

# Leadership, Resource Mobilization, and Budget Management Facilitator Guide

A Coaching Tool for Health Advocacy  
Committees in Liberia



**USAID**  
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**Breakthrough  
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# Acronyms

HAC	Health advocacy committee
CSO	Civil society organization
USAID	United States Agency for International Development
MoH	Ministry of Health

# Preface

Working with the health advocacy committees (HACs) in Liberia, we have identified some capacity gaps in the following areas: leadership, resource acquisition and management, and budgeting.

Since 2021, Breakthrough ACTION started the establishment of Health Advocacy Committees in Liberia working closely with MOH and County health Teams to build the capacity of multiple stakeholders and influential leaders in SMART advocacy with the aim to advocate for issues affecting the health system to improve health outcomes. Community leaders and influential members from faith-based, traditional, social and civil society groups are often able to influence community actions that can lead to change at the individual and community levels, and can even influence policy actions to improve health outcomes. While leveraging on this, Breakthrough ACTION Liberia trained 736 influential community members (500 males and 236 females) and established 47 HACs in 12 supported counties (i.e., 4 districts per county).

Since then, the HACs have identified and resolved several health-related challenges in their communities using the SMART advocacy approach. Examples include building new hand pumps, refurbishing damaged hand pumps, building toilets, building bridges and community roads,, repairing ambulances among others. As the group’s responsibilities continue to expand, many of these groups have gone on to formalize their status as independent civil society organizations.

## Purpose of This Booklet

The coaching booklet aims to enhance the knowledge and skills of HAC members using practical, hands-on instructions for raising and managing resources, leading effectively, and managing budgets. It explains how to talk about the programs, address community needs, and solicit donations from supporters, as well as how to compete with other CSOs for funding opportunities. This practical guide thus supports the following objectives: learning effective leadership skills, transitioning to an independent CSO, mobilizing resources, and developing proposals.

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# Lesson 1: Introduction to Coaching Booklet

**Session overview:** Coaching classes are structured programs aimed at helping HAC team members develop skills, increase performance, and overcome challenges in their roles. These sessions are led by experienced coaches or mentors from within the organization or hired from outside the organization.

**Objectives:**

- Identify other participants by name.
- Outline structure and expectations of the coaching activity.
- Outline expectations and desired outcomes by the end of the coaching activity.

**Procedure:**

1. Welcome participants and introduce the session.
2. Write your name on a piece of paper and place it on the table for fellow participants to recognize you.
3. Ask each participant to introduce themselves.

**Preparations:** Copies of the coaching booklet, nametags, pen.

**Materials:** Training booklet, marker, poster sheet, paper, tape.

**Session type:** Roundtable discussion.

**Time:** 10–15 minutes.

**Facilitator's note:** Discuss with participants the structure and composition of the coaching sessions to help them understand what to expect and the desired outcomes for the sessions. Facilitate the following key discussion points:

- Getting to know each other.
  - Introduce yourself to the participants.
  - Ask participants to introduce themselves.
- Structure of coaching lessons and sessions.
  - Identify a suitable location to hold sessions.
  - Identify a suitable time to hold sessions.
- Agree on how to communicate (e.g., phone call, text message).
  - Administer pre-test on leadership and resource mobilization.
  - Decide whether the test will be written or if verbal responses will be scored.

# Lesson 2: Introduction to Effective Leadership

## Session 1: Who is a Leader?

**Session overview:** This session aims to increase participants' understanding of leadership by defining who a leader is, what makes a good leader or bad leader, and the benefits of a good leader and disadvantages of a bad leader.

### Objectives:

- Define a leader.
- Describe a good leader and a bad leader.
- List the benefits of a good leader and disadvantages of a bad leader.

### Procedure:

1. Ask participants if they have been in any leadership role before, and invite them to share any experiences in their previous role as leader.
2. Write down the experiences on paper and allow other participants to ask questions or seek clarification.
3. Discuss the lesson.
4. Ask questions and write down answers.

**Preparations:** Review and become familiar with the coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, questions and answer session, discussion.

**Time:** 20–30 minutes.

**Facilitator's note:** Some participants may want to know the differences between leadership and management. Inform participants that leadership is not just a position. It is also a set of behaviors and qualities. Facilitate the key discussion points below.

A leader is someone who ...

- Influences team members to work.
- Guides others towards a common goal or vision.
- Coaches, guides, and inspires others.
- Motivates the team through challenging times.
- Guides individuals on their career path.

A good leader is someone ...

- With integrity who does the right things even when no one is watching.
- With vision.

- With courage.
- Who respects others.
- Who influences people positively.
- Who communicates effectively.
- Who shows empathy and understanding.

A bad leader is someone ...

- Who lacks integrity.
- Who does not have empathy or understanding.
- With poor communication skills.
- Who shows too much power.

The benefits of a good leader are ...

- Increasing effectiveness of the team.
- Setting a good example for others by always doing the right things.
- Helping to keep team members on track.
- Creating a strong vision and direction for the future.
- Inspiring hard work and showing appreciation of team members.

The disadvantages of a bad leader are ...

- Poor team performance (e.g., not meeting objectives).
- Lack of innovation in teamwork (e.g., no new ideas).
- Negative team reputation (e.g., the team is not known for doing the right things).
- Loss of trust and respect (e.g., the team is not trusted, people lose interest in working with the team).
- Missed growth opportunities (e.g., donors and grant institutions do not trust the team with funding or other opportunities).

## Session 2: What Are Leadership Positions, Roles, and Responsibilities?

**Session overview:** In this session, participants will gain basic knowledge and skills, and they will learn the responsibilities of leaders, barriers and facilitators of good leadership, and how to use leadership to influence people, followers, and subordinates positively.

### Objectives:

- Learn the roles and responsibilities of a leader.
- Understand the barriers and facilitators of good leadership.
- Know how to use the leadership position to influence people, followers, and subordinates positively.

### Procedures:

1. Ask participants to share their own definitions and experiences of leadership.
2. Ask participants to share their thoughts on a leader they admire and why they consider them effective.
3. Write responses on paper and allow other participants to ask questions or seek clarification.
4. Discuss the lesson.
5. Ask a question and write answers.

**Preparations:** Review and get familiar with the coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, questions and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Some participants may mistake leadership as showing power. Explain that leadership is not just taking responsibility, but demonstrating a set of behaviors that drives a team to many successes. Facilitate the key discussion points below.

- What is leadership?
  - Leadership is the action of leading a group of people or organization.
  - Leadership is about making decisions.
  - Leadership is about taking responsibility (e.g., for team failure, to keep team on track).
  - Leadership is the ability to influence decision making.
  - Leadership is about inspiring others to willingly follow and work towards a common purpose or goal.
- What are the roles and responsibilities of leadership?
  - To think about and plan wisely for the future.
  - To be an effective decision maker, especially for tough decisions.
  - To build and maintain effective teams.
  - To motivate and inspire others to perform at their best.
  - To listen actively to others.
  - To identify and help solve problems.
- What are some barriers to good leadership?
  - Ignoring things that might prevent, delay, or stop growth.
  - Not accepting mistakes.
  - Refusing help.
  - Not letting your team do its job.
  - Not asking team members to do the right things.
- What are some facilitators of good leadership?
  - Ensuring trust among team members.

- Communicating effectively.
- Empowerment others to be responsible.
- Holding oneself and others accountable.
- How can leadership influence people, followers, and subordinates positively?
  - By modeling appropriate behaviors and values in actions and words.
  - By encouraging joint efforts to promote teamwork and cooperation.
  - By offering mentorship, guidance, and support, especially during challenges.
  - By resolving conflict in a timely and positive way.
  - By recognizing achievements and demonstrating positive responses to good work.

## Lesson 3: Transition to CSO

**Session overview:** In this session, participants will learn what a CSO is, including its functions, requirements, and levels.

**Objectives:**

- Define a CSO.
- Describe CSO functions, requirements, and levels of work.
- Explain how CSOs coordinate and collaborate with others.

**Procedure:**

1. Ask participants to share their definitions and thoughts about CSOs, including previous experiences.
2. Write down the experiences and allow other participants to ask questions or seek clarification.
3. Discuss the lesson.
4. Ask question, and write down answers.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Facilitate the key discussion points below.

- What is a CSO?
  - A CSO is a non-profit, non-governmental organization that operates independently.
  - A CSO is funded by citizens who come together with one interest or goal.
- How does a CSO function?
  - CSOs advocate for policies, laws, and changes in citizens or government practices that align with their mission.
  - Many CSOs provide services directly to the community in need.
  - CSOs raise awareness about important social issues (e.g., human rights violations, health).
  - CSOs may engage in capacity building in a specific area in their mission.
  - CSOs work with local and international organizations to widen their impact and connections.
  - CSOs rely on fundraising (e.g., grants, donations, membership fees) to sustain operations.
- What are the requirements for a CSO?
  - Must be legal (e.g., registered with the government).
  - Must be non-profit.

- Must have a board of trustees and must ensure accountability.
- Must have a clearly written mission and vision.
- Must have a trustworthy financial management system.
- Must abide by every law, regulation, and reporting requirement.
- What are the different levels of CSO work?
  - Local level (e.g., grass-roots efforts concentrating on solving basic issues and needs).
  - Regional or sub-national level (e.g., issues affecting the region).
  - National level (e.g., country-wide issues, international cooperation).
  - Cross-cutting and multi-level (e.g., participating in a national campaign while pursuing grassroots initiatives, partnering with regional CSOs to address transnational issues).
- How do CSOs coordinate and collaborate with each other?
  - Working together on specific issues.
  - Conducting joint campaigns or advocacy initiatives to influence policymakers or public opinion.
  - Partnering with other organizations and community groups to implement joint projects.
  - Fundraising together to solicit resources, attract donors, and secure financial support.
  - Assisting each other in capacity building.

# Lesson 4: How to Sustain a CSO

**Session overview:** In this session, participants will gain basic knowledge on how to sustain a CSO, including the importance of the organizational structure, record keeping, regular meetings, paying dues, and follow-up actions.

**Objectives:**

- Know how to sustain a CSO.
- Understand the CSO organizational structure.
- Understand the importance of keeping documentation.
- Understand the importance of holding regular meetings.
- Understand the importance of paying dues.

**Procedure:**

1. Ask participants to share their own experience on CSO sustainability.
2. Ask participants to share their thoughts on the importance of maintaining documentation for the CSO.
3. Write down their responses and allow other participants to ask questions or seek clarification.
4. Discuss the lesson.
5. Ask questions and write down answers.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Facilitate the key discussion points.

- What are the ways to sustain a CSO?
  - Use multiple funding sources (e.g., grants, membership fees, dues, donations, fundraising).
  - Build and sustain healthy relationships with donors.
  - Invest in fundraising capacity.
  - Strengthen CSO leadership.
  - Focus on impact and results.
- What are the CSO organizational structures?
  - Membership base (all participants in the organization).
  - Board of directors (governing board responsible for setting organizational strategies, direction, policy, and priorities).

- Executive leadership (those responsible for day-to-day activities of the organization).
- Project team (those responsible for implementing the organization's activities).
- Volunteers (those who freely offer their time, skills, and experience to the organization).
- Advisory body (knowledge experts who provide guidance).
- Why is it important to maintain CSO documentation and records?
  - To maintain legal compliance.
  - To promote accountability and transparency.
  - To promote internal management and governance.
  - To conduct program planning and evaluation.
  - To comply with financial accounting and reporting requirements.
  - To ensure appropriate risk management and compliance in operations, programs, and activities.
- Why is it important to hold regular CSO meetings?
  - To support communication and coordination.
  - To encourage participation in CSO activities.
  - To develop the capacity building of the CSO.
- Why is it important to pay dues?
  - To maintain financial sustainability.
  - To facilitate resource mobilization.
  - To keep members engaged and encourage a sense of ownership.
  - To facilitate capacity building.

# Lesson 5: Resource Mobilization

## Session 1: How to Mobilize Resources to Fund HAC Work Plan Activities and the Organizational Mission

**Session overview:** This session seeks to teach participants how to identify different resource types and HAC needs and the importance of linking resource mobilization to HAC work plan activities and the organizational mission.

**Objectives:**

- Able to define and identify different resource types (e.g., cash or in-kind) and how to use them.
- Identify resources needed.
- Understand the importance of linking resource mobilization to HAC work plan activities, activities, and mission.

**Procedure:**

1. Ask participants to define a resource.
2. Discuss the lesson.
3. Ask question and write down answers.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Facilitate the following key discussion points.

- What are some examples of resources?
  - Money (e.g., grants, donations, dues).
  - Material or in-kind assets (e.g., computers, cars, office chairs).
  - Facilities (e.g., office space, conference hall).
  - Human capital (e.g., skills, knowledge, and relationships).
  - Information (e.g., data, research, reports, communication channels).
- How does the HAC identify the kinds of resources it needs?
  - By defining the organization's mission and goals.
  - By understanding the people involved or the problem to solve.
  - By conducting a needs assessment and prioritizing those needs.
  - By identifying existing resources and those still needed.

- By developing strategies to obtain resources still needed.
- Why is it important to link resource mobilization to the HAC work plan, activities, and mission?
  - To ensure a more sustainable approach to funding.
  - To ensure funds are directed towards activities that advance HAC core objectives.
  - To prepare for and address financial challenges.
  - To build HAC member capacity building in fundraising and grant writing.
  - To help HAC members take ownership.
- How can financial resources be used?
  - To cover operational expenses (e.g., rents, salaries).
  - To apply for grants to fund specific projects or activities aligned with the HAC mission.
  - To fund HAC programs, expand services, or invest in infrastructure.
- How can human resources be beneficial?
  - To recruit new members, conduct good public relations, perform record keeping.
  - To organize events (e.g., identifying advocacy areas, organizing stakeholder or partnership meetings).
  - To conduct outreach (e.g., raising awareness of the importance of using a latrine).
  - To provide direct service to the community (e.g., cleaning-up campaign).
- What are material or in-kind resources, and how are they used?
  - A computer, which can be used for report writing.
  - A vehicle or bike, which can be used for member transport.
- How can information resources be used?
  - To aid in decision making.
  - To learn from previous advocacy engagements.
  - To understand and evaluate issues (e.g., a particular health problem in a community).

# Session 2: How to Develop and Manage a Budget

**Session overview:** This session will help participants understand the process of developing and managing a budget, the various parts of a budget, linking the budget parts to the work plan, and the qualities needed to manage a budget.

**Objectives:**

- Able to define a budget and its different parts.
- Able to link budget parts to the work plan.
- Know the qualities needed to manage the budget (e.g., agreement, accountability, separation of duties such as approval and disbursing).
- Know the importance of each budgeting role.

**Procedure:**

1. Ask participants to define a budget.
2. Write down response on paper.
3. Discuss the lesson.
4. Ask questions and write down answers.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 1 hour.

**Facilitator's note:** Facilitate the key discussion points below.

- What is a budget?
- A financial plan showing expected income and expenses over a period of time.
- A guideline for using the organization's money.
- What are the parts of a budget?
- Income sources (revenue coming into the organization).
- Program expenses (costs of running the organization's programs and services).
- Administrative expenses (overall cost of running the organization).
- Fundraising expenses (costs of raising money for the organization).
- Contingencies (unexpected or emergency expenses).
- Savings (funds for future use).
- Emergency fund (money for quick use).

- How is a budget developed?
  - Clearly define HAC goals and activities.
  - Define program of services to offer.
  - Define short-term (2–3 months) and long-term (2–5 years) program objectives.
  - Identify income sources (e.g., grants, donations, membership fees, fundraising, sponsorships).
  - Outline all expenses (e.g., salaries, rents, equipment program expenses).
  - Prioritize spending based on the organization's goals and activities.
  - Break down expenses by category (e.g., personnel, program, administration).
  - Set realistic goals for income and expenses.
  - Adjust budget as needed to reflect any changes or unexpected costs.
  - Involve key stakeholders (e.g., board members, volunteers, community members).
  - Review and edit the budget every year to reflect changes in funding.
- How is a budget managed?
  - Maintain financial goals for the HAC.
  - Maintain a full budget outlining all sources of income and planned expenses.
  - Spend money based on the organization's needs and objectives.
  - Record all income and expenses regularly to ensure the HAC stays within its budget.
  - Build and maintain trust among the team members.
  - Review the budget regularly to make sure things are going as planned.
  - Build team member capacity.
- How are the different parts of a budget linked to the work plan?
  - Review the work plan tasks and activities.
  - Identify resources needed for each task and activity in the work plan.
  - Estimate the costs of each task or activity.
  - Break down budget into areas (e.g., salaries, supplies, materials, equipment).
  - Assign a budget to each task.
  - Monitor the budget and make changes if needed.
  - Communicate with the team assigned to implement the work plan.
- What qualities are needed to manage the budget?
  - Compliance.
  - Accountability.
  - Separation of duties (e.g., one person is responsible for approval and another for disbursing).
  - Understanding the importance of each role involved with the budget.
  - Abiding by all laws and policies (e.g., obtain chairperson approval for spending).
  - Reporting all spending and revenue, and ensure all members are informed.

- Encouraging everyone to have a role in and responsibility for the budget.

## Session 3: How to Leverage HAC Members to Benefit Organizational Resource Mobilization

**Session overview:** The session will focus on effective ways to recruit and manage talent in the HAC. Participants also will learn ways to solve problems and how to establish groups to encourage involvement and facilitate improvements.

**Objectives:**

- Know how to recruit new members and manage talent.
- Know how to resolve conflict amongst HAC members.

**Procedure:**

1. Ask participants how to recruit members.
2. Review and discuss lesson.
3. Ask questions and write down answers.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Facilitate the key discussion points below.

- How can HACs leverage their membership to benefit the organization's resource mobilization efforts?
  - Ensure HAC members are well informed about the organizational mission and goals.
  - Encourage HAC members to participate in decision making and provide feedback.
  - Offer skill building training for HAC members.
  - Encourage HAC members to network with other community-based organizations, donors, and individuals.
  - Ask HAC members to volunteer for fundraising events.
  - Ask HAC members to raise awareness about HAC activities.
  - Recognize and celebrate contributions of HAC members to HAC resource mobilization.
- How can new HAC members be recruited and member talents and skills developed?
  - Identify roles and skills needed (e.g., finance officer with a degree in accounting).
  - Develop clear and detailed job descriptions for each position.
  - Use different platforms to announce job postings (e.g., HR job, Emission).
  - Review submitted applications and Curriculum Vitae.

- Schedule interviews.
- Select new members.
- Provide training and support for new members.
- Create opportunities for growth.
- Appreciate everyone's contributions.
- Regularly seek feedback from team members.
- How can HACs resolve member conflict?
  - Recognize the conflict.
  - Set clear guidelines for how conflicts will be addressed within the HAC.
  - Ask those involved to come to a neutral place discuss the issue.
  - Look for areas of agreement or common goals among all parties.
  - Suggest practical solutions that respect everyone's interests.
  - If needed, invite board members or another stakeholder to help.
  - Once the conflict is resolved, keep the agreement record.
  - Check in occasionally to ensure parties in conflict are implementing the solution.
  - Ask those who resolved the conflict involved to help mentor in future conflict resolution efforts.

## Lesson 6: Recap and Experience Sharing

**Session overview:** This session is intended to review and reinforce lessons 1 to 5 and to clarify and address any gaps.

**Objectives:**

- Review lesson 1 to lesson 5.
- Identify knowledge gaps and provide further information.
- Ask questions to make sure everyone understands all five lessons.
- Conduct posttest to evaluate participant knowledge.

**Procedure:**

1. Ask participants to discuss areas they did not understand.
2. Write down responses.
3. Ask other participants if they can provide clarification.
4. Provide clarification as needed.

**Preparation:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Review all the topics above and conclude the session with a discussion on the following case study on good and bad leadership in Toah Village in Grand Kru County:

In recent years, the HAC in Toah Village faced a leadership challenge when their long-standing chairperson, Mr. Peter Moore, resigned. Mr. Moore was a good leader who listened to his members. He built relationships with donors and managed projects well, and he made sure everyone was aware of happenings within the organization. His departure left a leadership space that the HAC board struggled to fill.

The board of directors appointed Mr. Moses Dennis, a strong leader, as the new chairperson. Mr. Dennis had a passion for the organization but lacked the knowledge and skills to properly manage the group. He did not know how to raise money or coordinate HAC activities. Under his leadership, the HAC experienced misuse of funds, poor planning, and poor implementation, which decreased trust in the organization. Mr. Dennis also did not take responsibility for these outcomes and was unable to manage conflict within the organization. This poor leadership led to the downfall of the organization, and many community leaders were surprised and discouraged about the way it broke down.

Key discussion points:

- What did you learn from the story?
- What makes Mr. Peter Moore a good leader?
- How did Mr. Peter's leadership help the HAC?
- What makes Mr. Dennis a poor leader?
- List some of the mistakes Mr. Dennis' made.
- How did Mr. Dennis' leadership affect the group?
- What do you think should have been done to avoid the leadership crisis?

## Lesson 7: Mid-Term Review

**Session overview:** Use this session to reflect on the coaching sessions with an aim to improve them to achieve the desired outcomes, as well as to reinforce key lessons and desired skills.

**Objectives:**

- Identify what has worked and not worked in relation to the coaching sessions.
- Discuss challenges and proffer solutions.
- Outline how best to improve and achieve the desired outcome from the coaching sessions.

**Procedure:**

1. Ask participants what they have learned so far from all the lessons.
2. Review all topics above.
3. Identify and write down where gaps exist in HAC capacity.
4. Ask participants how they will use lessons learned to improve the HAC work.
5. Provide coaching or mentoring and provide clarification.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Presentation, question and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Review all topics above and administer posttest (written or verbal responses that are scored).

# Lesson 8: Proposal Writing

## Session 1: Writing a Proposal to Secure a Grant

**Session overview:** This session summarizes the proposal process, including the definition and importance of proposal writing. Participants will learn important steps in applying for grants, including reviewing examples of application templates, using effective language, meeting deadlines, and ensuring completeness. Using a practical walkthrough of a grant template, participants will gain practical experience in addressing each aspect of proposal writing to maximize their chances of success.

### Objectives:

- Define a grant and a proposal.
- Know how to apply for a grant (e.g., answering calls for proposals, completing the application, choosing a language to use, meeting application deadlines, gathering supporting documents, and ensuring application is complete).

### Procedure:

1. Ask participants if they have ever been involved with proposal writing and if they have, ask them to share their experiences.
2. Write down their responses on a piece of paper.
3. Discuss the lesson.
4. Ask questions and listen to participants' responses.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 1 hour.

**Facilitator's note:** Facilitate the key discussion points below.

A **grant** is money given by an organization to an individual or another organization to solve a problem. Grants are awarded for specific reasons (e.g., to support specific activities in education, health, research) and are non-payable funds provided by entities. A **proposal** is a plan or idea to solve a problem.

- How do you apply for a grant?
  - Research available and relevant grants.
  - Review the identified grants carefully.
  - Prepare a grant application aligned with the program, goals, objectives, and so on.
  - Prepare relevant grant documents.

- Carefully complete and review the application to provide exact information.
- After completing the grant form, submit the application.
- Follow up to make sure the application was received.
- Wait for a decision from the grant donor.
- If the donor gives you the grant, manage and document the grant appropriately.
- How do you complete the application template and call for proposal?
  - Carefully read the questions and follow instructions.
  - Make sure you understand each question and answer each exactly, following the guidelines or rules provided.
  - Do not use too many big words that may confuse those reading the application.
  - Review answers or ask another person to review them.
  - Submit the application on time.
- What kind of language should be used?
  - Use language that is easy to understand (e.g., simple words and phrases).
  - Be exact, to the point, and convincing.
  - Provide detail and examples (e.g., data, statistics, evidence).
  - Make sure all information is correct.
  - Use positive language (e.g., “our organization remains committed,” “we understand the importance”).
- How do you meet the application deadline?
  - Know the deadline for the application, and start it early.
  - Create a timeline to complete each part of the application (e.g., filing the document, answering the questions, reviewing answers).
  - Seek help early if needed (e.g., identify a reviewer).
  - Review the application to ensure all materials are prepared, all questions are properly answered, all required documents are attached, and so on.
  - Aim to submit your application well before the deadline, if possible.
- What are the qualities of a good proposal?
  - Clear objectives.
  - Clear outline of the plan to achieve the objectives.
- What is the importance of identifying skills to support a proposal?
  - Depending on the focal area, special skills may be needed (e.g., health advocacy skills differ from skills needed in land advocacy).
  - Skills help engage every member of the HAC to contribute to one or more deliverable.

Discuss the following case study on proposal writing.

Mr. David is the executive director of the HAC in Mega Village. After deciding to respond to a call for a proposal, Mr. David started by asking people outside and within the organization to

research the proposal. He then set up a team and defined the roles and responsibilities of each member. The team developed a proposal using their different skills, and they worked together to identify goals, objectives, activities, and prioritized groups. The completed proposal outlined exactly the way they wanted to achieve this goal collectively as a team. The HAC won the grant from the donor. Mr. David then assigned each HAC member to the right position to implement the project. The project was successful because everyone involved understood the goals, and the donor was happy with the project result.

Key discussion points:

- What did you learn from this story?
- What did Mr. David do that helped the HAC win the project?
- What made the donor happy about the project result?

Administer post-test on proposal writing and sustainability. Decide whether to use written or verbal responses that are scored.

## Session 2: Where to Find Grants and Calls for Proposal

**Session overview:** This session focuses on different ways to search for grants and calls for proposals, including where to locate them and search techniques. It also explains the grant-seeking process.

**Objectives:** Know how and where to search for calls for proposals.

**Procedure:**

1. Ask participants for their experience in searching for grant and any sites they used to locate grants.
2. Write their responses on a piece of paper.
3. Discuss the lesson.
4. Ask questions and write down answers.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 1 hour.

**Facilitator's note:** Facilitate the key discussion points below.

- How to search for a call for proposal:
  - Start by using search engines like Google to look for grants or calls for proposals related to your field or area of interest.
  - Visit websites that publish grant opportunities (e.g., HR Job Liberia, Relief Web, UN Job

Liberia).

- Join professional bodies such as the Civil Society Network and attend partnership meetings.
- Check government agencies (e.g., Ministry of Health, Ministry of Agriculture).
- Follow relevant organizations and funding agencies (e.g., USAID, World Health Organization, UNICEF, United Nations Development Programme).
- Areas to search for a call for proposal:
  - Liberia HR job board.
  - UN jobs.
  - Relief Web.
  - Civil society meetings.

# Lesson 9: Sustainability

## Session 1: Recruiting New Members and Managing Talent

**Session overview:** This session teaches HAC members how to recruit new members and manage their skills to sustain the group.

**Objectives:**

- Demonstrate skills in recruiting new members.
- Describe how to manage members' talents and skills.
- Explain how to take full ownership of the group.

**Procedure:**

1. Ask participants to define organization sustainability.
2. Write down their responses. Allow other participants to ask questions or seek clarification.
3. Discuss the lesson.
4. Ask questions and write down answers.

**Preparations:** Copies of coaching booklet, name tag, pen.

**Materials:** Training booklet, marker, poster sheet, paper, tape.

**Session type:** GLOW Coaching Session.

**Time:** 1 hour.

**Facilitator's note:** Facilitate the key discussion points on developing strategies to recruit new members.

- Recruiting new HAC members requires a thoughtful approach that aligns with the organization's goals and objectives. The following steps should guide HACs as they recruit new members:
  - Consider the skills, experience, and qualities that would help the HAC.
  - Engage members of the community to identify interested people willing to work with the HAC.
  - Network with social groups in the community to advertise the recruitment process.
  - Create opportunities for volunteerism.
  - Use new members' skills and talents to improve effectiveness of the HAC.
- Manage members' talents and skills:
  - Identify and develop talents and skills to help achieve HAC goals.
  - Identify members' strengths and weaknesses.
  - Set a clear goal for everyone, including the HAC and individual members.

- Provide training and development opportunities to improve each member's skills.
- Assign duties based on skills and talent.
- Provide regular mentorship.
- Evaluate each member's work.
- Recognize each member's performance using evaluation results.
- Encourage teamwork.
- Take full ownership of the HAC:
  - Encourage all members to participate in decision making for the HAC.
  - Create and take advantage of opportunities to play leadership roles.
  - Encourage members to take ownership of a specific project, program, or activity.
  - Provide opportunities for members to support the HAC with their time, resources, and talents.
  - Openly share information about finances and activities with members.

## Session 2: Managing Conflict and Engaging All HAC Members Productively

**Session overview:** This session discusses conflict management, the different types of conflict management, the steps involved in conflict management, and the skills required to manage conflict among HAC and promote effective teamwork.

### Objectives:

- Understand the definition and types of conflict management.
- Know the skills and steps involved in conflict management.
- Define effective teamwork.

### Procedure:

1. Ask participants about their understanding of conflict.
2. Discuss the lesson.
3. Ask questions and write answers.

**Preparations:** Copies of coaching booklet, nametags, pen.

**Materials:** Training booklet, marker, poster sheet, paper tape.

**Session type:** GLOW Coaching Session.

**Time:** 1 hour.

**Facilitator's note:** Facilitate the key discussion points below.

- Definitions of conflict management:
  - Identifying, discussing, and resolving disagreements or disputes among individuals,

groups, or organizations.

- A procedure to resolve arguments or misunderstandings.
- The process of handling disagreements.
- Types of conflict management:
  - Collaboration (i.e., working together to find a solution).
  - Compromise (i.e., all sides agree to terms to end the dispute).
  - Accommodation (i.e., one party allows the other to “win” without getting anything in return).
  - Avoidance (i.e., all parties ignore the conflict).
  - Mediation (i.e., a third party helps all sides reach agreement).
- Steps of conflict management:
  1. Recognize the conflict exists.
  2. Take time to understand the intention of the parties involved in the conflict.
  3. Open honest communication between the parties involved.
  4. Identify common interests.
  5. Brainstorm ways to address the conflict.
  6. Facilitate negotiation between the conflicting parties.
  7. Reach an agreement.
  8. Take action and follow up to make sure the agreement takes effect.
- Teamwork refers to joint efforts toward a common goal. To encourage effective teamwork, HACs should do the following:
  - Make sure all members understand and agree with the HAC’s goal and vision.
  - Ensure all members have a clear role and responsibility.
  - Encourage open communication among team members by providing communication channels.
  - Ensure respect and trust among team members.
  - Make sure active conflict resolution strategies are in place.
  - Celebrate success among team members.
  - Ensure accountability.

# Lesson 10: Recap and Experience Sharing

**Session overview:** In this session, participants will review lesson 7 to lesson 9. Information will be reinforced and knowledge gaps addressed.

**Objectives:**

- Review lessons 7–9.
- Ask questions to identify knowledge gaps.
- Conduct posttest to understand participant knowledge gained.

**Procedure:**

1. Ask participants if there is anything they do not understand.
2. Write down participant responses.
3. Ask other participants if they can provide clarification.
4. Provide further clarification as needed.

**Preparations:** Review and get familiar with coaching booklet on leadership.

**Materials:** Paper and booklet.

**Session type:** Small group exercise, presentation, question and answer session, and discussion.

**Time:** 45 minutes.

**Facilitator's note:** Review the key discussion points below.

- What is effective leadership?
  - Who is a good leader?
  - Who is a bad leader?
  - What are the benefits of a good leader?
  - What are the disadvantages of a bad leader?
- What is a CSO?
  - How does the CSO function? What are the CSO structures?
  - What are the requirements for a CSO?
  - What are the different levels of CSO work?
  - How do you transition to an independent CSO?
  - Describe coordination and collaboration with other CSOs.
- How do you sustain a CSO?
  - What is the importance of keeping documentation?
  - What is the importance of holding regular meetings?
  - What is the importance of paying dues?

- How do you mobilize resources to fund the HAC work plan?
  - What are resources?
  - Identify different resource types (e.g., cash, in-kind) and how to use them.
  - How do you identify the kind of resources each HAC needs?
  - Why is it important to link resource mobilization to the HAC work plan?
- How do you develop and manage a budget?
  - What are the different parts of a budget?
  - How do you link the budget parts to the work plan?
  - What qualities are needed to manage the budget?
- How do you leverage HAC members to benefit the overall resource mobilization effort of the organization? How do you recruit new members and manage talent?
- How do you write a proposal to secure a grant?
  - What is a grant?
  - What is a proposal?
  - How do you apply for a grant?
  - Where can you find a grant or call for proposal?
  - How and where do you search for calls for proposal?
- What is organizational sustainability?
  - What are the strategies to recruit new members?
  - How can you manage members' talents and skills?
  - How can you encourage members to take full ownership of the group?
- How do you manage conflict and engage all HACs members productively?
  - What is conflict management?
  - What are the types of conflict management?
  - What are the steps of conflict management?
  - How can you leverage members' conflict management skills?

Case study and scenario on a successful CSO.

In Thuo Town, the HAC transitioned to a CSO under the leadership of Mrs. Korpo Wah. Mrs. Korpo was a good leader who wanted to grow the organization and make it more vibrant. She worked with the HAC to ensure everyone had a voice in decision making. She also shared information to make sure everyone was part of building the organization. Mrs. Korpo promoted the organization among donors and other partners by actively attending all county- and district-level coordination meetings and linking the group to other CSOs to obtain support for their work. Mrs. Korpo worked with her team members to respond to calls for proposals, and when a grant was won, she involved all HAC members in planning and implementing the project. Under her leadership, all projects were successfully implemented. Donors were always satisfied because the whole team worked together with one vision and goal.

When conflicts occurred between HAC members, Mrs. Korpo included other leaders in the group to resolve the issues using their knowledge and skills. Her effective leadership helped the organization to grow, and new members joined. They even built their own office in Thou Town.

Key discussion points:

- What did you learn from the story?
- What did Mrs. Korpo do to have all members of the team working towards the growth of the organization?
- What did she do to make the donor happy?
- List some things that make this CSO strong.