- V. Group work sheet to the specific questions (region wise) and other suggestions on different areas.**
- VI. Photographs (CD attached separately)**
- VII. Set of paper presented (CD attached separately)**

## Programme Schedule

### NATIONAL WORKSHOP ON RESOURCE MOBILIZATION

Organized by:- Vision 2020: The Right to Sight-India  
In Association with: - L.V. Prasad Eye Institute, Hyderabad.

Date:- 26<sup>th</sup> -27<sup>th</sup> May 2005

Venue:- L.V. Prasad Eye Institute, Hyderabad

#### PROGRAM SCHEDULE

### 26<sup>th</sup> May 2005

8.00 AM to 9.00 AM

Registration & coffee

9.00 AM to 9.30 AM

Opening Plenary

Small groups of five introduce each other discuss the question “**Based on your experience, What is the most important lesson on Resource Mobilization that you would like to share**”.

Write answers in one flip chart and pin up.

9.30 AM to 09.45 AM

Individuals review flip charts

9.45 AM to 10.45

Five Themes - **Small Group work**

10.45 AM to 11.00 AM

**Tea break**

**11.00 AM to 12.00 PM**

**Theme – I Group and Panel presentation**

1. Building mutually rewarding partnerships between INGOs and local NGOs - Dr. GN Rao
2. How to run your NGO into a sustainable organization - Mr. R.D. Thulasiraj

**12.00 PM to 1.00 PM**

**Theme – II Group and Panel presentation**

3. How to choose and develop alliances with donors - Dr. Ravishankar
4. Money is not everything; How to leverage non-financial support from Government - Dr. C.S Shetty

1.00 PM to 2.00 PM

**Lunch break/ group photo**

**2.00 PM to 3.00 PM**

**Theme – III Group and Panel presentation**

5. How to mobilize resources in kind from private sector - Mr. Kishore Rao
6. How to build an integrated fundraising appeal -Rajesh Srivastava

3.00 PM to 3.15 PM

**Tea break**

**3.15 PM to 4.15 PM**

**Theme IV Group and Panel presentation.**

7. How to approach corporate foundations/ Fundas in FR Maj. Gen. S.S. Sandhu
8. How to develop an effective public relations strategy for NGOs Ms .Tanuja Joshi



**4.15 PM to 5.15 PM**

**Theme V Group and Panel presentation**

9. How to mobilize local resources to raise funds  
including legal perceptions  
10. How to develop an on-line fundraising strategy

Mrs. Ramam  
- Mr. Nikhil Narayan

**5.15 PM to 6.15 PM**

Five small groups review the following topics based on their presentations made on the five themes

1. Tools and methodologies of Resource Mobilization (define & describe them clearly)
2. Strategies for Resource Mobilization (define & describe them clearly)
3. Critical dilemmas of Resource mobilization (list)
4. Key insights on the Resource Mobilizations
5. Road maps for mobilizing resources

6.15 to 9.00 PM

***Gala Dinner (Vision 2020-India foundation day)***

**27<sup>th</sup> May 2005**

We need to develop

- Key insights on resource mobilization
- Key dilemmas in Resource mobilization
- Road map for mobilizing resources

9.00 AM to 11.15 AM

- #. Five small groups present their findings in terms of tools, methods, strategies and critical dilemmas, followed by discussion.  
#. How to write winning fundraising proposals – PKM Swamy

11.15 AM to 11.30 AM

**Tea break**

11.30 AM to 12.30 PM

National /Regional groups – making it work in practice

12.30 PM to 1.30 PM

Closing Plenary

We are all for a better world -  
How do we work together?

**List of Participants**

Sl. No	Name	Organization	E-mail
1	Col (Dr.) M Deshpande	H.V,Desai Eye Hospital, Pune	<a href="mailto:m_deshpande@vsnl.net">m_deshpande@vsnl.net</a>
2	Fr. George Elavunkal	Kutch Vikah Trust, Kutch	<a href="mailto:kvt1@rediffmail.com">kvt1@rediffmail.com</a>
3	Ms. Vaishali Panchal	-Do-	<a href="mailto:kvt1@rediffmail.com">kvt1@rediffmail.com</a>
4	Ln. S. Ram Prasad	RR Lions Eye Hospital, Palakhhol	<a href="mailto:rrlions@rediffmail.com">rrlions@rediffmail.com</a>
5	Mr. Bikash Chandra Mohanta	Vision 2020- India	bikash@vision2020india.org
6	Mr. PKM Swamy	Vision2020- India	swamy@vision2020india.org
7	Mr. Anand Sudhan	Sadguru Netra Chikitsalaya, Chitrakut, MP	anand_sudhan@rediffmail.com
8	Ms. Sangeeta Pinto	ORBIS India New Delhi	sangeeta@orbisindia.org
9	Dr. H. S Chundawat	AlokNayan Mandir Eye Institute, Udaipur	alakhnayan@bppl.net.in
10	Mr. S.K Das	Sukri Mission Eye Hospital, MP	
11-12	Dr.M.M.Joshi, Shri.P.K.Byahatti	M M Joshi Eye Hospital, Hubli	mmjoshi_hubli@rediffmail.com
13	Dr.Sudhir Mahashabde Hon.Secretary	Indore Eye Hospital Indore	smahashabde@eth.net
14	Ms. K. Manimala	Sankar Foundation, Visakhapatnam, AP	sankar_foundation@hotmail.com
15	Ms. P. Sujata	Sankar Foundation, Visakhapatnam, AP	sankar_foundation@hotmail.com
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**Certificate of Participation**



## **Worksheets on different themes**

### **Group-1**

#### **Theme-1 :-Tools and Methodologies for Resource Mobilization**

Needs Assessment: Aims, objectives, mission, vision & values  
Organization should go for its need assessment in terms of its mission values and what we are asking for and it should match with vision of the organization

Potential Resources: Listing/ Shopping and Tapping

Potential resources are (a) Individuals - Philanthropists (b) Local NGOs, (c) INGOs & Foundations (d) Corporate & Industries (e) Government, Local Bodies (f) Media

Methodology:

For Individuals

- One to one approach
- Service delivery (patient care)
- Show-casing the facilities of the organizations
- Reporting regularly
- Peer counseling (patient counseling)
- Addressing group of people ( by doctors, heads)
- There should be matching grants

Local NGOs

- Specific request
- Highlight shopping list & per size & our contribution

INGOs & Foundations

- Need analysis, Objectives & values
- Communication
- HRD training
- Operational research
- Multiple funding.

Corporate & Industries

- Regular reporting & good homework
- Service delivery, capture clientele

Government & Local Bodies

- Grant in aid
- Training
- Land subsidies
- Tax exemptions /Customs duties
- Education department
- Vision Centers
- Integration of National Health programmes
- Tapping resources from other resources

Media

- Information technology, newspapers, radio, T.V
- Vision guards/ link workers (local media)
- Local source

## Group-2

### Theme-2:-What Strategies to be adopted for Resource Mobilization

- Vision -Without a Vision no Mission
- Present status organization – HR besides, materials and Goal and plan accordingly
- Find out a Case for Support, Which can have impact on people
- You have to understand your needs, do Analysis Your own
- Stakeholders - Identify Realistic potential donor Identify/ Resources/ Approach and Cultivate it
- You must understand the environment around you
- Understand the Environment Around (in and around)
- Do your SWOT & PEST analysis

Strength	Political
Weakness	Economical
Opportunity	Social
Threats	Technological

- Funds:- You can mobilize from Individuals/ Government/ INGOs/ Foundations /Corporate/ Local Income
- You should be careful on Cost efficiency and Cost effectively

## Group-3

### Theme-3:-Identifying the Critical Dilemma in Resource Mobilization

Group separated the resources in cash and kind and explained the dilemmas relating to these

#### CASH

- How to we access corpus funds? Questions to be answer by RP.
- Difficult to interest donor in specialties other than Cataract
- Funding agency will not support all aspects of your service delivery, devote necessarily support income generation initiatives of yours
- Dilemma to raise 50% of capital costs despite having to support operational /maintenance cost.
- No joint voice to mobilize Government's activity support
- Need to be change in attitude of donors and recipients should change towards the act of donation.
- Need a clear-cut policy for acknowledgement of donations/ donors.



## KIND

- Donor expects you to take whatever you offer with a thanks regardless of its usefulness to recipient.
- Donations not required are difficult to reject and yet keep donor's interest sustained
- Pharma companies tend to give away medicines which are about to expire. How do we handle the situations?
- Pre-assessment of commitment of volunteers is necessary.
- Volunteer interest what is not sustained & committed to be taken care
- Most recipients practically not equipped to assist or conduct resource mobilization.
- Thinking out of the box and creatively keeping in mind local situations for resource mobilization.
- Inability to tap local resources which should be the 'bread & butter' of eye care Institutions
  
- We should understand Patient and program are not beneficiaries, they are the resources.

### **Group-4**

#### **Theme-4:- Key insights on the Resource Mobilizations**

Various aspects to be considered

What is our Goal?

What is our vision to achieve the goal? There should be a mission statement.

There are various stages here we need resources

- Starting the project
- Maintaining stage
- Growing stage

For doing all these things we have the basic instinct

- Culturally to be sound and ethically we have to be strong
- Credibility of the organization
- Transparency in all aspects
- Social accountability

We should know the Legal aspects of it

At all levels we have to be professional

Staff should be culturally oriented

Most desirable sources of getting money is from Patients (it leads to sustainable)

We should be clear in the mind what we are talking.

### **Group-5**

#### **Theme-5:- Road maps for mobilizing resources**

We have to be a professional team for Resource Mobilization

There should be a clear-cut proposal- aim is to achieve self-sustainability

There should be a good proposal containing clear objectives, Human R. cost containment. Quality services

Tools to achieve these are:

- Awareness in community
- Involve local people
- Identify the Potential donors
- Training of HR all cadres
- Dedicated Fund Raising team
- Sponsorship at all level
- Prepare an in-house scheme to generate funds
- Avail all the tax exp
- Insurance for the all equipments
- Use IT services
- Maintaining PR. Acknowledge the donors in proper way
- Identify the National and international organization of like minded
- Clarity in your mind and attitude

“TRY AND TRY UNTIL YOU ARE SUCCESSFUL”

### **Group Work-Region Wise on the questions:**

1. How do you like to exchange your Financial and non-financial resources?
2. What difficulties and constrains you anticipate t take it forward?
3. How do you propose to tap the resources from Govt.?
4. What role you expect from V2020 –India to play?

### **Northern Region**

About exchanging resources:-Regional body to be formed. There should be periodical meeting. Identify potential source/partners in region – bring them together to help each other. List of NGOs and INGOs can be listed and would be made available to all

Sharing expertise inthe region to build capacity of partners is must. There should be skill transfer programme among the partners.

Develop good rapport with regional organization for resource sharing

Difficulties & constrains:-Careful use of media/politician to implement program in region.

Role of V2020-India:- State level regional groups to be formed by Vision 2020-India and take the advisory role for the state plans.

Training in apex centre can be facilitated by Vision2020-India

### **Eastern Region**

- (i) We Must Visit Each Other
- (ii) Organize Regional Meetings
- (iii) Exchange of Views (Problem & Success)
- (iv) Complementing Each Other

(v) Claiming the DBCS funds in groups

### **Western region**

About strategy:- All member should clear their mind and form a coordination body and meet periodically, and communications, sharing through booklets or news bulletin

Sharing of technical expertise and IT related knowledge, Non clinical expertise transfer may be a good option.

About tapping the resources:- Govt. should be approached together to implement the programmes. Govt. schemes should be made available in the form of booklet.

Vision2020-India can play advisory and capacity building. Arranging training for medical, managerial staff in the apex institutes in subsidizes fees.

### **Southern Region**

Sharing resources:-Sharing common cause, communicating each other, by forming regional consortium, having workshops/ seminars/ annual, meetings, creating web sites

Exchange financial resources are not possible.

Indirect help can be given to larger NGO to smaller NGO (activity specifics)

Difficulties- We are over crowded, crossing over different geographical area

Proposal to tap govt. resources:- DBCS fund is available, other departments, allocating lands, waving taxes, invite govt. officials to attend your activities,

Role of Vision2020-India:- V2020-can be facilitator and coordinator.

## Photographs



(Group works in progress)



(Dr. G.N.Rao, President, AIPB and Dr. Pararajasegaram, WHO Consultant, addressing the delegates on the occasion. )



( Resource persons Presenting their topics)



(Resource panel answering the questions of the participants)