

DESCRIPTION – FUNDRAISING RESEARCH

BRETTON WOODS PROJECT and COUNTER BALANCE - 2020

Proposals should be submitted to lvieira@brettonwoodsproject.org and xavier.sol@counter-balance.org no later than **Friday, 3 April 2020**

Objective, scope and requirements

The Bretton Woods Project (BWP) and Counter Balance (CB) are seeking an experienced fundraiser and consultant familiar with the economic justice and development finance communities to identify additional sources of finance for both organisations.

The proposed research will assist both organisations in their fund-raising activities with the goal of strengthening the long-term sustainability of both networks by enabling them to identify additional sources of financing beyond current funders and to develop a fund-raising strategy based on the findings thereof. It is in this context that BWP and CB propose to contract a researcher to identify additional potential funding avenues with a particular emphasis on non-traditional funding opportunities, such as philanthropic sources. The researcher will also be expected to update BWP and CB on changing trends and strategies among more traditional sources of finance.

More specifically, the consultant will develop a research methodology and work plan in consultation with BWP and CB that will enable the identification of additional sources of funding for BWP and CB. In light of the small size of both organisations and related administrative constraints, the consultant is expected to integrate reporting and other funding requirements as an important consideration of proposed funding sources. While the consultant is encouraged to research as many funding options as possible, with the exception of corporate sources, he/she is expected to at least consider the following:

- Private funders (foundations)
- Public funders (national governments as well as EU programmes)
- Philanthropists

Particularly in light of increasingly difficult financing conditions among ‘established’ donors, it is imperative for the long-term sustainability of both organisations that they are able to expand and diversify their funding base with a particular focus on non-traditional funders, for example among the philanthropic community. It is also important that the research also assists both organisations to explore evolving fund-raising techniques, such as crowd-funding or other social network or internet-based outreach mechanisms.

Guided by input from BWP and CB, the consultant will be responsible for developing a fund-raising methodology and workplan and for researching and identifying donors. The results of the research will be summarised in a scoping paper.

Supervision

The supervision of the consultancy will be jointly managed by the Director of Counter Balance (Xavier Sol) and the Coordinator of the Bretton Woods Project (Luiz Vieira), who will communicate regularly to oversee the work of the researcher, provide feedback and review the outcomes of the consultancy.

In addition to exchanges with BWP and CB during the research period, the consultancy will include in-depth discussions with BWP and CB prior to the research period to ensure that the research takes into consideration key information about both organisations, including:

- a) Institutional mission, vision and programmatic focus(es)
- b) Multi-year strategy
- c) Staffing structure
- d) Operational budget
- e) Current funding and fund-raising plans
- f) Past funders

Timeline

The consultancy is to take place from 13 April 2020 to 15 June 2020

Costs

A consultancy contract will be established with ActionAid UK.

Resources available are of a maximum of 10.000 Pounds, VAT included.

The consultant will provide a detailed budget for consideration.

Deliverables

The deliverable consists of a detailed funding scoping study for internal use by BWP and CB.

The outcomes of the scoping exercise will be integrated in a report of a maximum 15 pages detailing:

- a) A list of potential funders subdivided by priority (i.e., most well-aligned and likely to respond favourably), category (e.g. philanthropic, foundation, public), geographic origin and thematic focus (e.g. environment, economic justice, democratic governance, development finance).
- b) Information on the rationale and suggested/tailored 'line of approach' for each proposed funding source.
- c) Summary of granting cycles, grant limits, board meeting dates, application requisites, formats, principal points of contact and relevant current/ recent granting relationships with similar organisations/ networks.
- d) Addresses, links to website, etc.

Selection criteria

Criteria to be taken into account to select an application are:

- Proposed methodology and research plan for the funders scoping (to be adjusted in coordination with BWP and CB)

- Experience of the fundraiser
- Knowledge of NGO networks and campaigns
- Familiarity with potential funders relevant for BWP and CB
- Familiarity with the philanthropic community is considered particularly valuable.
- Costs

About Counter Balance and the Bretton Woods Project

BWP and CB decided that the complementarity of their work, the interest of common funders and shared financing challenges make a joint request for fundraising support an effective use their limited resources. The rationale for the joint proposal is strengthened by BWP's formal membership in the Counter Balance coalition, and over a last decade of regular cooperation.

Counter Balance:

Counter Balance is a coalition of European coalition of development and environmental non-governmental organisations (NGOs) with extensive knowledge of and experience working on development finance and the international financial institutions (IFIs) as well as campaigning to prevent negative impacts resulting from the financing provided by multilateral development banks (MDBs). Counter Balance's mission is to make European public finance, whatever its channel, a key driver of the transition towards socially and environmentally sustainable and equitable societies.

The coalition was formed in 2007 to challenge and push for reform at the European Investment Bank (EIB). While the EIB remains CB's main target, the coalition has expanded the scope of its work to other public investment banks such as the European Bank for Reconstruction and Development (EBRD) and national Development Financial Institutions (DFIs) – all public financial institutions which operate similarly. CB also deals with related EU policies and regulations impacting those institutions.

Counter Balance achieves its mission by holding EU public financial institutions to account, challenging harmful decisions, policies and projects, and promoting alternatives. As a coalition, it works in close cooperation, solidarity with, and support of affected communities and citizens around the world. Research and [publications](#) of materials that challenge the dominant market-based logic of IFIs is a key focus of the coalition.

Counter Balance challenges the business model of public investment banks which is increasingly subordinated to market logic and tends to subvert their development mandate. The tendency to appeal to and strengthen financial markets rather than to counterbalance them is also reflected in the financial mechanisms used to finance infrastructure and support the private sector.

At the same we promote and advocate for more transparency and stronger accountability mechanisms for these institutions. We support our findings and recommendations through case studies illustrating the impact of public financial flows.

Currently Counter Balance's priority areas are Environment and Climate Justice and Transparency and Accountability.

The Bretton Woods Project:

The Bretton Woods Project envisions a global economic system that operates on the primary principles of justice, equity, gender equality, human rights and environmental sustainability, with international institutions that are democratic, inclusive, transparent, accountable, and responsive to citizens, especially the poorest and most vulnerable.

BWP focuses on the World Bank and the International Monetary Fund (IMF) to challenge their power and open space for civil society and social movements to contribute to the development of policies that are gender transformative, equitable, environmentally sustainable and consistent with international human rights norms. The Project does this because the Bank and Fund remain global opinion formers, funders and influential proponents and enforcers of economic and development policies.

Established in 1995 by the UK-based Bond [Development and Environment Group](#) (DEG) to support civil society to monitor the negative developmental impacts of World Bank and IMF policies and activities, BWP has, throughout its history, developed extensive knowledge about the Bank and Fund as institutions and an in-depth understanding of their role within the broader international development landscape.

As rooted in its mission, the Bretton Woods Project acts as a watchdog by monitoring the World Bank and IMF, with a particular focus on the impact of Bank and Fund policies and activities on the environment, human rights and democratic governance. The Project builds and maintains an information and evidence base and is a credible critical voice on the Bank and Fund and on their role in the broader international finance landscape.

BWP amplifies the voices of marginalised communities, social movements and civil society partners from the Global South by providing avenues for expression, access to decision-makers and opportunities to explore prospects for cooperation with groups globally. As part of our work monitoring the Bank and Fund, BWP acts as a repository and a platform of critical news, evidence and analysis that it disseminates to civil society and official audiences.

BWP coordinates and consults with UK-based civil society organisations, including a BWI-UK email list, functioning as a 'network hub' and a 'port of call' for both UK officials and CSO partners working on Bank and Fund and related IFI issues, and acting as an interlocutor between IFIs and civil society partners.

In order to keep civil society and the public informed about the Bank and Fund, BWP produces a range of communications outputs. The [Bretton Woods Observer](#) is a quarterly critical review of developments at the World Bank and IMF, the [News Lens](#) is a twice-monthly electronic roundup of news and critical viewpoints from the global media and civil society about the Bank and IMF. Alerts highlight both BWP's geopolitical analyses around the World Bank and IMF Spring and Annual meetings in the [Dispatch](#) and other information about new publications and events. Find out more about our [subscriptions here](#).

Finally, BWP undertakes activities that have specific direct, time-bound and targeted objectives in terms of bringing about particular policy changes at the Bank or Fund. The current advocacy projects focus on Environment, Private Finance and [Gender Equality and Macroeconomics](#).

The Bretton Woods Project adjusts to changes in the global geopolitical context and the changing roles of the Bank and Fund by actively adapting the approaches it uses to achieve the changes it seeks. In order to ensure that its vision, mission and objectives appropriately respond to changes in its operational environment, the Project conducts a periodic strategic review that informs revisions to its strategic plan, which currently runs to 2022.