

Inventory of existing Funding & Resourcing structures

To gain an understanding of the different services and decision-making processes of your organisation

Before you start

- 1 Understand the municipality's structure
- 2 Understand what type and range of funding might be required for implementing your Action Plan
- 3 Consult with senior colleagues at your municipality who can help you identifying the right people to engage with for this task
- 4 Find some close collaborators, team members who can support you in the entire process
- 5 Encourage your stakeholders to do an Inventory check themselves for their organisation

To go further

iPestle to help understanding the local conditions and local stakeholders' and what challenges they may be facing

It is crucial to understand how your own organisation works in terms of funding and resourcing before starting to look for resources elsewhere. Highlighting the interconnections between the various funding and resourcing services, processes and departments within your municipality will be useful to identify their potential role in your search for funding.

This task follows a systemic approach and involves making an inventory of the funding and resourcing structures and relevant processes that exist within your municipality (i.e. your assets).

It consists of three tools:

- 1) A checklist of what you need to know about the finance and funding assets and processes at your organization/municipality
- 2) A SWOT-diagram permitting the analysis of the available funding assets.
- 3) A matrix to identify potential finance and funding capacities across different departments and/or partner organisations.

How to use it?

Step 1 Make a basic inventory of the structures and services of your municipality regarding project finance and funding of resources. Identify and interview some senior members of staff to gain a good understanding of what the relevant positions and services are that deal with project costing and sourcing of funding at your organisation (**Tool 1 - Inventory Checklist**).

Step 2 Organise a one hour focus group with relevant colleagues for analysing the funding and resourcing assets and decision making processes that exist within the municipality and in relevant departments. Analyse the functioning and efficiency of these services and structures by highlighting their strengths, weaknesses, the opportunities and threats they involve (**Tool 2 - SWOT diagram**). Include in this analysis each unit/department of your organisation that relates to the funding and resourcing of your Action Plan

Step 3 Summarize all your findings and fill in the Inventory matrix (**Tool 3 - Matrix**). Create a clear map of the finance and funding processes at your organisation that you/your team will have to follow when designing and implementing your Funding Strategy (ML 2).



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1. Inventory Checklist

It will help you to gain a clear and detailed understanding of who is doing what in your organisation terms finance and funding. This includes assets such as Funding Officers, staff experienced in writing funding applications, existing information systems on funding sources, memberships and subscriptions to relevant information sources, etc..

1. Identifying funding opportunities and sources for project funding
1.1 Does my organisation have a department or staff responsible for the sourcing of funding?
1.2 Does my organisation have an existing map or database of funders or funding sources?
1.3 Who monitors external funding sources in my organisation to identify project funding opportunities?
1.4 How is the funding mix of a project decided?
1.5 What are the most common funders and funding sources that my organisation has used in the past?
1.6 What types of funding sources are used by my organisation? (EU funding, domestic public sector or funding programmes, NGOs funding, donations, fundraising, social bonds, volunteers etc.)
2. Budgeting and approving of projects
2.1 What is the usual process from project idea to project implementation in my organisation?
2.2 Does my organisation have a finance department or finance officer who deals with project finance?
2.3 Who is in charge of designing project costings/budgets and staff time allocations?
2.4 Who is in charge of approving project costings and budgets?
2.5 What are the procedures to include a project in the annual budget of my organisation (what are the next deadlines)?
2.6 Who is included in the decision-making process of annual budgets and approving the funding for projects?

2. SWOT Analysis

Strengths	Weaknesses
Opportunities	Threats

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3. Inventory matrix

A matrix to identify potential finance and funding capacities across different departments and/or partner organisations. This will help you to focus on a departmental and / or partner perspective, i.e. mapping the existing finance and funding structures by units/partners and how they could facilitate project finance and funding activities for your Action Plan.

Name of the service/Department or partner Organisation	How are their activities linked to your Action Plan?	What project are they Currently planning to implement that relate to your Action Plan?	Who is involved in sourcing funding for their projects?	Who is involved in designing the cost/budget of their projects?	How relevant are they for your Action Plan? 1-5	Are they open to collaborate? 1-5	Do they have capacity / time to support your Action Plan? What can they do for you?