International Issues News # 34 (November 2013):
The global fundraising strategy 2012-15[1]

1. Introduction

The more funds and supporters AI has, the greater its impact can be. The global fundraising strategy therefore aims to increase AI's total income from €200 million in 2009 to €270 million in nominal terms by the end of 2015.[2] This strategy was published in July 2012 and endorsed by the 2013 International Council Meeting, which recognised that "A stronger, integrated, movement-wide approach will be adopted to supporting fundraising initiatives across the movement, reflecting the criticality of fundraising to the movement's success."[3]

The overall strategy contains five specific goals for the end of 2015:
(a) Annual income in India to be €4.57 million and in Brazil to be €4.08 million.
(b) Existing funded sections in the global south and east to increase income by 29% to €4.07m.
(c) A target to be established and achieved for income growth from international members (there is no such target at present).
(d) The big 5 sections who have significant potential to raise more money (the USA, Germany, Italy, France and Japan) to increase income by an average of 26% to € 83.91 million.
(e) Large and medium sections with strong performance indicators to increase income by 27% to €170.54 million

To achieve these goals, the movement's fundraising strategy is focused on three areas: building a culture of philanthropy[4]; improving our fundraising techniques and skills; and building a stronger fundraising infrastructure across AI. To make progress in these areas, AI needs to move from separate national fundraising strategies and operations to a truly global approach to fundraising, with joint targets, common fundraising materials and messages, and using economies of scale where possible. Equally, AI needs to embed fundraising in its communications and campaigning, and the whole AI movement needs to see fundraising as human rights work. The leading role in helping to achieve this will be taken by the Fundraising Management Team (FMT), a group of senior financial leaders in AI drawn from the International Secretariat and national sections.

2. Strategy and objectives

The FMT has been working together as a relatively consistent group of people for around three years. Its members have been able to identify strengths and weaknesses in AI's fundraising and these analyses have shaped the fundraising strategy. This has 12 objectives grouped under three main headings:

Culture: (1) We need to embed fundraising firmly into the AI culture; (2) to develop a culture of fundraising innovation so that at least 10% of income is derived from 'new' activities; (3) to deliver a set of common 'case for support' materials covering at least 50% of the movement's expenditure; (4) to share best practice so that each section makes at least one significant change to the way they work each year based on learning derived from other sections. Overall AI needs to promote and encourage each section to use all fundraising techniques that are legal, ethical and profitable in their country.

Technical: AI needs to focus on the following four areas to drive sustainable income growth: (5) regular giving: increase the number of regular, monthly givers to AI by 30% and their annual value by 40%; (6) increase global major donor income by 80%; (7) increase global trusts and foundations income by 80%; (8) increase legacy income by 40%. To meet section level benchmarks for each of the four key areas, each section should aim to

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[1] This document is based on *Amnesty International – Global Fundraising Strategy and action plan* (FIN 10/002/2012).
[2] Assuming an annual inflation rate of 2%, this 35% nominal increase is equivalent to about 25% in real terms.
[3] See Decision 1 in *2013 ICM Circular 29: Decisions of the ICM* (ORG 53/006/2013).
[4] See *2013 ICM Circular 11: Fundraising: building a culture of philanthropy (*ORG 50/006/2013) summarised in *International Issues News #30* (July 2013).

achieve: 50% of income from regular donors, 10% from major donors and Trusts and Foundations, and 1% of the donor base to pledge legacy income to AI.

Infrastructure: AI should (9) share learning and best practice amongst all fundraisiers, especially sharing ideas across national boundaries; (10) build the skills and competences of the AI fundraising talent pool and devise a strategy to mobilise their skills more strategically; (11) devise a strategy for an approach to global customer relationship management (CRM) systems, digital tools and analysis; (12) start to address underinvestment in fundraising by the production of a set of investment recommendations from the FMT to the Global Management team (GMT) each year based on FMT's annual review of section's fundraising plans.

The most important of these objectives is the first one, changing AI's culture. It is therefore elaborated in detail in the strategy document. Proposals include taking major donors on AI missions so that they can see for themselves what AI does and what impact it has; including fundraisers on high-level missions to governments so that they have a constant supply of inspiring information to share with donors; and strengthening the understanding of fundraising across AI governance (i.e., national and international boards) so that AI's volunteer leaders give appropriate priority to fundraising in their strategic discussions.

Details are also given for other objectives. For example, under objective (3), the task list includes: investing in photography and audiovisual content suitable for fundraising; producing a global annual review publication which is suitable for major donors and trusts; establishing better ways of showing how AI's money is spent. Under objective (7), tasks include building a Trusts and Foundations Centre of Expertise in AI; to develop the pool of AI staff and activists who have the skills and capacity to approach trusts and foundations; and to ensure that AI's senior leaders are appropriately involved in such approaches.

3. Resources, indicators and evaluation

This strategy requires FMT members to continue to give at least 10% of their time to international work. The FMT will also ask section Heads of Fundraising to complete annual plans and to attend the Annual Fundraising Skillshare. Finally, it may also need to create specific time-limited roles to undertake specific tasks within this strategy. The FMT will also work closely with key campaigns and communications staff to better integrate these functions to ensure that their work is focused and mutually supportive.

FMT reviews performance against this strategy and reports to the GMT every six months. The FMT will also re-evaluate the strategy at its midpoint (ie at the end of 2013) and will reforecast targets as appropriate at this stage.

Key performance indicators (KPIs) have been identified. Each should be reported each year globally, by goal (as listed in paragraph 1 above), and nationally. The KPIs are: number of financial supporters; number of regular givers; cost per new regular recruit; average annual value of regular givers; average retention rate of regular givers; average lifetime value of regular givers; annual global income; number of digital supporters; legacy income; percentage of donor base as legacy pledgers; average legacy value; individual major donor income; trust and foundation income; percentage of income derived from new activity; fundraising staff turnover; re-activation rate (for lapsed members and donors); and increasing value per donor.

International Issues News *is put together to spread updates on AI's international focus to a wider audience worldwide, encouraging more members to become engaged with the issues. The articles are summaries of internal papers which we aim to condense without offering our opinions on the original documents.*

We welcome any comments, questions or suggestions on our choice of documents, the accuracy of the summaries, and how the newsletter could be more usefully developed: please write to ***ii-news@aivol.org****.*

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Note on original documents

These articles are mainly based on internal AI documents from the Weekly Mailings sent out by the International Secretariat. AI sections vary in their practice with respect to making these available to members. If you are interested in finding the original document please investigate within your own Section but feel free to let us know if you are having problems. We can normally supply English-language versions of all documents referenced in these articles.