



# TOGETHER FOR A FEMINIST EUROPE

**Financial Resilience &  
Sustainability Plan**  
European Women's Lobby

2016 - 2020

## ▶▶ What is a Financial Resilience & Sustainability Plan and why do we need one?

A financial resilience and sustainability plan (FRSP) is designed to support the organisation to raise the funds it needs to carry out priority activities to achieve its overall strategic aims. This FRSP outlines the actions, timescales and resources that will be implemented to enable the European Women's Lobby funding needs to be met. It is designed to help prioritise our projects and targets, our energy and resources effectively. It is also a useful tool for articulating our goals and activities to other stakeholders to win their support and cooperation.

The FRSP is a working document that staff, in particular Secretary General and Programme Director, the Executive Committee and the Management and Coordination Team (MCT) use to review and record past successes and to prioritise future actions. This financial resilience and sustainability plan covers a five-year period and details the plans for the end of that time period. This plan will be annually adjusted and will undergo a renewal after five years.

## ▶▶ Methodology

This plan has been developed through a participatory process involving all parts of the European Women's Lobby (EWL). The results evolved through various consultation meetings with staff, members, executive committee and board members, including during the board meeting in Brussels in October 2015. The meetings were designed in a participatory and democratic way to ensure full ownership by the members and staff and to fuel the future Strategy of EWL. This Financial Resilience and Sustainability Plan is aligned with EWL's five-year Strategy for a Feminist Europe (2016 – 2020), which sets out a transformational vision and agenda for EWL's collective action for a feminist Europe. While the FRSP supports delivery of all aspects of EWL's strategic plan, it is particularly focused on the internal strategic aims "Building our Movement", specifically "raising more, better and sustainable funding for women."

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# ▶▶ 1 BACKGROUND SECTION

## ▶▶ EWL'S VISION

### **We believe in a Feminist Europe.**

We want a holistic, transformational socio-economic vision, based on well-being, equality, social justice, and a powerful voice against women's poverty. We envision a culture in which women enjoy equal rights and participation in reimagined power and decision-making structures, in which all forms of violence against women has been eliminated, and women have been liberated from all forms of oppression. We envision a society in which women's contribution to all aspects of life is recognised, rewarded and celebrated - in leadership, in care and in production; all women have freedom of choice, self-confidence, and freedom from exploitation; and no woman has been left behind.

## ▶▶ EWL'S MISSION

We are a credible source of expertise and experience on women's rights and equality between women and men, representing the diversity of the women's movement across the European Union. We represent an inclusive, confident, loud, independent feminist voice and bring real women's voices into the EU political arena. We build consensus and mobilise our members' collective experience to work on major issues affecting women, to realise women's rights, equality between women and men and social justice. We act as a catalyst connecting different actors and organisations to bring change at EU level.

▶▶ EWL's five years Strategy (2016 – 2020) was adopted by the members at the board meeting in May 2015. The Strategy Plan was created in a participatory manner via consultation and joint meetings of all members.

## ▶▶ STRATEGIC AIMS: LONG TERM GOALS TO ACHIEVE OUR VISION

### **Building our Movement: 4 INTERNAL Strategic Aims**

1. To raise more, better and **sustainable funding** for women
2. To work together effectively at **different levels and in different contexts**: local, national, European Union and International.
3. To promote and debate **diversity**, advancing consensus, and strengthen our collective voice.

### **Transforming society: 4 EXTERNAL Strategic Aims**

1. To ensure sustainable and strong institutional mechanisms for equality between women and men at **EU level**.
2. To put an **end to all forms of violence against women and girls** and promote a society of peace, human security and dignity.
3. To challenge and change the culture of **sexism and stereotypes** and promote positive roles for women and men.
4. To promote the feminist transformation of a **sustainable economy** based on new economic models based on equality, well-being, care and social justice.
5. To position women at the heart of **political, social and economic participation and decision-making**.

## Integrating this Financial Resilience & Sustainability Plan within EWL's Strategic Vision

While the FRSP supports delivery of all aspects of EWL's strategic plan, it is particularly focused on the internal strategic aims **"Building our Movement"**, specifically **"raising more, better and sustainable funding for women."**

### Background

The lack of funding for women's rights and equality between women and men constitutes a significant threat to the achievement of equality between women and men. The level and regularity of resourcing has been one of the main factors contributing to the success or failure of institutions for the promotion of women and gender equality strategies.

In Europe, and throughout the world, the financial crisis and austerity have had a major impact on the resources available for work to advance women's rights and equality between women and men<sup>1</sup>. At a time when women's rights, and gender equality are far from being achieved, special attention must be given to increasing levels of resourcing for measures which aim to advance equality between women and men.

Financial resources, in particular, core costs<sup>2</sup>, are also at the heart of ensuring a voice for women's rights organisations at all levels. This is of direct concern to EWL and its member organisations especially as it impacts on their own sustainability.

The analysis of our EWL strategic plan clearly highlights the need to develop new ways of working that strengthen the leadership and financial resilience of EWL members and their members. This includes but is not limited to building capacity amongst EWL members for strategic planning, programme design, organisational development, movement building and financial planning and management.

### What Does Resilience Mean in terms of Financial Sustainability for the EWL and its Members?

The Oxford dictionary defines resilience as "the capacity to recover quickly from difficulties; toughness" and the ability of a substance or object to spring back into shape; elasticity.

For the EWL, resilience means bringing our longstanding experience in being strong and flexible in campaigning for a feminist world to our fundraising and financial sustainability aims. Resilience is about adaptability, about being proactive, about the ability to adjust in response to changes in the external and internal context.

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<sup>1</sup> More info at AWID New Actors, New Money, New Conversations: Julia Miler, Angelika Arutyunova, and Ciny Clark, 2013 and here: <http://www.awid.org/publications/new-actors-new-money-new-conversations>

<sup>2</sup> Core costs are the expenditure budgets that are not connected with the levels of activity undertaken by an organisation. They will exist before and after a project (programme, campaigns etc.) is undertaken. These include governance and administration costs essential for the effective running of an organisation.

It is the opposite of being reactive, far too often non-profit organisations find themselves in the so-called "starvation cycle" which leaves nonprofits so hungry for decent infrastructure that they can barely function as organisations and serve their organisational priorities and stakeholders. The cycle starts with funders' unrealistic expectations about how much it costs to effectively manage and run a nonprofit, and results in nonprofits' skimping on vital systems such as spending on capacity-building of staff, resource mobilisation, technology systems, organisational and management capacities and other essential overhead.

Nevertheless, throughout the history of feminism, women have demonstrated that they are especially well-equipped to bounce back in the face of set-backs and opposition, to take risks, and to remain focused on their goals which explains why the feminist movement is one of the most successful social justice movements of the past 100 years.

Therefore, EWL is setting out through its new strategy, and through this FRSP to break this starvation cycle in every respect, by fostering a culture of curiosity about new ideas, trends and innovation in terms of fundraising and financial sustainability.

### Resourcing women's rights and the feminist movement as an integral part of all EWL external programme and campaigns work

The FRSP can only be successful when the EWL and its members succeed in bringing greater focus on the politics and practices around resources for women's rights organisations and movements. The EWL and in particular the EWL Programme team aims to connect EWL staff, members, feminist and women's rights groups, organisations and movements to relevant information resources and accountability tools to advocate and campaign for more and better funding. We will aim to generate stronger commitment among diverse funders and in relevant European policy frameworks to commit resources for women's rights and the feminist movement. The EWL therefore will advance these aims through research and offering strategic knowledge and convening spaces for staff, members, activists, advocates and funders to analyse, reflect and jointly strategise on funding trends and resource mobilisation strategies as well as through targeted advocacy and campaigns.

## ▶▶ 2 EWL FINANCIAL STRATEGIC OBJECTIVES 2020

Through a process of scenario budgeting with staff and governing bodies during the development of the financial and sustainability plan, EWL has developed the following financial growth projections based on a scenario of positive financial growth and diversification for 2020.<sup>3</sup>

### Strengths and risks associated with EWL's current financial position

The **base scenario** would be based on the current state of play in which EWL has an annual budget of around €1.2 million and is heavily dependent on its major donor, the European Commission, which accounts for 80% of our annual total budget.

Furthermore, the EWL secretariat would spend its time and human resources in small scale budgeted project proposals to match its co-funding, which is around 20% to the Commission's grant.

This scenario is putting the EWL in a highly risky position as we depend too much on one income source, spend disproportionate time raising and managing small grants from many donors, and have little to no room to build our financial reserves and to grow as an organisation. The strengths of this current situation is the strong and continued financial contribution by the European Commission, which covers much of the core funding needs of the organisation, and enables long terms strategic and operational planning.

Therefore, EWL governing bodies strategically decided to propose and work towards an alternative best case scenario to better achieve our mission and long term resilience.

### Agreed growth scenario

This scenario for 2020 envisions the growth of our total annual revenue to €2 million by 2020. This represents an increase in annual revenue of 70%, which would enable EWL to achieve the following results:

- Allow us to invest in expanding our campaigns, capacity and movement building in line with our strategic plan;
- Allow us to build our financial reserve;
- Allow us to invest in essential human and technological infrastructure;
- Enable us to start exploring opportunities to create a European level fund that supports women's organisations across Europe of €5 million.

<sup>3</sup> Scenario budgeting/planning is to help organisations to build a number of plausible future outcomes by simulating alternative views of the future against which strategies, tactics and budgets can be tested.

### What Does this Look Like in Practice?

Quadrupling the non-EC funding income over the five years:

Year	EWL Annual Budget
2016	1.200.000,00 Euro
2017	1.400.000,00 Euro
2018	1.600.000,00 Euro
2019	1.800.000,00 Euro
2020	2.000.000,00 Euro

### Strategic Goal

To foster a strong culture of fundraising throughout the whole organisation assuring that everyone (staff, governing bodies, in particular the executive committee and members) value and help solicit the financial and support needed to fund EWL's mission.

### Strategic Objectives

1. Strengthen the governing bodies' role in development and support for philanthropic culture through ongoing exchange, online and offline trainings.
2. Strengthen the fundraising and programme skills and knowledge of key staff and members through ongoing coaching, trainings and collaborative meetings.
3. Position the EWL as the best placed and expert regarding women's rights within the philanthropic community.

## Guiding Principles

EWL's guiding principles are the core drivers of its FRSP over the coming five years. These guiding principles were developed together with staff and governing bodies to ensure a coherent approach towards a sustainable and resilient EWL and feminist movement across Europe.

**Mission first:** Our mission drives our resource mobilisation and fundraising efforts to increase our independence and sustainability in the long run.

**Decreasing dependency:** We seek to decrease our dependency on the European Commission which represents currently our largest grant, namely 80% of our total annual budget to a maximum of 50% by 2020.

**Diversification:** EWL will further diversify, cultivate and grow its number of sources across funding sectors, including growing number of larger and multi-year grants.

**Building our reserves:** EWL starts building its financial reserve by developing and implementing fundraising plans that prioritise the building of our financial reserves.

**Growing the overall funding for EWL, its members and the wider women's movement:** Accessing new funding we will aim to grow the amount of resources available overall.

**Collaboration:** We will always adhere to the principle of non-competition. The EWL and its members will go beyond the mind-set of "scarcity of resources", and will start and work differently with a refreshed mindset which includes sharing our intelligence and fostering collaborative fundraising and resource mobilisation.

**Learning and innovation:** EWL together with its members will embrace therefore a culture of learning, innovation, trying new things and not being afraid to fail. The EWL will use failures as opportunities to improve and to grow. The aim will always be to build our collective resilience and ability to work together towards our mission. Therefore, the EWL will continuously build the capacity of staff and members on financial resilience and programme design.

**Principles in Practice:** In putting our guiding principles into practice, we believe *that inspired people want to give; that building relationships with people will lead to a deeper investment, and what is measured gets attention and what gets attention is achieved.*

The following **practices** allow for our **success**:

- We play as a collaborative team – EWL secretariat and EWL members;
- We communicate effectively and frequently internally and externally;
- We pay attention to detail in all correspondence and record keeping;
- We demonstrate to donors the impact of their grants through excellent storytelling and data;
- We are strategic and measure our results based on the success indicators under our strategic aims;
- We stay passionate and confident in our vision of a feminist Europe and our work to achieve it;
- We develop meaningful partnerships and alliances to deliver actions for social change;
- We create situations where high-net worth individuals can give to the women's movement, and
- We raise the expectations of our organisation in our eyes and the eyes of our donors.

## Roles of Staff and Executive Committee

Under the overall direction of the Secretary General, the Programme Team's key priorities and working areas are proposed by the Programme Director, in consultation with the MCT and Executive Committee where appropriate. Consultants can be hired to bring in fresh thinking and outside expertise, for example research, proposal writing, coaching and training.

The Executive Committee will also play a crucial role including: identification and introduction to prospective funders/donors, solicitations. The following table presents the different and common roles of executive committee and staff responsible for programme and resource mobilisation:

Role	Staff	Executive Committee
Designs/ develops financial resilience and sustainability plan (FRSP)	X	
Approves FRSP		X
Implementation of FRSP plan	X	
Oversees development & implementation of FRSP	X	X
Identifies and solicits funds from external sources	X	X
Works closely with responsible staff members to strategise on specifics of plan		X
Ensures adequate and ongoing communication with donors/funders	X	
Maintains up to date donor lists and relationships	X	
Meets with donors to ensure proper stewardship and donor engagement	X	X
Serves as an ambassador for the EWL at donor-related events	X	X
Commits to developing its own individual plan for involvement in fundraising and resource mobilisation		X
Provides support, trainings, materials and guidance to help executive members meet their individual plans	X	
Donates	X	X



## ▶▶ 3 GOALS AND OBJECTIVES 2016

This section outlines our financial goal for 2016 to financially grow and to help realise the programmes, campaigns and policies of the EWL over the coming five years.

### Financial Goal

The total budget for 2016 year is 1.238.380,27 Euro out of this 199.533,65 Euro will be allocated to programme and resource mobilisation, including all activities and the total salaries of Programme Director, Programme Manager, 30% of the salary of the Secretary General and 10% Finance Manager.

The EWL strategically decided to allocate thus 16,11 % of its annual budget in 2016 to lay the grounds for its financial resilience and sustainable growth over the coming five years. Through EWL's strategic finance (analysis, budgeting and building reserves) the financial goals will be adjusted annually.

### Financial Objectives for 2016

1. The EWL will secure its co-financing which is over 249.500,00 Euro in 2016. Hereby, the EWL reduces its dependency to the European Commission from 79,30% in 2015 to 76,60% in 2016 and increases simultaneously its total annual budget for 2016 to 1.238.380,27 Euro in comparison to 1.197.697,14 Euro in 2015.
2. The EWL starts to build its financial reserve and will start 2017 with a financial reserve of 20,000 Euro
3. The EWL has secured diverse large and multi-year projects which cover 50% of the co-funding for 2017 and reduce the dependency on the European Commission to 70% in 2017.
4. The EWL has a clearer idea of the financial and legal situation regarding the European level Women Fund to start drawing financial plans for 2017.

The EWL and in particular the MCT team will through its strategic finance procedures adjust and project more accurate figures and budgets over the course of 2016.

### **Prospective donors and funders for 2016**

The EWL will approach different funding sources in order to secure the necessary funding to achieve its objectives to grow our total annual revenue to €2 million Euro by 2020 and exploring the ways to create a European Women's Fund.<sup>4</sup>

For 2016 we have prospected the following donors and funders, which will be adjusted and verified if needed during the course of the year.

#### **Public/Governmental Institutions:**

- Hot prospects are for example Norway, Sweden and the Federal States of Germany such as North Rhine Westfalia which have prioritised women's rights and Gender equality.

#### **Public/Private Foundations:**

- Hot prospects are Friedrich Ebert-Stiftung, OSF, Foundation de France, Edge Funders Alliance, Swanee Hunt Foundation, Erste Foundation such as Rockefeller Foundation Novo Foundation

#### **Corporate Sector/Corporate Foundations:**

- Hot prospects are Chanel Foundation, Kering Foundation, Sodexo or consultancies such as Hogan Lovells and Fleishman Hillard

#### **Giving Circles/High-net worthy women:**

- Women Moving Millions, Fondation de Femmes in France and win-win coalition

### **Measures of Activities and Success**

The following are measured activities and successes that are tracked and reported on for the cultivation<sup>5</sup> of donors which means prospecting<sup>6</sup> and stewardship<sup>7</sup> of donors by the Secretary General, Programme Team, Executive Committee and supported by all EWL staff and members:

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<sup>4</sup> The EWL will explore on opportunities to build a European Women Fund which will generate funding and income to distribute to EWL members and women organisations across Europe.

<sup>5</sup> Donor Cultivation: What It Is and What It Is Not, KIM KLEIN. "Cultivation is where you treat the donor like a whole person." Cultivation is what you do to build the loyalty and commitment of the donors to the organisation. More info: [http://www.ncdsv.org/images/Donor%20Cultivation\\_What%20It%20Is%20and%20What%20It%20Is%20Not.pdf](http://www.ncdsv.org/images/Donor%20Cultivation_What%20It%20Is%20and%20What%20It%20Is%20Not.pdf)

<sup>6</sup> Prospecting is gathering relevant information about potential donors and identifying funders and donors who supported, support and potentially would support EWL's case.

<sup>7</sup> At its core, donor stewardship is about progressively building deeper relationships with our donors. That means having a plan in place for thanking, communicating, and interacting with donors in ways that solidify their support over time.

**Activities:**

- At least six calls/month to (new) donors by responsible staff
- Five meetings/month with two permissions to submit proposals and two being stewardship by responsible staff and one by Executive
- Monthly debriefings and joining the dots meetings with responsible staff (in particular, Secretary General, Programme Director and Programme Manager) to review funders/donors prospecting and ensure alignment with EWL’s strategic and campaign goals.
- Holding track and reports on outcomes and results of project proposals
- Holding track of research done regarding existing prospects and opportunities

**Strategic Success Indicators:**

- At least six proposals for foundations have been developed under EWL’s strategic aims of which each will be sent to at least 3 diverse and different funders/donors during the course of the year
- Conduct at least one intimate donor event with around 20 participants during the course of the year

The FRSP will be successful when all staff and their diverse units work hand in hand by contributing to the cultivation of funders and donors. Therefore, it is crucial to measure the work of all teams and members of EWL staff to track record. It is necessary to monitor and to learn for improving the efficiency of joint tools which are at place. The contribution of the Campaigns and Policy Unit (PCT), which also includes the Communication and Media officer, Finance officer (FO) and Membership Coordinator (MC) will be measured in terms of:

Responsible Staff / Unit	Activity	Outcome / Deliverable
<u>PCT Team</u>	Quarterly reporting template designed to gather data around the following questions, but not limited only to <ul style="list-style-type: none"> <li>• How many women were reached?</li> <li>• Who benefited from the funding?</li> <li>• How did our policy and campaigning work influence EU policies and legislation?</li> <li>• How many inquiries of journalists and media did the EWL receive?</li> <li>• How high is the EWL (social) media outreach?</li> <li>• Prospecting two potential events, meetings, donors for the Programme Unit to attend or to start the cultivation process ( online or offline)</li> </ul>	Report in word document to use for evidence based resource mobilisation and advocacy (cultivation of donors)
<u>FO (with the support and contribution of MCT)</u>	Quarterly reporting on: <ul style="list-style-type: none"> <li>• Analysis which captures income, costs and comparison with actuals</li> <li>• Financial health of the organisation</li> </ul>	Tools for strategic finance such as xls sheet with indicators (our three colours alerting tool) and dash board to implement plans that substantiate financial reserves and to establish goals for the following year and to drive resource mobilisation.
MC	Quarterly reporting on: <ul style="list-style-type: none"> <li>• How many joint campaigns did take place within our membership?</li> <li>• What are the outstanding achievements of the joint EWL membership campaigns regarding the lives of women on the grassroots level?</li> <li>• Prospecting one potential event, meeting, donor for the Programme Unit to attend or to start the cultivation process (online or offline)</li> </ul>	Report in word document to use for evidence based resource mobilisation efforts (cultivation of donors)

## ▶▶ 4 CULTIVATION STRATEGIES

Cultivation strategies will consist of social change and vision conversations between the Secretary General, Programme Director, Executive Committee - in particular the President and Treasurer - and potential donors/funders. These conversations can take place in different environments with different potential donors such as in their venues, at EWL offices, at events, by hosting dinners, engaging in thematic-specific meetings etc.

The responsible staff and the executive committee will meet with top prospective donors for vision sharing conversations (i.e. What is your vision of the world? What do you think about the EWL? What do you think is the potential of the EWL? What do you think is our added value, our most important contribution? What could hold us back? Where and with whom do you think we could have a win-win partnership? What are you learning from the feminist debate globally? Which areas of EWL's work stands out for you and why? Ideally, which one we should focus on? What one change would you make?).

The purpose of these conversations will be to:

- Find out what the prospect is interested in and what excites them
- Find out in what capacity or way they can get involved with us
- Find out their past patterns of giving (to what and how much)
- Find out if they know other potential donors/funders

The EWL strategically decided to **diversify its funding** channels which ultimately leads to prospecting of potential funders, across different funding sectors, e.g. multilateral, bilateral and national governments, private and public foundations, corporate sector and International INGOs. In order to diversify EWL funds, the EWL will approach following target groups with following purposes.

- **INGOs:** Place the EWL as the foremost voice within the European feminist movement and engage with wider Civil Society to discuss and create ways of cooperation for funding opportunities;
- **Public/Private Foundations:** Continue deepening existing relationships and opening new conversations for large scale and multi-year programmes under EWL strategic aims;
- **Public/Governmental Institutions:** Enhancing and strengthening the exchange with public and governmental institutions to place the EWL best for funding to reinforce and broaden support for women's rights and to put it as a priority on governments' political agendas;
- **Corporate Sector/Corporate Foundations:** Tapping into new spaces and conversations to interact and build

relationships to explore potential joint programmes, projects and campaigns;

- **Giving Circles/Private Individuals/Wealthy Women:** Raise funds from individuals- high-net worth women and men to create space for individuals to Give and to explore opportunities to create a European-level Women Fund;
- **New Platforms:** Establish strategic partnerships with new online giving platforms such as Catapult and explore best ways to use platforms as a means of unrestricted income.

### Quality of Engagement - Solicitation Strategies

Solicitation strategies will take place according to the wishes of each prospect donor/ funder. However, as a general rule, and wherever possible, solicitation will be through face to face meetings to present the case for support for EWL. Most likely, a written proposal will follow or will be presented at the same time and in accordance to the guidelines of the donor/funder and EWL's strategic aims. Specific proposals will be presented to the donors according to their own interest to try to reach a win-win partnership and will reflect their involvement wishes. Some examples are for instance (but not limited to):

- Invitation to participate in special events of the EWL
- Employee engagement whereby the donor/funder gives funding and the EWL provides opportunities for employees to get involved such as office swaps or mentoring programmes
- Invitations to visit members to see the work we do on national and grass roots level, including our European wide members and their members

### Stewardship and Communication strategies

The EWL website and social media strategy will be an interactive platform for both donors and other stakeholders to meet and exchange information. All donors will receive the communication which includes e.g. bi-weekly digital newsletter and digital reports and publications. The EWL website will be the brochure for donors and funders who will see at a glance the true impact of EWL's programmes and campaigns. The donors and funders will experience our website as an exhibition of success stories and where they feel invited to sense and feel our impact on women and girls across Europe and beyond. All EWL social media and website will integrate its campaign, programme and project success stories and their impacts which will be lively and accessible. The EWL will communicate clear and compelling messages. The EWL will be recognised and acknowledged to be the change maker and agent of change for funders/donors in the field of women's rights and the feminist movement globally.

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