COUNCIL OF DELEGATES
OF THE INTERNATIONAL RED CROSS
AND RED CRESCENT MOVEMENT

Antalya, Turkey
10–11 November 2017

Movement-wide Principles for Resource Mobilization

BACKGROUND REPORT

Document prepared by the International Committee of the Red Cross and the International Federation of the Red Cross and Red Crescent Societies in consultation with the National Red Cross and Red Crescent Societies

Geneva, September 2017
EXECUTIVE SUMMARY

This report provides background to Resolution 6 (CD/17/R6) on the principles for resource mobilization of the International Red Cross and Red Crescent Movement (Movement). It highlights the activities that have been carried out in the nearly two years since the adoption of the Movement logo in December 2015, which prompted this process.

Following the adoption of the Movement logo, the International Federation of Red Cross and Red Crescent Societies (IFRC) and the International Committee of the Red Cross (ICRC) worked extensively with National Red Cross and Red Crescent Societies (National Societies) to develop a vision, goals and principles to help Movement components maximize their fundraising potential, individually and collectively, in a spirit of collaboration and good partnership.

The vision, goals and principles are all set out in Annex 1 of the resolution. Annex 2 presents a business case for three deliverables that the ICRC, IFRC and National Societies came up with for helping the Movement maximize its fundraising potential. Provided the resolution is adopted as expected, these strategic initiatives will provide practical solutions to help Movement components coordinate their fundraising effectively and develop their capacity to mobilize sufficient resources, thereby enabling the Movement to respond to the needs of people in crisis. The strategic initiatives are the following:

- **developing a virtual fundraising hub** to coordinate capacity-development initiatives and improve coordination in Movement fundraising in general, share best practice in fundraising, and facilitate and coordinate the learning and development of fundraising staff within the Movement;
- **improving the Movement’s access to and analysis of strong fundraising data** to underpin strategic decision-making in resource mobilization;
- **creating an investment fund** to support growth and development in fundraising specifically.

A series of leadership and technical consultations and a survey of National Societies showed that, overall, National Societies are supportive of the ideas in the vision, goals and principles and agree that the three deliverables are a good way to support the coordination and development of fundraising.

In its conclusions, this report formulates a series of recommendations to the ICRC, the IFRC and National Societies for implementing the Movement-wide vision, goals, principles and associated deliverables for resource mobilization.
1) INTRODUCTION

We live in a world where armed conflicts, natural disasters and other emergencies create an ever-widening gap between people’s basic needs and available resources.¹ Never has the collective work of the Movement been so important. And yet, our income as a Movement is not increasing sufficiently to respond to growing needs.

The Movement needs a strong and sustainable income base both locally and globally to ensure that services can continue to be delivered. Each component of the Movement must therefore work together in a spirit of collaboration and good partnership, supporting other components by maximizing their fundraising potential. Many National Societies are strong and financially secure, and others have taken and continue to take important steps to develop their own strategic funding capabilities. But some National Societies do not strategically invest in fundraising operations or in recruiting professional fundraising staff and thus fail to maximize their fundraising potential. And a significant number face serious difficulties in meeting humanitarian needs due in large part to their low capacity to mobilize resources sustainably. Globally, there is limited access to the data needed to identify growth opportunities (be they in specific markets, technologies or products) and inform strategic investment decisions.

Policy and practice in the wider humanitarian and development sector is influencing the Movement’s desire to work better together. Increasing competition in private-sector fundraising – particularly global growth in individual giving through strategic investment and high levels of coordination on professional fundraising among UN agencies and international non-governmental organizations – is putting pressure on National Societies to position themselves effectively with donors. The Grand Bargain commits donors and aid organizations to make several changes to their working practices to improve efficiency. These include a commitment to provide more funding for national and local responders. With its community-based presence in 190 countries, the Movement is the largest humanitarian network in the world. We therefore have the national and local capacity to fulfil this commitment. Moreover, we need strong National Societies that can generate funding and mobilize resources sustainably to ensure that the Movement and its individual components can deliver on its humanitarian mission in the future.

This report on the Movement-wide principles for resource mobilization highlights the consultations and other activities that have been carried out, and the resulting progress and outcomes, in the nearly two years between the adoption by the Council of Delegates of Resolution 2 (CD/15/R2) on the Movement logo in December 2015 and the presentation of the Movement-wide principles for resource mobilization at the Council of Delegates in 2017.

2) BACKGROUND: FROM THE ADOPTION OF THE MOVEMENT LOGO TO THE MOVEMENT-WIDE PRINCIPLES FOR RESOURCE MOBILIZATION

Issues faced by Movement components in resource mobilization, and steps taken to address them, were first addressed in the Federation-wide resource-mobilization strategy, which was approved by the IFRC’s Governing Board in 2011. The IFRC’s strategy set out to:

- maintain leadership in resource mobilization for emergencies;
- grow non-emergency income for international and domestic work;
- increase the resource-mobilization capacity of National Societies.

Activities to implement it are ongoing. In order to build on the successes and progress made under the IFRC’s resource-mobilization strategy and include all the components of the

¹ The High-Level Panel on Humanitarian Financing’s report to the Secretary-General of the UN, Too Important to Fail: Addressing the Humanitarian Financing Gap, estimates this gap to be USD 15 billion.
Movement, the process began to create a Movement-wide vision, principles and deliverables. There have also been several Movement initiatives recognizing the need to improve cohesion and coordination in resource mobilization, and to support National Societies in strengthening their overall organizational capacity, outlined below:

Resolution 1, “Strengthening Movement coordination and cooperation (SMCC): Optimizing the Movement’s humanitarian response” (CD/15/R1), objective 7, calls on the Movement to: “[pursue] a coherent and complementary approach to resource mobilization in large-scale emergencies” and, in operative paragraph 9, emphasizes that: “[a] Movement-wide approach to resource mobilization should be built on complementarity and non-competitiveness, meaning intra-Movement competition is avoided”.

Resolution 6, “International Red Cross and Red Crescent Movement Branding Initiative” (CD/13/R6), preambular paragraph 4, takes note of the IFRC Governing Board’s decision to “develop rules for a possible Movement logo and initiate a discussion on a Movement-wide framework for resource mobilization”. In response, Movement components presented Resolution 2, “International Red Cross and Red Crescent Movement Branding Initiative: Adoption of the International Red Cross and Red Crescent Movement logo” (CD/15/R2) to the Council of Delegates in December 2015. This resolution aims to ensure the Movement can, exceptionally, use the Movement logo to maximize its “visibility, positioning and fundraising in support of the humanitarian work of the Movement and the people it serves”. The resolution further recognizes “the importance for the Movement and its components of enhancing their collaboration on resource mobilization and further leveraging their fundraising potential, as a whole and individually, for the benefit of the vulnerable people and communities they serve”. Operative paragraph 6 “commits the Movement components to demonstrating their collective leadership with a view to maximizing the Movement’s fundraising potential in a spirit of collaboration and good partnership, and calls upon the ICRC and the International Federation to pursue an inclusive process with National Societies for the development of Movement-wide principles for resource mobilization, which are to be submitted for adoption at the Council of Delegates in 2017”.

This commitment was sought to ensure that the Movement addresses the lack of global strategic direction for resource mobilization, which is resulting in money “being left on the table”. Those involved in the branding initiative and development of the Movement logo also recognized the benefits of having a global strategy. Other major agencies continue to grow their fundraising income and market share at the expense of the Movement at a local and global level. The Movement-wide principles for resource mobilization were developed in response. They propose to clarify how a Movement-wide system for resource mobilization could function in practice, and how we can ensure that we focus on competing with others in the humanitarian and charity sector and not with each other. The call to find ways to maximize the Movement’s fundraising potential also aimed at finding ways to build on the strengths and comparative advantages of individual Movement components and respect each component’s unique role and mandate.

Throughout 2016 and 2017, Movement components worked together to develop a concept for the forthcoming Red Cross and Red Crescent investment fund. It aims to strengthen local action in the event that a global response to crisis is needed. The creation of this fund is an acknowledgement that, while many National Societies are strong and stable, others are far from reaching their potential. Further investment and support are needed to ensure that National Societies become and remain sustainable, independent humanitarian actors that are recognized and trusted in their communities and seen as reliable partners for the delivery of principled and effective humanitarian action. It is important that initiatives presented to support investment in fundraising are aligned with the wider aims of the forthcoming Red Cross and Red Crescent investment fund, given that development of and investment in resource-
mobilization capacity is an important part of ensuring the financial sustainability of National Societies in the context of their overall organizational development.

It is in the context of the above initiatives that the Movement components consulted widely with National Societies to develop the Movement-wide principles for resource mobilization and their associated deliverables. They focus on stronger coordination and National Society capacity development and investment. A reference group was established, and informal and formal consultations were held.

An invitation to participate in the reference group was sent to all National Society secretaries on 15 April 2016. The first meeting was convened on 8 June 2016, the second in November 2016, and the third in April 2017. The ICRC, the IFRC and 17 National Societies of the 33 members attended the face-to-face meetings. Teleconferences were held after each reference group meeting to ensure those unable to attend could remain updated and provide input. The group focused on:

- identifying a shared vision and mission for fundraising across the Movement;
- developing Movement-wide principles for resource mobilization;
- proposing Movement-wide capacity-development initiatives: new areas of investment and innovative approaches to bolster National Societies’ resource-mobilization capabilities in their local markets (complementing the ongoing work under the IFRC’s resource-mobilization strategy).

TECHNICAL CONSULTATIONS

The technical consultations brought together leaders and fundraising experts from National Societies, the ICRC and the IFRC to ensure that the process was inclusive, to help inform the content of the Movement-wide vision and principles and the new initiatives for capacity development. These initiatives, or deliverables, developed by the reference group, are:

- developing a virtual fundraising hub to coordinate capacity-development initiatives and improve coordination in Movement fundraising in general, share best practice in fundraising, and facilitate and coordinate the learning and development of fundraising staff within the Movement;
- improving the Movement’s access to and analysis of strong fundraising data to underpin strategic decision-making in resource mobilization;
- creating an investment fund to support growth and development in fundraising specifically.

A meeting of the working group was convened in Geneva in March 2017. During the two-day workshop, participants were asked: to give a preliminary description of the underlying thinking and reasoning behind each initiative; to design the initiative, determine its scope and model it; to draw up a business case and initial summary of the financial and other resource implications as well as proposed solutions or scenarios; and to plan the entire project including the timeline, scale, milestones and process for implementation for three years beyond the 2017 Council of Delegates.

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2 Africa: Cote d’Ivoire, Ethiopia, Ghana, Kenya, South Sudan; Americas: Canada, Colombia, Costa Rica, Jamaica, Mexico, the USA; Asia and the Pacific: Australia, China, Japan, New Zealand, South Korea, Thailand, Viet Nam; Europe and Central Asia: Azerbaijan, Denmark, Germany, Ireland, the Netherlands, Norway, Spain, Switzerland, Turkey, the UK; Middle East and North Africa: Egypt, Iran, Iraq, Lebanon, Qatar.
Additional technical consultations on the Movement-wide vision, principles and deliverables for resource mobilization were held at the following events:

- International Fundraising Skillshare, London, September 2016, attended by 250 fundraisers from more than 50 National Societies;
- Asia Pacific Fundraisers Network, Seoul, March 2017, attended by 73 fundraisers from 26 National Societies;
- Nordic Skillshare, Stockholm, March 2017, attended by 130 fundraisers from five National Societies;
- Eastern Europe and Central Asian Fundraising Skillshare, Budapest, June 2017, attended by 36 fundraisers from 19 National Societies;
- European Public Support Group meetings in Berlin (October 2016) and Barcelona (May 2017), attended by the communications and fundraising directors of 23 National Societies.

LEADERSHIP CONSULTATIONS

The ICRC and the IFRC updated and consulted National Society leaders throughout the process, including during the following events:

- Pan-African Conference, Abidjan, April 2017;
- Eastern Europe and Central Asia leadership meeting, Almaty, May 2017;
- IFRC Governing Board meeting, Geneva, May 2017;

SURVEY OF NATIONAL SOCIETIES

In early discussions at both the leadership and technical meetings, the ICRC and the IFRC were encouraged to conduct a survey of National Societies in order to understand the issues that the proposed Movement-wide vision, principles and deliverables for resource mobilization were seeking to address, and to determine whether National Societies agree with the solutions identified by the reference group to help the Movement maximize its fundraising potential.

The survey had three main aims:

- ensuring that the consultations with National Societies on the draft Movement principles for resource mobilization and the three associated initiatives (developing a virtual fundraising hub, investing in fundraising, and collecting and using strong fundraising data) were inclusive;
- ensuring that the three initiatives were designed in a way that reflected both the work of National Societies in their domestic fundraising contexts and the work of Movement components in global resource mobilization;
- informing future work in global resource mobilization, following the Council of Delegates in 2017.

The survey, containing 25 open-ended and closed questions, was available online, or offline in Word format, and in five languages, (Arabic, English, French, Russian and Spanish). The ICRC and the IFRC emailed all the National Society secretary-generals to inform them about the survey and request that it be completed by senior leaders and promoted through technical fundraising and field operational channels. The survey was available online for a period of five weeks, from 29 March to 28 April 2017.
A total of 93 completed responses were received (67 in English, 11 in French, 7 in Spanish, 4 in Russian and 4 in Arabic). This represents 49% of all currently recognized National Societies (190). The sampling strategy established for the survey was to aim for a 30% response rate (i.e. responses from 56 National Societies) from all geographic regions to ensure that the survey was representative. This was exceeded in all regions, as illustrated in the following table.

<table>
<thead>
<tr>
<th>Region</th>
<th>No. of recognized National Societies per region</th>
<th>No. of responses aimed for</th>
<th>No. of responses received</th>
<th>% of recognized National Societies that responded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>49</td>
<td>15</td>
<td>21</td>
<td>43%</td>
</tr>
<tr>
<td>Americas</td>
<td>35</td>
<td>10</td>
<td>16</td>
<td>46%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>35</td>
<td>10</td>
<td>17</td>
<td>49%</td>
</tr>
<tr>
<td>Europe and Central Asia</td>
<td>53</td>
<td>16</td>
<td>30</td>
<td>57%</td>
</tr>
<tr>
<td>Middle East and North Africa</td>
<td>18</td>
<td>5</td>
<td>9</td>
<td>50%</td>
</tr>
<tr>
<td>Total</td>
<td>190</td>
<td>56</td>
<td>93</td>
<td>49%</td>
</tr>
</tbody>
</table>

3) ANALYSIS / PROGRESS

VISION, GOALS AND PRINCIPLES

Despite promising gains in the implementation of the IFRC’s resource-mobilization strategy, which aimed to improve cooperation among National Societies and build their capacity in resource mobilization, the Movement is falling short. We are struggling to increase our income sufficiently to be able to respond to growing needs. We are also “leaving money on the table” because we do not have a shared vision and do not collaborate and coordinate enough: “Trust, acceptance and respect for strengths are key for successful collaboration to alleviate the suffering of people in crisis,” said one National Society secretary-general at the first reference group meeting.

The Movement-wide vision, goals, principles and deliverables for resource mobilization were designed to help Movement components to address these issues individually and collectively.

The vision states our intention to work together to be leaders in local and global resource mobilization, enabling us to maximize our global reach and fulfil our humanitarian mission. The vision touches on the importance of fundraising for the future, ensuring we can continue to respond to humanitarian needs, wherever they may be. Finally, the vision recognizes the importance of Movement components working together to provide high levels of stewardship for partners, supporters and donors.

The goals were drafted to directly complement those in the IFRC’s resource-mobilization strategy: being leaders in local and global resource mobilization for humanitarian work; mobilizing the power of humanity, particularly during emergencies, enabling partners and supporters to provide help to those most in need; and ensuring individual and collective financial sustainability in a spirit of solidarity and good partnership, thus recognizing that the Movement is stronger together than the sum of its parts.

The principles highlight the importance of:

- maximizing income to achieve the goals and fulfil the vision;
• working in solidarity and good partnership;
• recognizing the unique roles and mandates of Movement components and what that means for resource mobilization;
• taking a cooperative and effective approach to fundraising and committing to building National Societies’ capacity to mobilize funds.

Overall, National Societies were supportive of the themes covered by the vision, goals and principles. In their responses, the majority of respondents agreed or strongly agreed that the themes were appropriate. The strongest agreement was with the themes “It is important to fundraise in a way that is accountable to donors and to the communities we serve”, with 97% or 90 National Societies agreeing or strongly agreeing, and with “It is important to support National Society fundraising capacity development”, with 97% or 91 National Societies agreeing or strongly agreeing.

**Q2. The Movement components have committed to developing Movement-wide principles for resource mobilization with a view to maximizing fundraising potential. To what extent do you agree or disagree with these themes?**

- **Fundraise in a way that is accountable to donors and to...**
  - Strongly agree: 82% (76)
  - Agree: 15% (14)
  - Neither agree nor disagree: 2% (2)
  - Disagree: 1% (1)
  - Strongly disagree: 2% (2)

- **Support National Society fundraising capacity development**
  - Strongly agree: 77% (72)
  - Agree: 20% (19)
  - Neither agree nor disagree: 1% (1)
  - Disagree: 1% (1)

- **Fundraise in a way that is driven by need**
  - Strongly agree: 56% (52)
  - Agree: 35% (33)
  - Neither agree nor disagree: 6% (6)
  - Disagree: 2% (2)

- **Invest in fundraising in order to grow**
  - Strongly agree: 55% (51)
  - Agree: 43% (40)
  - Neither agree nor disagree: 2% (2)

- **Maximize income**
  - Strongly agree: 55% (51)
  - Agree: 42% (39)
  - Neither agree nor disagree: 2% (2)
  - Disagree: 2% (2)

- **Work together in solidarity and good partnership**
  - Strongly agree: 52% (48)
  - Agree: 46% (43)
  - Neither agree nor disagree: 2% (2)
  - Disagree: 1% (1)

- **Fundraise in a way that helps to position our brand**
  - Strongly agree: 51% (47)
  - Agree: 47% (44)
  - Neither agree nor disagree: 1% (1)
  - Disagree: 1% (1)

- **Ensure we adopt a principled approach to fundraising**
  - Strongly agree: 49% (46)
  - Agree: 44% (41)
  - Neither agree nor disagree: 6% (6)

- **Maintain a funding dialogue with States**
  - Strongly agree: 41% (38)
  - Agree: 53% (49)
  - Neither agree nor disagree: 6% (6)

- **Fundraise for our individual and collective mission**
  - Strongly agree: 40% (37)
  - Agree: 53% (49)
  - Neither agree nor disagree: 6% (6)
  - Disagree: 1% (1)

National Societies were asked whether they would like to see additional themes included in the principles, to which the majority (73% or 68 National Societies) replied, “No”.

**Q3. Are there additional themes your National Society would like to see included in the Movement-wide principles for resource mobilization?**

- Yes: 27% (25)
- No: 73% (68)
DELIVERABLES

Virtual fundraising hub

The reference group came up with the idea of a virtual fundraising hub as a way of coordinating the resource-mobilization efforts of the Movement components. Movement components can contribute to and get support from the hub. It would aim to provide:

- a centre driving fundraising excellence;
- access to market intelligence;
- help with developing fundraising strategies;
- a platform for sharing best practice and organizational learning.

“The Movement should provide a service that all National Societies can benefit from and something that National Societies will be willing to pay for and support,” said one National Society secretary-general and reference group member.

In researching the feasibility of developing a virtual fundraising hub, the survey asked what National Societies would find most useful in such a hub. Most National Societies answered “best practices”, (89% or 83 National Societies), followed by “access to fundraising training” (86% or 80 National Societies), and “innovative ideas” (83% or 77 National Societies).

<table>
<thead>
<tr>
<th>Q14. What would your National Society find most useful in a global fundraising hub? Select all that apply.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best practices</td>
</tr>
<tr>
<td>Access to fundraising training</td>
</tr>
<tr>
<td>Innovative ideas</td>
</tr>
<tr>
<td>Fundraising products, tools and templates</td>
</tr>
<tr>
<td>Fundraising consultancy expertise</td>
</tr>
<tr>
<td>Market studies</td>
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<tr>
<td>A register of well-trained, globally-mobile fundraisers</td>
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<tr>
<td>Other, please specify</td>
</tr>
<tr>
<td>None of the above</td>
</tr>
</tbody>
</table>

National Societies were also asked what they would be willing to contribute towards a virtual fundraising hub. The majority said staff time (69% or 64 National Societies), followed by technical support (38% or 35 National Societies). A minority (18% or 17 National Societies) said that they would be prepared to provide funding.
Data collection and analysis

As part of the International Fundraising Leadership Forum, the Movement participates in a global fundraising benchmarking exercise called the peer review. For the peer review, fundraising data are collected and analysed annually from the ICRC, the IFRC and National Societies (16 are currently taking part). While the data may not be a representative sample of the Movement's overall resource-mobilization capacity, this limited analysis does illustrate several basic issues and maps trends in fundraising from the data of other participants:

- The Movement does not fully understand its fundraising position due to a lack of data.
- Movement fundraising growth is stagnant: +2% compound annual growth between 2011 and 2015.
- The Movement is losing market share, down from 22% in 2011 to 18% in 2015, while other participants are increasing their market share at the expense of Movement components.

National Societies were asked in the survey if they routinely collect and analyse fundraising performance data to understand the potential for growth and/or to inform investment decisions. Of the 93 respondents, 53 National Societies said they do, suggesting that the Movement can increase the number of participants in the annual data collection and benchmarking initiatives. The 40 National Societies who reported they did not collect and analyse fundraising performance data listed a lack of capacity or resources and weak database and information-management systems as the primary reasons.

At the event “The Power of Humanity in Fundraising”, hosted by the ICRC and the IFRC, Janti Soeripto, Chief Operating Officer of Save The Children International, spoke of the recent transformation in her organization’s fundraising:

We became much more ruthless about data: where are we performing; where are we gaining market share, where are we losing and to whom; how much are we investing and where; who is investing more, where are they investing and what are the results. That gave us a much better picture of what we had to do. That obsession with data is absolutely where you have to start.

Strategic investment in fundraising must be based on robust market and data analysis if it is going to lead to growth. If Movement components systematically collect and analyse fundraising data, it will inform their investment decisions at the local, national and global levels; guide their decisions on making investments in National Societies’ fundraising; and inform

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4 To see the video, please use the password: videoshare
them about their competitors’ performance (by providing benchmarking data), and about potential market opportunities and threats.

Investment in fundraising

It is widely recognized within the professional fundraising sector that strategic investment in fundraising can drive sustainable revenue growth. A comparative study conducted by the International Fundraising Leadership Forum showed that organizations that make coordinated long-term investments in strategic markets show healthy income growth. Those that do not find achieving growth more challenging. Organizations on a growth path take the strategic decision to invest in income growth in countries with opportunities both for absolute growth and for cost-effective growth of sustainable long-term income.

The focus of investments for most organizations is building the base of individual regular private donors who support the organization with an automatic monthly or regular donation. The organizations use a range of different types of investment mechanisms or funds, such as allocating part of their central budget to investment or – for those organizations in a strong financial position – supporting other organizations in their country with growth potential, either via a central body or bilaterally.

Managing the fundraising portfolio and coordinating international decision-making on investing in fundraising lead to more strategic and targeted growth. The organizations achieving good returns and growth are typically those that focus their investments on countries with high-growth and high-value potential. Return on investment is lower when investing in countries that are relatively underdeveloped or when building organizational capacity.

The study also noted that some of the international organizations and international non-governmental organizations underwent cost cutting in parts of their operations while protecting the investments in income growth to ensure the future financial health of their organization.

The following international non-governmental organizations are known to use market-targeted investment for fundraising growth: the UNHCR, UNICEF and Save the Children. Save the Children also operates a fundraising hub, while Amnesty International, MSF and UNICEF each have dedicated global-fundraising-development support staff.
In the survey, National Societies were asked whether they would be interested in receiving a financial investment to develop their fundraising activities. Most responded that they would be interested (81% or 75 National Societies), as shown in the pie chart below.

Q16. Would your National Society be interested in receiving a financial investment to develop your fundraising activities?

- Yes: 81% (75)
- No: 15% (14)
- Other: 4% (4)

4) CONCLUSION AND RECOMMENDATIONS

Building on the successes of the IFRC’s resource-mobilization strategy and the foundations laid down under the Movement Branding Initiative, we have carried out extensive discussions to explore and agree on a vision, goals and principles for resource mobilization designed to help all components to raise the funds they need to carry out their role and fulfil their responsibilities under their individual mandate and the mission of the Movement as a whole.

Through this process, we have recognized that merely having a vision and principles is not enough to transform the Movement’s fundraising. By learning from the sector, analysing the data and listening to those fundraising for the Movement on a daily basis, we saw that it is crucial to first understand our current capacity, strengths and areas of opportunity for growth and then invest in developing the capacity of the Movement in resource mobilization and coordinate effectively to achieve our individual and collective goals.

The reference group and technical fundraisers have proposed practical recommendations for doing so. The specific strategic initiatives to be carried out and reported on to the Council of Delegates in 2019 are:

- **Virtual fundraising hub:** Secure the financing and set up and manage the three key components of phase one: determining the process for collecting and analysing fundraising data, setting up the systems and processes required to invest in fundraising, and coordinating capacity development, including best practice and learning opportunities. Phase two will see the creation of a central repository for fundraising products and programmes, as well as content (e.g. budgets, case studies, proposals, images) from around the Movement. Phase two can commence in early 2020, or earlier if phase one is implemented more rapidly.

- **Data collection and analysis:** All components of the Movement commit to prioritizing the collection and analysis of fundraising data, coordinated by the IFRC and submitted to global international non-government organizational benchmarking initiatives. This data will provide the foundation for evidence- and insight-based Movement-wide strategic decision-making in fundraising. Through data, the Movement will understand relative strengths and weaknesses and find opportunities in both domestic and global markets. The central data repository will ensure that the Movement can confidently assess what its key financial metrics are in fundraising, including the overall income...
and expenditure for each National Society. The data will be broken down into: public, private, government, other Movement components, sales (goods/commercial), sales (services/charitable). It must be tracked for at least three years to be used effectively in analysis.

- **Fundraising investment fund:** A fund will be created to provide seed financing for investment in fundraising development, which will be coordinated by the virtual fundraising hub. It will work with selected National Societies to identify their fundraising potential. The virtual hub will conduct feasibility studies to assess and prioritize investments. It will also provide support for piloting, testing and rolling out initiatives that have been shown to have the ability to create multiple, multimillion-dollar sustainable income streams. The fund’s primary purpose will be to help National Societies develop their capacity and become self-sufficient in resource mobilization. The fund will follow a rigorous set of specific, measurable, objective and time-related criteria, and terms of reference that will include a firm commitment to partnership from both investors and recipients. It will enable the Movement to make the most of fundraising opportunities, and to articulate a clear strategy for income growth for the next three to five years. Opportunities will be identified both proactively and reactively through research and insight, and by soliciting engagement from National Societies. Investment in fundraising will be aligned with ongoing Movement initiatives to invest in National Society development.

5) REVIEW & TIMELINE

The implementation of the Movement-wide principles for resource mobilization and associated deliverables will be conducted in the two-year period following the anticipated adoption of the resolution at the Council of Delegates in November 2017. The ICRC and the IFRC, together with National Societies, will report back to the Council of Delegates in 2019. The anticipated timeline is as follows:

- **2017:** The Council of Delegates adopts the principles for Movement-wide resource mobilization and the deliverables. Financial pledges of support are secured for the following three years. A programme director and members of the programme board are appointed to oversee the implementation of the virtual fundraising hub and the fundraising investment fund.

- **2018:** The hub is set up and scoping of core programmes begins, managed by the programme director and overseen by the programme board. Programme staff are recruited to get the hub operational. Participation in the International Fundraising Leadership Forum peer review is expanded to 40 National Societies (from the current 16 plus the ICRC and the IFRC). Work begins on data collection and analysis, the fund, best practice and learning, in line with the key performance indicators set by the programme board. The board meets in 2018 to review progress and report to Movement “investors”.

- **2019:** Work is scaled up, and more National Societies participate in the peer review. Feedback is given to internal investors on their initial investment, and the investment approach is recalibrated as required. The ICRC, IFRC and National Societies submit a progress report to the Council of Delegates in 2019.

- **2020:** The number of National Societies taking part in data collection continues to grow. Investment in National Society fundraising is scaled up and a large-scale self-financing scheme is developed to make bilateral and multilateral cooperation much easier in future. By 2020 the hub is a recognized global facility for the Movement’s fundraising development. It focuses particularly on contract services, individual giving, innovation, global appeals and high-level philanthropy. A network approach is taken to developing the talent pool, interest groups and shared learning; they support the hub in meeting its objectives.