

ForumCiv
Fundraising Strategy
2020 – 2030
Revised autumn 2021

Approved by Anna Stenvinkel, Secretary General
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1. Introduction

ForumCiv is a Swedish member-based civil society organisation working on a global scale. Our purpose is to strengthen marginalised people around the world who organise to claim their rights and to advocate for changes that contribute to a just and sustainable world. ForumCiv has its Head Office in Stockholm, plus three Regional Offices (in Latin America, Eastern Europe, and South Eastern Africa) and two Country Offices (in Liberia and Cambodia).

ForumCiv's Funders

ForumCiv's funding comes mainly from Sida, including the Swedish Partnership Programme (SPP) and the InfoKom programme that are both run from the Head Office. Sida also funds the Stockholm-based Internship programme, but the funding flows through the Swedish Authority for University Studies (UHR in Swedish).

At the Country and Regional level, the offices and their programmes are currently funded through the EU (Colombia and other parts of Latin America), Sida (Belarus and other parts of Eastern Europe), Sida and EU (Liberia), Sida and the International Labor Organisation (Kenya), and MAC Philanthropies (Cambodia).

The Head Office manages the SPP, InfoKom, and Internship Programme, which means staff in Stockholm develop the applications for funding, oversee programme implementation, prepare the reports, and communicate with the contacts at Sida. Some of the SPP funding covers work that benefits all ForumCiv programmes around the globe, such as developing methods and providing capacity development. Part of the SPP funding also covers a couple of positions in the Regional Offices (mainly under the Quality Support Unit). Overhead generated by SPP also covers some of the core positions both in Stockholm and globally (Finance Controllers) as well as core systems and functions of ForumCiv (Agresso, Sopal, DIRA). The InfoKom funding covers ForumCiv's advocacy and communication work at the Head Office.

The Regional Offices also manage their funding sources, but sometimes with support from the Head Office. Part of the funding that these offices receive are also forwarded to the Head Office in support of overall administrative costs. This is likely to become more of a challenge going forward, since many donors do not want their funds to provide support outside of the region. The Country Offices receive a lot of support in managing their funding sources, particularly to develop proposals and prepare reports but also to ensure proper implementation and partially to maintain contacts with the funder. The Country Offices also forward a small portion of funding to the Head Office for administrative costs but also to cover staff who support the local operations.

Historically, ForumCiv has relied on Sida Civsam funding to exist as an organisation and that remains the case today. InfoKom and the Internship Programme were added in (year?) and (year?) respectively. The Regional and Country Offices have been funded mainly by Sida at the local Embassies or by EU agencies, but also by UN agencies and private foundations. In addition to these funding sources, ForumCiv receives a small amount of funding (% of budget?) through its membership fees and by selling printed materials (?) every year. Individual giving has been explored but only by securing a so called 90-konto and without conducting any

outreach to seek funders. Corporate support has been discussed but there has been no conclusion has been made as to whether and how this might be a viable source of funding for ForumCiv.

ForumCiv's Challenges

ForumCiv went through its organisational change (Going Global) in 2017, which reduced the programme development and fundraising functions in a way that was not effective. The Regional Offices became Hubs and were given added programme responsibilities without the necessary staff resources and the Country Offices were suddenly expected to handle programme development and fundraising on their own. In addition, the new Unit for Impact and Quality Assurance (IQA) did not have a clear assignment or roadmap and could not provide any support for some time. To date ForumCiv remains understaffed for the tasks of programme development and fundraising.

ForumCiv also continues to be over-reliant on funding from one single source; Sida has provided over 90% of ForumCiv's income for many years. ForumCiv does have several different Sida grants, but the largest one (Civsam) accounted for 63% of ForumCiv's income in 2019, covering a large group of staff and several functions that are crucial to the organisation. This creates a great risk and several challenges. At a basic and immediate level, it limits our opportunities for programme development and weakens our position versus the funder. At the big-picture level, all our programs, country offices, and Hubs, and even ForumCiv itself are at risk of close-down if the Civsam funding is significantly reduced or eliminated. (This would be due to a domino-effect where the Head Office closes down first.) In addition, the Country and Regional Offices are continuously seeking funding to keep their programmes going.

Finally, ForumCiv currently has a limited number of staff to carry out the needed work on fundraising. These staff members work on different efforts and also gather together in the Fundraising Committee, to work both on documents and tools that can benefit all fundraising across ForumCiv and on specific fundraising projects. ForumCiv also has limited financial resources to carry out fundraising projects and the organisation therefore focuses on a few projects at a time. This will allow ForumCiv to use its resources in a strategic manner and ultimately build a complete fundraising function for the organization. .

The ultimate goal of the fundraising strategy is to increase the amount of funding ForumCiv secures each year through additional groups of funding (such as foundations and corporate support) and additional funders from existing groups (bi-lateral and multi-lateral funders), with a special focus on unrestricted funds and funds for new and innovative programmes, projects, and tools.

Considering this overall background, ForumCiv needs a fundraising strategy to strengthen its position and increase opportunities for its programming. This strategy is outlined below.

2. Goals of the Fundraising Strategy

As discussed in Section 1 above, ForumCiv has three distinct challenges relating to funding:

1. Since the Sida Civsam funding covers a large portion of our operations, losing this support (or a significant part of it) would mean the organisation itself was under threat.
2. Since Sida is, by far, our dominant funder, our position versus Sida is complicated and our ability to pursue our own goals must include other funders.
3. ForumCiv has not had dedicated staff working on fundraising specifically for several years, and we must build up this function in a strategic step-by-step way.

Challenge #1:

Civsam does not only pay for the largest ForumCiv programme, it also covers a significant part of the organisation's administrative costs. If ForumCiv were to lose the Civsam funding, or if it were dramatically reduced, ForumCiv would have to close down the whole organisation. At this time ForumCiv should focus on working hard to maintain high quality of the Swedish Partnership Programme (SPP) and maintaining a strong relationship with Sida Civsam. As the fundraising function at ForumCiv grows bigger and stronger, it may become possible to address the bigger issue of a potential loss of funding from Civsam.

Challenge #2:

Since Sida provides such large part of our funding ForumCiv is limited in its ability to pursue its own projects and programmes. We have maintained the Sida funding but not broadened our funding sources or developed the capability to do so, but this must now become our focus.

Challenge #3:

ForumCiv has limited resources to put towards developing its fundraising systems and carry out fundraising efforts. In order to be successful in this endeavour, ForumCiv should move forward with a strategic and step-by-step approach. This will include the following:

Goal 1: ForumCiv will identify, evaluate and select the types of fundraising sources that will work for the organisation (such as foundations, corporations, multi-lateral donors, etc.), step by step through July 1, 2024.

Goal 2: ForumCiv will develop the documents and procedures necessary to pursue each selected "types of fundraising source", work on relationship building, and move forward with specific funders as appropriate, step by step through January 1, 2025. (Once established, the documents and procedures will be updated as necessary, and the pursuit of funders will be ongoing.)

Goal 3: ForumCiv will have a complete fundraising function at ForumCiv Head Office, by January 1, 2024.

Annual Action Plans

To reach the above noted goals, ForumCiv will draw up annual action plans for fundraising. These action plans will be based on an assessment of current trends impacting ForumCiv fundraising and of the organisations progress under the Fundraising Goals so far and they will set specific targets for the year.

3. Resources: Financial, Human, Technical and Organisational

Financial Resources

The current funds that can be devoted to fundraising are starting out minimal, which means that we need to work step-by-step to build up our resources. The goal for this effort will be to secure enough funds to establish a full fundraising function in addition to the funds secured for programmes and projects. (See below.)

The Fundraising function will need support from finance staff at the Head Office to adjust the way budgets are developed, and the way funding is tracked so that fundraising and fund reporting become easier.

Human Resources

Having limited financial resources means limited of staff-time to carry out the fundraising work. ForumCiv will therefore start with one staff member at 50% (Fundraising Coordinator) who carries out one or more of the functions identified as primary. .

ForumCiv has established a fundraising committee that can help identify potential new funding sources, develop proposals, and develop the systems for all fundraising efforts. This committee consists of 6 – 8 staff members from the different ForumCiv offices—staff who are experienced in fundraising, or in financial management or communications, and able to support the work both with ideas and through hands-on work. The Secretary General decides who will serve on this committee at least once each year. If necessary, ForumCiv will also secure the expertise of an outside consultant for advice and for specific tasks.

. The Secretary General and the Deputy Secretary General, along with Board Members, will also support the effort by opening doors and holding meetings with potential donors. All job descriptions for Country and Regional Managers will include the item ‘responsible for fundraising’.

Technical Resources

ForumCiv must establish systems and procedures for gathering funding opportunities, tracking donors and donor relationships, documenting and sharing information and learning, and developing a library of data and texts to be used in fundraising. This will include a fundraising data base, which could be simple to start out with (in Excel, for instance) and then may develop into an outside system. The Fundraising Coordinator will be in charge of this

system. In addition, this Fundraising Strategy comes with a set of Tools that can be used to learn about potential funders and funding opportunities.

Organizational Resources

ForumCiv must make sure that we are ready to apply for support from various funders, such as registered with specific entities; pre-qualified for specific applications: completed certain documents for the organization or its leadership, etc. This may also include actions such as broadening the ForumCiv Board membership in order to open up additional venues to potential funders we have not explored before.

4. Methods and Approaches

While there are a great many funders and a variety of funding sources, it is still extremely difficult for many organisations to raise the needed funds. ForumCiv will begin its fundraising effort by choosing the funding sources and funders best suited for our kind of organization, based on our vision and values, our focus on civil society, and our own limited resources for fundraising.

To start out, we will seek funds from bi-lateral funders (such as DANIDA, AusAID, CIDA, etc.) and multi-lateral funders (such as UN Women, UNDP, the EU, etc.). We will also work to expand our foundation funding and the number of foundations who support us. We will also conduct in-depth evaluations of if and how we can approach funders that would be new to ForumCiv, such as seeking corporate sponsors and individual supporters for programmes, projects, events, activities, and/or materials that we produce.

ForumCiv will carry out its fundraising in a non-competitive way with its members organisations and instead share information and knowledge about fundraising opportunities and methods with the members. To start out, this will include providing information on potential funders of member organisations to the membership (as we learn about these) and conducting workshops where the members can learn about fundraising and exchange ideas with each other.

The regular work with fundraising will also include the following:

1. Set annual goals and an annual budget for fundraising, for the Country and Regional Offices, and for ForumCiv as a whole.
2. Develop a job description for the Fundraising Coordinator and a ToR for the Fundraising Committee.
3. Establish a Fundraising Committee and revisit its focus and composition at least once a year.
4. Report on the targets of the annual action plan to the Secretary General quarterly, to discuss progress and make any necessary adjustments going forward.
5. Make fundraising a regular point of discussion during the in-person Global Management Team meetings.

7. Toolbox

At the time of establishing this Fundraising Strategy there are a set of three Tools that can be used to implement the strategy. Existing tools will be updated at least annually, and additional tools will be added as necessary and appropriate.

The ForumCiv Fundraising Strategy will be updated as we develop our fundraising function and expand the scope of our fundraising efforts.
