



## **REPORT ON INITIAL FINDINGS FROM A FUNDRAISING PERFORMANCE REVIEW CONDUCTED FOR WIEGO**

### **Background**

In fall 2006, WIEGO received funding through the Partnership and Business Development Division of the International Development Research Centre (IDRC) to develop a fundraising strategy. Following a call for proposals, IDRC contracted with RD Consulting on WIEGO's behalf for the development of a fundraising strategy to be conducted in several phases. The initial phase calls for a documentation review and interviews with key stakeholders in order to assess WIEGO's current fundraising performance and identify issues that will need to be factored into the development of an effective fundraising strategy for the organization. This report outlines the initial findings from the fundraising performance review and recommends actions to be considered in the drafting of a fundraising strategy for WIEGO.

The recommendations in this report are the opinions of RD Consulting based on a review of available materials, interviews with key stakeholders and further clarification of with the Secretariat staff. Where recommendations were put forward specifically by interviewees, these are noted in the report.

Our emphasis in this report, and in developing a fundraising strategy for WIEGO, is on the generation of core operating support for the organizations. The recommendations in this report refer primarily therefore to core funding opportunities and challenges. Where a recommendation refers only to project funding, this has been noted.

### **Vision and Mission**

A vision statement outlines the ultimate end result and *raison d'être* for an organization's existence. It is an inspiring view of the future world an organization strives towards in its daily work and should implicitly answer the question of why WIEGO's work matters in the world. From our review of the available materials, it does not appear that WIEGO has yet developed a vision statement. This is something that can be relatively easily remedied, potentially as work is completed on the organization's

case statement (see below), or during the development of the organization's communications/outreach/advocacy strategy.

An organization's mission statement is most often the first thing a donor (institutional or otherwise) expects to see in a funding proposal. A mission statement should be relatively brief, clear, and compelling and provide the "what" that supports the "why" of the vision statement. It should outline the specific nature of the organization's work as it seeks to achieve its vision. A good mission statement also inherently demonstrates an organization's uniqueness in relation to its competitors.

The stated mission of WIEGO, as listed on the organization's website and other materials is as follows:

**Women in Informal Employment: Globalizing and Organizing (WIEGO)** is a global research-policy network that seeks to improve the status of the working poor, especially women, in the informal economy. It does so by highlighting the size, composition, characteristics, and contribution of the informal economy through improved statistics and research; by helping to strengthen member-based organizations informal workers; and by promoting policy dialogues and processes that include representatives of informal worker organizations. The common motivation for those who join the network is the relative lack of recognition, understanding, and support for the working poor in the informal economy, especially women, by policy makers, economic planners, and the international development community.

The statement is comprehensive, however it is slightly long and the language is elevated for those not already aware of WIEGO and the nature of its work. (e.g. What is "the informal economy" or a "member-based organization"?) The statement is effective for WIEGO's current donors, who are already educated about the informal economy and the value of research-policy networks and policy dialogue processes.

We would recommend that WIEGO's mission statement either be rewritten, or that it exist in two versions: one that is elaborated as above for more informed audiences and one that captures the work of the organization in a way that is clear for a less informed layperson. (For less informed audiences, it would also be helpful to have a short statement explaining the nature of the informal economy.)

At its Strategic Planning Retreat schedule for the end of May 2007 in Bellagio, WIEGO will review its mission, programme and projects and expects to have a revised mission statement following this meeting.

## **Communications**

Successful fundraising relies on effective communications. We've reviewed the available communications materials (both the WIEGO website and offline materials) in terms of their relevance and usefulness for fundraising.

The WIEGO website is comprehensive and easy to navigate. It is somewhat text-heavy, but this may be appropriate for a research organization with a great deal of specific information to convey. It was not the purpose of this review to thoroughly assess the website and provide specific recommendations aimed at improving that

resource. We note here however that the site would provide ample information for donors seeking further information on WIEGO's work, as well as more detailed information on the informal economy.

For the sake of transparency, it would be helpful for WIEGO to provide a financial summary online in terms of where it's funding comes from and how it is used by the organization.

Branding elements (logo, colour, photos) from the website are carried throughout offline materials as well, providing a consistent image of the organization. For a relatively small and young organization, WIEGO has done a very effective job with the communications resources it has developed thus far.

A more in-depth communications/outreach/advocacy strategy will be developed in the coming year which will provide the organization with the opportunity to develop key messages and materials for its primary audiences. As far as we are able to assess, WIEGO has not formally outlined its key audiences and determined which are priorities in terms of the organizational resources available for communications.

Some materials do require updating (e.g. Fact Sheets) and some of this will be accomplished as part of the implementation of the fundraising strategy. Drafts of two updated fact sheets (one on the informal economy and one on women in the informal economy) are currently being prepared by RD Consulting for confirmation by WIEGO. In the future, updated fact sheets for all of the various elements of WIEGO's ongoing work would be extremely useful for fundraising purposes.

WIEGO's communications materials generally make effective use of photos to demonstrate the human element of the organization's work. In some cases, the stories of individual women are also told. Both the use of photos and the stories of women affected by issues in the informal economy are very important for fundraising purposes as they provide donors with a more emotional connection to the work – at a human level, they tell the story of why WIEGO's work is important. The organization should continue to use photos and the stories of individuals to tell its story. (There are ethical considerations here, but WIEGO has done a good job on this to date. In summary, ethical considerations can be addressed by only using the first names of women when their stories are told; women are identified by their work and region but not by specific village; a photo of a specific woman would not be used next to her own story unless she has given permission. If WIEGO has the ability to have women consent to the use of their stories for fundraising and awareness purposes when it collects the stories, so much the better. If this isn't possible, then the above considerations should protect the privacy of the individuals involved.)

As part of the development of a fundraising strategy, RD Consulting is developing a "case statement" for WIEGO which summarizes in clear, compelling language the work of the organization, its issues and how it organizes to undertake effective work around those issues. The intent of a case statement is to have in one place (ideally, on the

WIEGO ftp site) relevant and consistent information that can be used for the development of fundraising proposals. The case statement would also make the “case” for core funding and the nature of how networks operate and their added value for funders, as well as outline in clear language the financial structure of the organization and its ongoing financial needs. A draft of the case statement is near completion and will be finalized following the Strategic Planning retreat in May.

As mentioned earlier, the language used in WIEGO materials is not likely to be as effective for less informed audiences. In some cases, the language would also benefit from an injection of passion – it should be clear from the language used that WIEGO’s work matters at a societal and individual level. The case statement will go some way towards addressing this issue.

A brief, but important, note here that we are not advising “dumbing down” research findings or policy papers, merely developing more compelling ways of presenting these materials to new audiences. It may be helpful to think of WIEGO’s purpose in developing communications and fundraising materials as intending to capture both “minds and hearts”. Certainly, given the nature of the work, WIEGO must present the organization and its issues in a way that conveys all the appropriate nuances of the issues it explores. At the same time however, WIEGO should seek to gain the loyalty and passionate support of its donors.

## **Organizational Systems**

Effective fundraising relies on the support and input from effective organizational systems, such as planning, evaluation, finances and organizational infrastructure.

Long-term planning for WIEGO is undertaken by the Steering Committee, which meets again for a strategic planning retreat this coming May in Bellagio. Currently, WIEGO has several good short-term planning documents but no formal long-term strategic plan. It would be useful to have a long-term strategic plan for the organization, as larger funders expect their partners to demonstrate a strategic approach to their work. (This was raised several times by one of WIEGO’s current funders during their interview for this review.) A written strategic plan is also useful for providing focus and decision-making criteria when the organization is presented with new opportunities. Given the limited human resources available, a strategic plan would help WIEGO in decisions related to where to best deploy those resources.

At the same time, strategic planning as conventionally undertaken can sap an organization’s energy and take up time more effectively spent on mission work. WIEGO should consider if it is possible to produce a long-term strategy document from its Bellagio retreat that can be easily turned into a plan complete with objectives, timing, and resource allocations for each area of work. It’s our understanding that this is in fact the plan for the Bellagio retreat.

Most large funders look to their grantees to evaluate their work in the course of regular reporting. To that end, WIEGO must be able to demonstrate a strong capacity for evaluation and the willingness to assess its operations with objective eyes. To the best of our knowledge, a comprehensive external evaluation of the work of the organization has not been undertaken in the past few years. (WIEGO has undertaken several internal evaluations, and uses these to adjust its plans and programmes.) It would be useful to identify a time when an external review might happen in order to be able to assure funders that WIEGO is seriously committed to ongoing effectiveness. (Organizations will often undertake a comprehensive review at the end of a strategic planning period – perhaps this would be the time for WIEGO to undertake an organizational evaluation, at the end of the next planning period. It is likely that this would be dependent to some extent on available funding.)

WIEGO's financial structure is somewhat complicated by its affiliations with third-parties (Tides Center, Harvard) through which its funding is routed. However, when it comes to explaining the organization's finances to its members and donors, these arrangements should be largely invisible. (No one is overly interested in the internal configurations, the questions they really want the answers to include where does WIEGO's money come from and what is done with it?) There is a balance to be struck between transparency (which involves both making information accessible and ensuring it can be clearly understood) and comprehensiveness. To this end, WIEGO would be well-advised to take a further look at how the organizations budget and financial reports are presented. It should be possible for both members and donors to understand from these documents how the organization's resources are allocated and tracked according to programme categories and projects, as well as for core costs.

When it comes to core costs, the organization needs to make the case to donors as the importance of funding these. This is true when asking for general support as well as for projects. (A contribution to core costs should always be included in project budgets.) All core costs contribute in some way to making WIEGO programmes and projects possible. An annual budget broken down into programme categories will help make this clear, both internally and to donors. (This document will be included in the final case statement.) Some changes in internal tracking may be necessary to make this possible, for example, time spent on projects and programmes by Secretariat staff may need to be more closely tracked so that real costs can be appropriately allocated. A suggested template for tracking Secretariat staff time will be provided by RD Consulting.

The issue of core costs is further complicated by the relationship of WIEGO to the Tides Center and Harvard University. The perception among both internal stakeholder and current funders which arose during the interviews is that both of these organizations charge high overhead fees for handing grants on behalf of WIEGO. (In reality, this is only sometimes the case as WIEGO has been able to negotiate lower charges on a case-by-case basis at times.) Some interviewees also commented on the perception by donors that WIEGO is not a properly constituted legal entity because it is not registered as its own organization. (It's our understanding that WIEGO has now completed the requirements for registration in the UK.) There is also the perception that simply being

based in the North, regardless of with which institution, has an impact on WIEGO's core costs, making them substantially higher than they would be if the organization was based in a developing economy.

The related issues of where WIEGO is based and whether or not it should become its own entity able to accept grant money and donations directly is still an issue of debate among internal WIEGO stakeholders, and to a lesser extent, concerns current funders as well. (The reality of the current funding environment is that large international donors often prefer to fund competent Southern organizations.) This is an issue that WIEGO needs to discuss further and come to a consensus decision as to a course of action and then set aside as resolved. For the purposes of effective fundraising, several options would be viable, including having WIEGO based in the South, or having several places of registration and approaching donors from whichever seems most appropriate for that particular donor. Registering WIEGO as its own separate entity in the United States is also an option, though likely both more expensive and would not address the Northern vs. Southern perception issue. All of these options would need to be weighed against the current benefits of being associated with Tides and Harvard, as well as examined for possible hidden costs. (An example of a hidden cost could be the cost of employing leading thinkers and practitioners for WIEGO programmes. To some extent, employing the global best and having equity in employment approaches may come with a certain level of cost regardless of location.)

## **Funding Proposals**

WIEGO has been successfully developing fundraising proposals for both core costs and projects for ten years. Its current funders express general satisfaction with those proposals and with their relationship with the organization. Several interviewees expressed their belief that WIEGO staff are highly competent when it comes to proposal development and our review of the proposals we received would certainly support this perception.

One small issue in this area concerns the development of feasible objectives for project proposals. One funder mentioned that they had had some fairly difficult (from their perspective) conversations with one WIEGO individual in relation to developing good objectives for a workshop they funded. As well, a reviewer for DFID<sup>1</sup> (for a WIEGO proposal that was declined) indicated that the project objectives seemed far too ambitious for the project activity and the related amount of funding to be able to reasonably achieve.

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<sup>1</sup> The reviewers comments were provided to RD Consulting as part of the documentation review.

## **Current Funders**

WIEGO's current funders for core costs have a high level of respect for the organization, for its accomplishments and the people involved. WIEGO works in close partnership with these funders and has nurtured strong relationships over the years.

Internal perceptions, from those interviewed, are that core funding from Ford is secure and likely to continue. An interview with the Ford Foundation revealed that while there is a recently renewed agreement in place with Ford, this funding is not a given at current levels in the future. Funding from Ford comes from several programs and there is some concern expressed about such a large amount of funding going to one organization – Ford does not wish to create or perpetuate dependence on it as a sole or too significant source of funding. There are also perceptions at Ford that WIEGO has large overhead costs associated with being based at Harvard. While existing relationships are strong, no organization is ever secure from staff changes within its major donor so WIEGO should make an effort to educate people within Ford beyond its current funding envelope. (For example, the Women's Rights program officer at Ford has expressed an interest in learning more about WIEGO and does fund global women's rights groups as part of her mandate.)

Based on the interview with them we conducted, IDRC funding for WIEGO is considered relatively secure with good prospects for future funding, providing the current funding environment and program priorities within IDRC do not change. WIEGO should make a point of monitoring internal dialogue at IDRC and explore other funding opportunities and relationships within the organization. The amount of funding IDRC is contributing to WIEGO for core costs is not large compared to other research organizations IDRC has funded over the years so there may be opportunities for increased funding for core costs as well, if the case can be made.

## **Lapsed Funders (Unsuccessful Approaches)**

WIEGO used to receive funding from the Rockefeller foundation but staff and program changes at the foundation has made it difficult to know whom to best approach. WIEGO intends to approach Rockefeller again in the near future, however. There are no other real lapsed funders for WIEGO.

The DFID project proposal mentioned above is one unsuccessful approach. At the same time, WIEGO has received smaller amounts of project funding from DFID and several internal stakeholders remain convinced that there is more significant potential for WIEGO with DFID, especially given the new registration in the UK. However, one interviewee also noted that DFID may need to be educated as to the nature and value of the informal economy before they will be prepared to give more substantial amounts of funding. In fact, over the years, WIEGO has made several approaches to DFID. The organization should undertake a new in-depth assessment of the potential for funding at DFID and make another approach if the assessment indicates this would be warranted.

(IDRC has volunteered to make some introductions with their contacts at DFID if this would be helpful.)

One current donor mentioned a project proposal submitted for one of its programmes that “was very messy aggregated proposal...that didn’t hang together very well and required a lot of work” from the donor. This proposal was eventually funded but raised concerns for the donor about how WIEGO approaches proposal development. The comment was made that the organization relies too heavily on individual initiatives around projects and needs to be more strategic. (However, the donor also felt progress was being made in this area.)

There is no documentation on other unsuccessful approaches. Interviewees noted that these have tended to be simple cases of WIEGO’s interests and a donor’s interests not being aligned or an unavailability of funds. We feel WIEGO would benefit from a more formal system to track all donor approaches and their responses (see below).

## **Capacity**

WIEGO has a ten year history of successfully soliciting funding for core costs from some of the world’s most sophisticated donors, and significant project funding in smaller amounts over the years from a wider variety of funding. The group already has the capacity to develop project proposals and develop/nurture relationships with funders. This is not a case where the organization needs to spend significant time or money “fixing” or preparing itself before it could be ready to solicit funds; with a few exceptions, the organization is more than ready to go find those additional funds. Its most significant issue is capacity.

Capacity in resource mobilization is a complex mix of available skill sets, energy, enthusiasm, marketing knowledge, sound organizational structure and available time. WIEGO’s most significant capacity restraint is the available time for fundraising on the part of those most skilled at it. Currently, most WIEGO fundraising is led by Coordinator Marty Chen. This is both because it is a major part of her role as Coordinator, but also because she is exceptionally skilled at it. Marty puts an immense amount of time into fundraising for the network and is successful, but at a cost in terms of her available time to devote to programming and organizational development. She is also unable to do more, or to devote the kind of time required for WIEGO to more proactively build a diverse fundraising program.

In theory, Program Directors also have some responsibility for fundraising, particularly for individual projects. However most feel they do not have enough time for this, and in several cases directors express open dislike for fundraising and wish they did not have to do any. WIEGO currently contracts with its Program Directors for three months of work each year. If Program Directors spend significant amounts of time fundraising, one might reasonably ask who is providing program direction. Both the Coordinator and Program Directors are senior academics and practitioners in the field of the informal



economy – their most significant contribution to the work of the organization should not necessarily be fundraising.

That said, Program Directors will always need to have some involvement in fundraising, as to a lesser extent, should everyone involved with the organization. There may be some misunderstanding however as to what that might most effectively involve and WIEGO should have a discussion to clarify the roles and responsibilities of everyone involved in fundraising. Program Directors can reasonably be expected to develop high-quality proposals for projects under their jurisdiction, and to attend donor meetings as necessary to represent WIEGO and their area of specialty. They are also the only people capable of providing the necessary details for donor reports on these projects, and reasonably be expected to keep their eyes and ears open for possible funding opportunities. Beyond this, it is difficult to ask someone who works three months of the year to actively seek out multiple new sources of funding, and difficult to imagine how they might contribute to the solicitation of core funding beyond the effective management of excellent programming.

Secretariat staff have also been involved in proposal development and other aspects of fundraising. Again, a key concern here is the issue of available time and what other aspects of their daily jobs might need to be put aside if more responsibility for fundraising was vested with Secretariat staff.

In the key capacity area of time, another solution needs to be found to relieve Marty of a portion of the work related to resource mobilization for core funding and to support Program Directors in their search for project funding. (We would recommend those tasks be first and second in priority, respectively.) We expect to recommend that WIEGO find the resources to hire a fundraising staff person in some capacity, and would develop the core competency profile and job description for this person as part of the fundraising strategy.

## **Training**

Straight fundraising training per se is not likely to make a major difference for WIEGO at this time. Generally speaking, the organization has the necessary knowledge base for preparing proposals and developing relationships with donors, and a history of solid reporting.

However, there is a case to be made for more specific internal training on the financial structure of WIEGO and the costs of operation, as well as how to make the case for these with donors, what the organization can and cannot afford to fund itself, and what to include in proposals in terms of core costs. General training on “Making the case” – translating ideas into something that can be sold to donors – has also been suggested as something that might be useful. It’s possible however that this information could be provided outside of a formal training environment, in the form of documents placed on an FTP site where they are available to all who need them and make the case or relevant arguments in advance of when they are needed for specific proposals.

## Organizational Tensions

Developing a fundraising strategy and soliciting higher levels of funds almost always highlights existing tensions within an organization that will need to be either monitored or resolved for the strategy to ultimately be successful. WIEGO is no exception to this, although internal interviewees were quite optimistic that given the excellent relationships within the network these tensions can be resolved relatively easily.

As one interviewee noted: *“WIEGO is made up of members all going to the same funding sources so there is potential for tensions there.”* In fact, the majority of those interviewed raised this as a potential source of tension as WIEGO prepares to raise more money; that is, the needs of member organizations such as HomeNet, SEWA and StreetNet to raise funds might place them in a position of conflict of interest or direct competition with WIEGO. At the same time, it was felt that this had been well managed in the past and the organizations did such different work that they did not compete with one another even with existing common funders such as Ford. (WIEGO also raised funds for these members of the network early in their organizational life.)

From an outside perspective, it is certainly possible to address this issue easily. An agreement can be prepared to be signed by all parties whereby all information on prospective donors developed through the fundraising strategy is intended for WIEGO's use only at this point and related organizations are not free to use this information for their own direct fundraising purposes. At the same time, WIEGO can agree that as it becomes aware in its own fundraising research of opportunities that would be more relevant for its member organizations, it will share that information with them for their use. If members can agree to such an arrangement (or something similar) then the strategy development should proceed smoothly. Otherwise, it's probable that the implementation of the strategy may need to be placed on hold while these tensions are adequately addressed to everyone's satisfaction.

Coordination of approaches was an issue raised by interviewees, in order to ensure that people are not contacting the same donors. We would suggest this issue is also one of corporate memory and recommend that WIEGO put in place a system to capture information on who is approaching whom for funds when for which project(s) and to ensure the donors' responses are on file for future use. RD Consulting will provide a suggested template and process for this.

It was mentioned in the interview process that once WIEGO raises more money, this may raise additional tensions within the network in terms of how funds are distributed. Some of this concern could be alleviated with a written strategic plan which lays out clear priorities and directions for WIEGO – one assumes that funding would follow agreed-upon priorities.

## **Competition**

The issue of internal competition is raised above and will need to be addressed prior to the implementation of a fundraising strategy.

One interviewee noted that “everyone” could be considered competition for WIEGO, that is all other organizations applying to the same funder, and this is certainly true.

It is interesting to note however, that in the case of both current funders for WIEGO, they felt that WIEGO was somewhat unique in both its structure and its mandate and that this protected it to a certain extent because there was no direct competition from other similar organizations. Both funders cited this uniqueness as one important reason for continuing to support WIEGO.

## **Constraints**

There is a perception (from those interviewed) that the general funding climate does not necessarily favour WIEGO or its current methods of fundraising, in that governments are decentralizing their funding envelopes and prefer to work with competent Southern organizations based on approaches in the field. (We would note there is nothing to prevent WIEGO from doing this.)

The related issues of WIEGO being based in the North and at Harvard have already been raised above, but most internal interviewees raised this as an issue and several see it as a major constraint. Subsequent to the internal interviews, RD Consulting had a brief conversation with a major funder considering a significant institutional strengthening project for research networks. When asked if they would be considering Northern-based organizations, the response was “absolutely not”. While this is just the response of one funder, it does suggest that the issue warrants further discussion by WIEGO and a full assessment of the pros and cons of how where the organization is based affects its ability to be self-sustaining. This is a complicated issue, without clear immediate answers and WIEGO should take the time necessary to make this important decision based on all the available facts.

Current funders and internal interviewees felt that donors do not like to fund core costs, but at the same time several suggested (and current funders were adamant about this) that WIEGO ought to include some core cost recovery in project proposals, make a strong case for it and continue to pressure donors to fund these costs.

The point was also made by internal stakeholders that many donors need to be educated as to the nature and value of the informal economy and this can take time.

However, by far the most significant constraint to increased WIEGO fundraising is the issue of capacity (see above).

## **Unlikely Prospects**

There are multiple ways to raise funds, but not all of these methods are equally effective for all organizations. As well, some methods are better for raising project funds (e.g. proposals to bilaterals) and some are more suited to core cost fundraising. Some also require fairly substantial resources to invest and time to develop (e.g. individuals).

In the case of WIEGO, we would recommend that the organization not pursue corporate fundraising at the moment. This is based on our own assessment, as well as the opinions of internal interviewees, who were generally not in favour of fundraising directly from corporations directly. (The more arms-length corporate foundations were seen as separate and more feasible.)

Perhaps a case can be made for this in the future, but our assessment is that WIEGO doesn't currently have the high-level marketing savvy or communications resources required to develop successful partnerships with corporate funders directly. (Corporate foundations are another matter and there may be some potential here but we would consider these under "Foundations" below.) In any case, the number of corporations that might potentially be open to donating to WIEGO are relatively few in our assessment and these partnerships would take time and staff resources to develop. They would also be likely to yield less than foundations or government aid agencies. In addition to these practical reasons, there are indications that not all internal stakeholders would be comfortable with this type of fundraising, indicating that it is best left for the future, if at all.

Some interviewees also expressed concern over accepting core funds directly from governments (instead of via aid and development agencies) and from some multi-lateral public sector institutions. Specifically, the IMF and World Bank were considered problematic and more likely to be targets of influence rather than potential donors. We believe there is enough potential elsewhere, and limited evidence that these donors would actually support WIEGO to any significant extent, such that WIEGO can afford not to consider these as potential donors for the moment.

## **Potential Opportunities**

Where they possessed the knowledge, interviewees were generous in suggesting specific names of potential supporters. There was also considerable consensus among both internal stakeholders and current WIEGO funders that the greatest potential for WIEGO fundraising was likely to exist in foundations not currently funding the organization, as well as aid and development agencies.

In the short term, we would recommend that WIEGO make every effort to identify all possible sources of core funding from the foundation community in the US, UK and Europe. In addition, we would recommend that WIEGO also search out opportunities with aid and development agencies in Nordic countries, the EU, Canada and the UK. A

fundraising strategy aimed at these potential donors for the next two to three years should be WIEGO's first priority. Great attention to prospect research, the development of an excellent case statement and proposal templates will be the cornerstones of such a strategy, as well as addressing the capacity issues and some potential organizational tensions. It's our assessment however that this would be the best course of action for WIEGO at this time. (A preliminary prospect study has yielded more than 75 potential foundation donors. The study will be expanded and completed between now and the implementation of the strategy later this Spring.)

For the long term, we have three other possibilities to suggest. We would consider long-term to be three to five+ years out and the implementation of these tactics contingent on the organization being able to generate the required resources.

a) It's possible that WIEGO can convince several large donors to create an endowment fund for the organization, the interest from which could fund core costs. It may be worth testing the feasibility of this down the road with potential funders. Other development research organizations have made this work, notably the African Economic Research Consortium (AERC) which shares donors in common with WIEGO.

b) One interviewee raised the issue of whether WIEGO could initiate a "Donor Committee on the Informal Economy". Similar committees already exist: e.g. The Enterprise Development Committee which has representation from large bilaterals and donors, and the International Human Rights Funders Group. Such a committee would share knowledge and provide a forum for funding things together that are difficult to fund individually, developing funding criteria, etc. This sounds to us like a potentially viable idea that warrants further investigation but would be long-term. The significant added benefit to such an approach would be the opportunity to influence large international donors on the informal economy.

c) There are relatively few research development organizations that could effectively raise core funds from individual donors. Given the nature of its cause (working with and on behalf of the world's poorest people; with a focus on women) WIEGO would be well placed to fundraise among educated women in either the US or UK. A donorbase of several thousand individual donors would provide WIEGO with unrestricted income with which it could fund its core costs or projects that had proved difficult to fund elsewhere. (This is possible because of the nature of private donor fundraising, which presents the full picture of an organization's work rather than specific projects.) In time, a portfolio of major individual donors could also be developed that would fund both core operations and projects. However, while we believe WIEGO could be uniquely successful in this area of fundraising, it also requires professional staff and significant resources to invest. We would recommend that WIEGO investigate individual fundraising and explore whether there are donors who would invest in this portion of the fundraising strategy.

## Summary of Recommendations

1. WIEGO should develop a short, compelling vision statement for the organization which provides donors with an inspiring view of the future world WIEGO strives towards and implicitly answers the question of why WIEGO's work matters in the world.
2. WIEGO's mission statement should either be rewritten, or be available in two versions: one that is elaborated as currently exists for more informed audiences and one that captures the work of the organization in a way that is clear for a less informed layperson. (For less informed audiences, it would also be helpful to have a short statement explaining the nature of the informal economy.)
3. For the sake of transparency, it would be helpful for WIEGO to provide a financial summary online in terms of where it's funding comes from and how it is used by the organization.
4. When the communications/outreach/advocacy strategy is developed, consideration should be given to how it will help to advance the fundraising strategy, and vice versa.
5. WIEGO's current Fact Sheets should be updated.
6. The organization should continue to use the photos and stories of individual women to tell its story with a human element.
7. When finalized, WIEGO's case statement should provide in one place (ideally, on the WIEGO ftp site) relevant and consistent information that can be used for the development of fundraising proposals. The case statement should also make the "case" for core funding and the nature of how networks operate and their added value for funders, as well as outline in clear language the financial structure of the organization and its ongoing financial needs.
8. From its Bellagio strategic planning retreat in May 2007, WIEGO should develop a written long-term strategic plan that outlines the main priorities of the organization and provides for a comprehensive external evaluation of the organization and its work at the end of the planning period.
9. WIEGO should take a further look at how the organization's budget and financial reports are presented, from the perspective of how members and donors can clearly understand from these documents how the organization's resources are allocated and tracked according to programme categories and projects, as well as for core costs. An annual budget broken down into programme categories (with core costs allocated to the relevant programmes) would be helpful in this regard and necessary for the case statement.

10. WIEGO needs to discuss and come to a consensus decision about where its Secretariat will be based and whether it will exist as its own legal entity in the US or elsewhere. Once decided, this issue should be tabled as resolved for the foreseeable future.
11. Within its current donors (Ford and IDRC), WIEGO should ensure that key people beyond its current direct contacts are aware of the work of the organization. Both current donors may hold additional future potential for the organization. (We note here that WIEGO has been doing this where opportunities present themselves and this may be a case of attempting to be more proactive in this area.)
12. WIEGO should consider a strategy for educating key donors and prospective donors as to the nature and value of the informal economy.
13. Some clarity may be needed as to the actual role of Program Directors and Secretariat Staff in fundraising.
14. WIEGO should consider hiring a fundraising staff person to relieve Marty Chen of some of the work related to resource mobilization and, secondarily, to provide Program Directors with support for soliciting project funding. (A job description and core competency profile for such a position will be developed.)
15. Straight fundraising training does not seem to be required at this time. However, resources on WIEGO's financial structure and how to make the case to donors for covering core costs (both generally and within project proposals) would be useful.
16. An agreement should be developed addressing internal issues of potential competition.
17. Approaches to all donors should be tracked formally by the Secretariat for corporate memory purposes, as well as all donor responses.
18. WIEGO should consider how it can take advantage of current donor trends by applying to governments and large foundations from the field. Part of this question is when WIEGO can legitimately present a "Southern" face to the organization. (We note here that WIEGO has done some of this in the past and this will be a case of slight improvements rather than a significant change.)
19. All project proposals should include a portion for core cost recovery. All WIEGO staff should have access to the materials to make a compelling case for these costs.
20. WIEGO should not pursue corporate fundraising at this time, for either core support or specific projects.

21. WIEGO should not pursue direct government contributions (outside of aid and development agencies), or either core or project funds from the IMF and World Bank at this time.
22. In the short term, WIEGO's fundraising strategy should be based upon private foundations and aid/development agencies in the US, UK and Europe. This should be a two to three-year strategy with a built-in evaluation component.
23. In the long-term, providing resources can be found to invest, WIEGO should investigate the possibilities of establishing an endowment to fund core costs, developing a Donor Committee on the Informal Economy and/or the possibility of raising funds from individuals in the US or UK.