Strategic Action Plan for FTI Resource Mobilization – 2009 /10

Overview & budget – June 2009 until mid-2010	
Goals:	Fulfill immediate financing gap of 1.2 billion USD of FTI trust funds before end of 2010; 60% of this amount should be raised by December 15, 2009 (phase one of the replenishment)
	Build-up to fulfillment of financing gap of 'several billions' of all FTI endorsed countries - including eligible fragile states - in 3-year financing cycles from 2011 – 2015 (phase two of the replenishment); Phase two will include a pledging conference mid-2010
Strategies	• Show FTI as an effective and efficient mechanism for delivering aid for basic education • Utilize the External Evaluation to reform FTI thus engaging present Donors further and bringing in new Donors
	• Demonstrate FTI results
	• Multi-faceted, comprehensive communications strategy: targeted donor, CSO and media approach – use of high-level spokespersons, calendar of strategic events
	• Repeat FTI's key messages on results, on disbursement, on independent evaluation, on fragile states
	• Be consistent in messages • Identify and pursue opportunities presented by the "One Goal" campaign
Actions:	Immediate actions until mid-2010 listed in action plan
Organization	Core team of: Donor and FTI country representation (TBD); C. Bellamy; R. Prouty, L. English A. Bekkers, A. Touré, S. Barton

Activities by Ms. Carol Bellamy, Senior Advisor for FTI Replenishment Campaign – September / October 2009:

1. Strategy sessions with the EFA FTI Secretariat about donor outreach, in-depth analysis of different donor countries and further planning of replenishment campaign

2. Input to replenishment-related briefing papers, letters and notes

4. Meetings with important constituencies in UK (DfID, civil society, foundations), October 12 and 13, 2009

5. Additional high-level donor meetings and visits, focusing on FTI's existing donor pool, later in the year

6. Assessment, preparation of a custom-made approaches toward, and engagement with potential new donors, including US and G20

7. Advice with regard to implementing Evaluation recommendations in relation to the reform of EFA FTI

Outcome	Actions	Deadline	Person responsible	Resources	Comments
1.Replenishment of EFA FTI Trust funds and implementation of the Evaluation results	a) Strategy sessions with the EFA FTI SEC about donor outreach, in-depth analysis of different donor countries and further planning of replenishment campaign	On-going	CB/SEC	Replenishment core team	Several planning meetings and teleconference have already taken place
	b) Meeting with important constituencies: 1st round of visits to donors in Europe	12 – 13 Oct. 2009 (completed)	CB	Bob, Linda, Angela	
	c) Strategic advice on US outreach	On-going	CB/Bob, Linda, Angela	Replenishment core team	Meeting with USAID and State Department
	d) 2nd round of visits to donors in Europe	Nov. – Dec. 2009	CB	Replenishment core team	Meetings are being requested with various donors for Nov. and Dec.
	e) Implementation of the recommendations from External Evaluation related to resource mobilization	Nov. 2009	Secretariat/ Board		
2. Making the case for replenishment with analysis; data donor and domestic funding	a) Contact FTI endorsed and candidate countries to firm up FTI trust fund requests in 2009 / 2010	31 Aug. 2009 (completed)	Kouassi	Support Olav Christensen (WB)	Include guidance note: re-endorsement of ESP not

					necessary
	b) Overview of countries planning a funding requests	31 Aug. 2009 (completed)	Kouassi	Jointly with Olav Christensen (WB)	
	c) Mapping of FTI countries (current and candidate countries) likely to receive trust fund support, including allocations per country	31 Aug. 2009 (completed)	Kouassi / Bob	Jointly with Olav Christensen (WB)	
	d) Proposal for monitoring ODA and domestic commitments per FTI country	Pending	Olav (World Bank) / Mamadou	Support from consultant (TBC)	
3. Clarity of donor countries and donor entities on commitments	a) Communication by co-chairs to donors (initial consultations) to establish funding commitments for 2009 / 2010	Pending	Co-chairs	Support from Secretariat (Bob / Angela)	
	b) Collection of donor responses to get indication of donor commitments – shared with Secretariat	Pending	Co-chairs and SEC	Support from Secretariat (Linda, Angela, support staff)	
	c) Detailed donor mapping and political analysis (internal document)	1 Aug. 2009 (completed)	Angela		Follow-up with chair once on board
	d) List of priority donor countries for replenishment	Subject to Board and CFC discussions	SEC and Co-chairs		Follow-up with chair once on board
	e) Draft plan with visits of / meetings with donor countries	Sept. 2009 – Joy Phumaphi visits in Spain and Netherlands (completed)	Bob and Co-chairs	Back-up: Angela, Linda For Joy's visits: HDNED staff (Beth King, Robin Horn) and SEC	

		2nd plan: 1 Oct.	SEC and CB		
	f) Plan of approach to new donors	1 Oct. 2009	SEC and CB	In coordination with co-chairs	External advice + contacts necessary; follow-up with chair once on board
	g) Follow-up to ensure close interface with IDA and upcoming IDA replenishment	1 Oct. 2009 (Ongoing)	Bob / Linda	Consultant (Paul Isenman), in coordination with HDNED / Bank staff	In consort with World Bank senior management and co chairs and Board members liaising with IDA Deputies
4. Campaign messages	a) Core messages/"ASK" document: A Fast Track to 2015, Educating the world's children for a better future	1st draft: 1 July 2009 2nd draft: 1 Sep 2009 Final Printed document: 28 Oct. 2009 (completed)	Linda / Angela / Aby	Collaboration with co-chairs, SARC and chair once on board	Input from donor partners welcomed
	b) Welcome the Evaluation and implement the recommendations		SEC		
	c) Talking points on disbursement (to be shared with Board and donor partners)	1 Aug. 2009 – completed (used for annex to "ASK" document)	Angela / Kouassi	Bob/Linda	Input from donor partners welcomed

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		Revised version prepared on 14 Oct. 2009			
	d) Publication and talking points on economic arguments to invest in education (relation crisis)	15 Sept. 2009 (parts completed and used in ASK document)	Linda / Aby	Input: Richard Johansen's paper. Help of external copyeditor	
	e) Talking points on results of independent Evaluation	Postponed until publication and discussion of synthesis report (1st internal draft 1 Nov. 2009)	Bob and Co-chairs	Internal task force – lead: Sandra Barton (SEC)	Input from Board, task team and donor partners
5. Set up of financial structure	a) Proposal for new FTI trust fund set up: one virtual fund with promissory notes / long-term commitment, accounting of "in-kind" contributions	15 Dec. 2009 (depends as well on solution for ETF for interim financing)	SEC (Palak, Kouassi) and WB (Nancy Pinto, TF Dept)	Input co-chairs and donors	Input chair once on board
6. Strategic communications strategy	a) Planning of outreach events / calendar with high-level events FTI could use b) EFA FTI roundtable at WB Annual Meetings in Istanbul	Ongoing (see annex) 4 Oct. 2009 (completed)	Angela / Aby / Linda SEC: Angela / Aby, WB / HDN Staff	Input and review by co-chairs and Board Collaboration with Co-chair(s), CSO partners, CB	Reviewed by chair once on board
	c) Explore champions and high-level spokespersons (including from developing countries)	4 Jan. 2010 (Draft completed and shared with various donors) CB hired per 1 Sept. 2009	Angela / Linda	Input co-chairs and Board	Shared with various donor partners

	d) Approach of preferred high-level spokespersons	1 Jan. 2010	Various Board members (donors)	Support: Linda, Angela, CB	Input by chair once on board
	e) Engage with ONE Goal Campaign	1 Dec. 2009	CB/SEC: Aby/Angela + GCE (Lucia Fry & Owain James)	Input CB, co-chairs	
	f) Targeted outreach to donors (including media plan and CSOs)	1 Dec. 2009 and rolling document	Bob/ Aby / Angela	Input co-chairs, CB and Board	Input by chair once on board
7. Pledging meeting to meet phase 2 financing needs	a) Decision: pledging meeting in June 2010	Board meeting: 4 Nov. 2009	SEC and Co-chairs	Endorsement by Board, input CB – Note prepared by SEC for Board meeting	
	b) Concept note for the meeting	15 Dec. 2009	Bob and Co-chairs	Support: Linda	Input chair once on board
	c) Documentation package for meeting	15 May 2010	SEC	Input Co-chairs and CB	Input chair once on board
	d) Organization of the list of invitees and invites	15 May 2010	Support staff, Linda / Angela / Aby	Hiring administrative assistance for 2 months	
8. Phase two planning	a) Studies / background material necessary for phase 2	1 March 2010	Linda	Support Olav C. (WB)	
	b) Further study on eligibility / prioritization	TBC	Task team prioritization (Sweden)	Hiring of consultant?	Input chair once on board
	c) Review marketing / re-branding	Dependent on 4 Nov. 2009 Board meeting	SEC and Co-chairs / chair once on board	Hiring consultant for professional survey, research among partners and potential partners – support: Angela, Aby	Input Board

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	d) Briefing documents on final results of evaluation	1 Feb. 2010	Bob and Co-chairs	Reviewed by chair once on board/External Task team	
	e) Planning of concluding pledging conference in 2010 including venue	1) Decision on date in Rome: 4 Nov. 2009 2) Decision on venue: 15 Jan. 2010	Co-chairs, chair once on board	Supported by Bob & CB	Input SC / Board of Directors
9. Organization and task division within Partnership	a) Set up of internal taskforce Secretariat	1 July 2009 (completed)	Bob / Linda		Shared with Board and CFC with Plan of Action
	b) Hire a senior advisor or chair for the replenishment process[1]	1 Aug. 2009 (completed)	Bob and Co-chairs		Input by Board and Chair once on board
	c) Budget as part of SEC working plan and financing	To be discussed at Rome Board meeting: 4 Nov. 2009	Bob / Linda and Co-chairs	-Includes extra staff (temporarily)necessary for replenishment tasks -Connected with staff and tasks of Chair	Shared with Board and CFC
	d) Recruitment of temporary staff	1 Sept or 1 Oct. 2009 (completed)	Bob / Linda, support staff		

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[1] Not included in suggested budget