SIXTY-FIRST SESSION OF THE
COUNCIL OF THE INTERNATIONAL BUREAU OF EDUCATION
Geneva, 25-27 January 2012

RESOURCE MOBILIZATION PLAN
International Bureau of Education (IBE)
I. BACKGROUND

The IBE Council at its 60th session requested the IBE Director to produce a draft resource mobilization plan for consideration by the Steering Committee at its session in Geneva on 6-7 September 2011.

This resource mobilization plan (RMP) was developed at a crucial period for the IBE as it has been mandated by the IBE Council to create the conditions to become a Centre of Excellence (CoE). The “Strategy aimed at making the IBE a Centre of Excellence in Curriculum” was unanimously endorsed by the 60th session of the IBE Council and unanimously adopted by the 36th session of the UNESCO General Conference, in November 2011.

The strategy as a CoE implies not only raising the profile of the institution and refocusing its priorities and programmes, but also gradually generating a broader range of quality services. The strategy, thus, requires a significant increase in the total resources of the IBE in order to be able to respond to the rapid and complex areas of curriculum development that are being expressed today in the new demands of UNESCO Member States. As stated in the Strategy:

*The choices for the IBE in this process are clear – it could either tailor its activities to its current resource levels by reducing the number of programmes and focusing on a few priorities, or it could retain (and, as appropriate, expand) its current programmes, enhancing their quality and scope by attracting additional funds. There are significant risks inherent in the first of these choices, most notably that the IBE's involvement in the very complex and rapidly developing area of curriculum would be too limited to warrant broad recognition as a CoE and its overall positive impact on Member States would be diminished. To be perceived by stakeholders and other expert groups and institutions as a credible CoE, the IBE should therefore choose the second option, undertaking a broad range of functions … and providing a broader range of high quality services to Member States and other clients. (CoE Strategy, p. 2)*

This resource mobilization plan will therefore support and complement the implementation plan (IP) of the IBE Strategy that aims to raise IBE’s profile as a leading institution in the field of curriculum. The draft implementation plan was discussed by the Steering Committee meeting, in September 2011.

II. OBJECTIVES

The objectives of the RMP are:

1. To increase the IBE core funding in order to strengthen the institution and provide the means to become a CoE.
2. To increase IBE’s extra-budgetary funding in order for IBE to further undertake projects to support the Member States within the framework of UNESCO’s priorities and in partnership with other UN organizations.
3. To institutionalize resource mobilization as a key function and source of expertise in the organization.

III. A STRATEGIC DIRECTION: IBE AS A CENTRE OF EXCELLENCE

Since 2000, the IBE is the only institution with a global mandate to specialize in curriculum. Today, the IBE faces the challenge of reaffirming and reinforcing its identity and strengthening its role as a forward-looking and cutting-edge institute that will develop
programmes and services that are relevant and responsive to the needs of the Member States, innovative and effective in nature and, above all, of high quality.

The external programmatic review, conducted in May 2011, pointed out the general relevance of the programmatic orientation of the IBE with regard to what a CoE should be. The Audit report shows that the financial administration is running appropriately. Nevertheless, both the Audit and the Rapid Organizational Assessment (ROA) refer to a possible financial fragility as a result of a drop in the level of financial contributions in 2010 due to the financial crisis. Paradoxically, the CoE Strategy requires increased and predictable financial resources. The ROA therefore, puts forward that sustainability issues must be addressed urgently in the transition phase. Currently a very small team is trying to deliver a large number of activities to a very wide range of countries with a demand that exceeds its actual capacity in terms of human resources and funds. Additional financial resources other than the ones currently available for 2012 and beyond are a key factor for the success of the new strategy.

To become a CoE, new conditions (both programmatically and organizationally) will be progressively put in place. Institutionalizing resource mobilization as a core activity of the IBE to ensure long-term sustainability is one of those steps for change. Past experience shows that fundraising is not one person’s task at a certain moment, but a continuous team effort which yields better sustainable results. This is why the IBE is proposing to establish a Resource Mobilization Team that will be charged with implementing this strategy, with at least one person dedicated to this task on a regular basis.

IV. THE RESOURCE MOBILIZATION TEAM

The IBE resource mobilization plan is intended to last 4 years. RMP for the organization will become a permanent line of work and a team effort. The President of the IBE Council, Council members, the IBE Director and staff will all work together, in varying capacities, to ensure that the institute meets its fundraising targets each year. As a first step, the proposed plan will require formalizing a team approach that must be agreed upon early on in its implementation. This means that all members of the team will be in agreement of their roles and responsibilities and meet the targets set out for them to achieve.

Execution of the strategy will be carried out through two key developments:

1. Firstly, fundraising will be institutionalized through the creation of the Resource Mobilization Team that will agree on a clear division of tasks and a timetable.
2. This team will be coordinated by the IBE Director and will report twice a year (to the IBE Council and to the Steering Committee). An IBE programme officer will work directly with the Director to support the team and facilitate the implementation of the fundraising strategy.

Members and Roles:

Resource mobilization will have a team composed of:

- Director of the IBE – To be head of the fundraising team
- IBE assistant - BARD
- Programme Specialist to support the Director at the IBE

---

1 The first draft of the report of the external auditor expressed: « La proposition du Commissaire aux comptes est donc une opinion sans réserve pour les états financiers du BIE au 31 décembre 2010 » (11 May 2011)
- The President of the IBE Council
- Fundraising committee: to set targets and review fundraising progress, a fundraising committee will be created during the 61st Council, composed of the members of the team and three additional members of the Council, who will contribute directly and proactively to resource mobilization. Subsequently, the committee will meet twice a year (during the Council meeting and the Steering Committee) to do the follow-up, make propositions and approve the plan of action for the coming year.
- IBE staff members, who support the efforts of the fundraising team, will produce project documents to submit to potential donors.

V. THE RESOURCE MOBILIZATION PRINCIPLES

The vision, mission, goals and strategic priorities of the organization inform the IBE resource mobilization activities. Efforts will be made to ensure that the values, identity and integrity of the organization are always respected in the process. Essential features of the IBE fundraising strategy include that:

- The IBE will seek funding to develop work within its three programme areas and on a global, regional and national basis. Funding should be in line with the agreed strategies for the IBE’s work, which mainly includes capacity building, technical assistance, policy dialogue, research and publications, and networking.
- The RMP Team will establish contact with the Member States to ask for support and will keep them well informed of the IBE’s progress in the implementation of the strategy.
- An advocacy and communication strategy will support the RMP.
- Time will be invested in planning, preparing, identifying, and building relationships with new prospective donors.
- In as far as possible, the IBE Director will use her official missions as opportunities for resource mobilization.
- Project fund raising will take place across the IBE with various individuals involved. Effectiveness of this approach and opportunities for synergies will be reviewed.
- In developing funding proposals, the IBE will take into consideration its capacity to implement and manage the proposed projects.
- When negotiating with donors, the IBE will ensure that the terms and conditions of funding agreements, procedures and reporting schedule are mutually acceptable.
- The IBE will seek to develop relationships and partnerships with major donors. This will be achieved through a comprehensive communication strategy that seeks to understand each other’s work and values.
- The IBE will not discourage donor-sponsored programmes as long as they fit in with the organization’s overall mission and there is appropriate institutional capacity to support the implementation of such programmes. It will, however, scrupulously avoid donor driven initiatives that do not fit into the IBE strategy.
- The IBE fundraising strategy will be shared and coordinated with UNESCO Headquarters.

VI. THE IBE’s BUDGET STRUCTURE

The IBE budget structure includes:

1. UNESCO allocation (from UNESCO regular budget)
2. Core donors’ voluntary contributions
3. Other extra-budgetary resources
4. Other incomes (e.g. cost recovery policy)
1. UNESCO financial allocation:

UNESCO’s financial contribution to Category 1 Institutes tends to be a stable amount. It was increased from US$2,295,000 in 2008 and 2009 to US$2,400,000 in 2010 and 2011, covering mostly the salaries of UNESCO regular staff. The 36th session of the General Conference approved US$2,500,000\(^2\) (on an annual basis).

2. Core donors’ voluntary contributions:

The main source of funding for programme activities is based on core donors’ voluntary contributions. This amount dropped in 2010 and needs to be expanded over time by diversifying and increasing the donor contribution base and by establishing multi-year commitments. Switzerland, Sweden and Spain have been contributors until recent years, but major efforts need to be concentrated on raising this source of funding by approaching new Member States to become IBE donors. New efforts involve seeking new bilateral donor contributions both from traditional and non-traditional donors. Members of the IBE Council should have an active role in this regard. Despite the economic crisis, the IBE is well positioned due to the support that it receives from Member States to become a CoE and its contribution to EFA goals that specifically contribute towards improving the quality of education through quality curriculum.

The efforts to seeking bilateral donor contributions may include approaching representatives of Member States at the IBE Council and at UNESCO to help initiate contact; followed by approaching Ministries of Foreign Affairs, development agencies and Ministries of Education. This is a role to be taken by the IBE Director along with the President of the IBE Council and some other delegated representatives of Member States. The ADG/ED can also play a role in directing attention towards IBE’s role as a CoE in curriculum related matters when approaching possible donors.

3. Extra-budgetary funding:

Besides voluntary contributions, getting extrabudgetary funding is also very important. In this regard the IBE Director and the fundraising team are continuing to contact and further address multilateral organizations such as the Global Partnership for Education\(^3\), the World Bank, the Inter-American Development Bank, UNICEF, the African Development Bank, and the OPEC Fund for International Development and the Asian Development Bank.

Other extra-budgetary resources include various sources of funding such as: a) projects financed through UNESCO’s extra-budgetary funds (e.g. UNAIDS, CAP, CapEFA; b) technical assistance to Member States financed by other international organizations, the private sector, Ministries of Education, national or regional offices; c) partnerships with UNESCO regional offices for long term capacity development and training.

This type of extra-budgetary funding has considerably increased in the last four years, reaching over US$500,000 in a single year. There are several reasons for this, including: a) the IBE’s most recent approach to prefer longer term technical assistance projects that are fully funded; and b) new partnerships being developed that bring financial contributions associated with capacity development services provided by the IBE. The IBE leadership team has an important role in this respect. These projects are highly technical and require specialized expertise in the project design and negotiation; here IBE programme/project

---

\(^2\) There has been however, a reduction of 31% on the approved amount. This poses an additional challenge for the IBE and the fundraising efforts.

\(^3\) Previously known as the Education For All – Fast Track Initiative (EFA – FTI)
coordinators have proactively contributed to the rise of these sources of funding and will work closely with the Fund Raising Team to share this expertise.

The following is a more detailed extra-budgetary project list:

1. Projects financed through UNESCO special project funds (HIV-AIDS, CAP-EFA)
2. Projects financed directly by Member States
3. Projects financed by Member States through the national or regional offices
4. Projects financed through partnerships with other UNESCO Institutes, National or Regional Offices or with other multilateral agencies
5. Projects financed by other stakeholders (e.g. FTI) through partnerships with other Research institutes, National or Regional offices
6. Projects financed by the private sector

4. Other incomes-cost recovery:

In the last three years, IBE has put in place a cost recovery policy, including programme support cost (13%) that is now in full implementation. Additional income comes from the rental of the conference room and office space. There has been an increase in this type of income that will be sustainable over time and continue to increase with expanded activities.

VII. RESOURCE MOBILIZATION TARGETS

The estimated financial implication for the implementation of the Strategy indicates that total resources for the IBE should reach US$7,000,000 by 2014; this means an increase of nearly US$2,000,000 annually. This estimate does not include the ICE⁴. It should be noted as well that the currency exchange rate of US$ to CHF can alter estimations due to the (current) strong value of the Swiss franc.

Table 1: Core funding targets

<table>
<thead>
<tr>
<th>RESOURCES TO BE MOBILIZED (US$)</th>
<th>UNESCO ALLOCATION (US$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10'000'000</td>
<td>5'000'000</td>
</tr>
<tr>
<td>20'000'000</td>
<td>10'000'000</td>
</tr>
<tr>
<td>30'000'000</td>
<td>15'000'000</td>
</tr>
<tr>
<td>40'000'000</td>
<td>20'000'000</td>
</tr>
<tr>
<td>50'000'000</td>
<td>25'000'000</td>
</tr>
<tr>
<td>60'000'000</td>
<td>30'000'000</td>
</tr>
<tr>
<td>70'000'000</td>
<td>35'000'000</td>
</tr>
<tr>
<td>80'000'000</td>
<td>40'000'000</td>
</tr>
</tbody>
</table>

2011 2012 2013 2014

VIII. PRIORITIES AND TYPES OF FUNDING TARGETED

The purpose of the RMP is to develop a comprehensive approach that identifies and sets out the process, sources and activities to mobilize all financial types of resources for the IBE. It is

⁴ Estimated budget for the ICE amounts to US$2,000,000.
a strategy that aims to involve the Member States in the core funding more decisively, but will also move beyond statutory sources of funds to also reach international donors (multilateral and bilateral, regional banks, private foundations, private corporations), and possibly at some point individual philanthropists for more extra budgetary funding.

In the year 2011 and following into 2012, priority will be given to:
- Mobilizing Member States’ funding for the core budget as a manifestation of support and trust to the implementation of the new CoE strategy.
- Extra-budgetary funds from Member States for specific projects.
- Extra-budgetary funds from special financing lines of UNESCO and partnerships with UNESCO institutes and bureaus.
- Extra-budgetary funds from partnerships with other UN agencies.
- Multilateral donors and private sector through specific projects.
- Swiss private donors.

IX. POSSIBLE SOURCES OF FUNDS AND RESOURCES BY ORDER OF PRIORITY FOR 2011-2012

All potential donors will require a specific advocacy and communication strategy to provide awareness and information about the IBE as a CoE. The order of priority will be as follows, (please note that this list is not exhaustive):

1. **Member States:** One example of clear proof that the countries believe and trust the IBE would be to agree to make a contribution whether institutional or for a particular project. The President of the IBE Council will call on Member States to contribute. A possible scale for contributions can be established. Based on first contact, a priority list will be established to pursue negotiations. Nevertheless, a priority order for contacting countries in 2011-2012 could be as follows: 1-Norway, 2-Denmark, 3-Finland, 4-Netherlands, 5-Switzerland, 6- Bahrain, 7-Kuwait, 8-Spain, 9-Germany, 10-USA, 11-India, 12-Brazil, 13-Republic of Korea, 14-Monaco, 15-China, 16-Cameroun, 17-Benin, and 18-Tanzania.

2. **UNESCO Headquarters additional funding mechanisms.** UNESCO has several mechanisms through which additional funding can be obtained through the presentation of projects:
   i. Funds coming from UNAIDS: previous UBW to become UBRAF (United Budget Results and Accountability Framework) for HIV AIDS projects.
   ii. Complementary Additional Programme (CAP).
   iii. Cap-EFA.

The RM team will explore and strengthen relationships with extra-budgetary instances at Headquarters knowledgeable of funding opportunities and donors’ priorities, such as CFS- Multilateral and private funding. Continuing the strengthening of relations with the regional and national offices is another way to jointly implement activities and services.

3. **Extra-budgetary funds from partnerships with other UN agencies such as UNAIDS, UN-WOMEN, UNICEF, UNDAF, INEE.**

4. **Multilateral donors: Global Partnership for Education** The IBE has participated in the first and second round of stakeholders’ consultations and sent a results-based

---

5 Previously known as the Education For All – Fast Track Initiative (EFA – FTI)
proposal contribution to the Learning Outcomes seeking partnership in the Global and Regional Program (GRA). **The World Bank:** First contact was established by the IBE Director with the Director of the Human Development Network to discuss work on quality and possible developments towards the ICE. **Organization of Ibero-American States (OIE):** Agreement of Cooperation established to frame joint collaboration. Through OIE funding, the IBE is implementing capacity development workshops in inclusive education customized to participating Latin American countries. **The OPEC Fund for International Development (OFID):** An initial approach was made by the IBE Director and a proposal was developed.

5. **Swiss Foundations:** The French-speaking foundations interested in education and HIV & AIDS have already been identified.

6. **Bilateral donors for specific projects:** Such as AECID (Spain), SIDA (Sweden), CIDA (Canada), EU (Belgium), IDRC (Canada), SDC (Switzerland), DANIDA (Denmark), USAID (USA), NORAD (Norway), GIZ (Germany), JICA (Japan), Dutch Ministry of Development and International Cooperation. A list of bilateral donors plus funding priorities should be investigated annually and appraised periodically. The IBE will need to establish relations to try to secure short as well as long term donor support for programme and institutional development. Organize fundraising trips at least once a year to fundraise and update donors of IBE progress.

7. **National and interregional banks:** Inter-American Development Bank (IADB). The IBE Director met with the Director of Education in Washington DC, the outcome being that the IADB will cover fellowships for Latin American participants in the IBE Diploma on Curriculum Design and Development covering the participation of several countries in the region. **Asian Development Bank. African Development Bank.**

8. **International Foundations and trusts funds** such as the Ford Foundation, Gates Foundation, Macarthur Foundation, Hewlett Foundation, Packard Foundation, Guggenheim Foundation, Cadbury Trust.

9. **Private corporate sector:** Body Shop, Coop Bank, Microsoft, Coca Cola Private Corporations, Procter and Gamble, Baume et Mercier.

**X. RESOURCE MOBILIZATION ACTIVITIES FOR 2011-2012 AND RESULTS**
(see table)
<table>
<thead>
<tr>
<th>N°</th>
<th>Activities</th>
<th>Responsible</th>
<th>Submitted for funding USD</th>
<th>Funds raised</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>MoU with Iraq Office. New Iraqi Curriculum Project</td>
<td>Acedo, Georgescu</td>
<td>1.300.000</td>
<td>1.300.000</td>
</tr>
<tr>
<td>2</td>
<td>Meeting in Paris with Council Members for fundraising awareness</td>
<td>Ole Briseid, Qian Tang</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Elaboration of the Resource Mobilization Plan</td>
<td>Acedo, Alama</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Fundraising Meetings with country representatives (Bahrain, Brazil, Finland, Denmark, Germany)</td>
<td>Acedo, Ole Briseid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Meetings with Norway (Oslo) partners and stakeholders.</td>
<td>Ole Briseid, Acedo</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Design and submission of HIV-AIDS project proposal for UBRAF</td>
<td>Alama, Bonnet</td>
<td>200.000</td>
<td>200.000</td>
</tr>
<tr>
<td>7</td>
<td>Meetings with BREDA Director, Chief of TED. Funding of African participants fellowships for the Diploma. Establishing joint work plans for the 36 C/5</td>
<td>Acedo, Opertti</td>
<td></td>
<td>85.000</td>
</tr>
<tr>
<td>8</td>
<td>Global Partnerships on Education. Round of Consultations and Proposal</td>
<td>Acedo, Alama</td>
<td>1.600.000</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Proposal submitted to GASERC</td>
<td>Opertti</td>
<td>350.000</td>
<td>350.000</td>
</tr>
</tbody>
</table>

| 2012 | Constitution of the fundraising committee. Definition of roles and targets | Council              |                           |              |
| 2  | Follow up with member states for voluntary contributions                  | Acedo                |                           |              |
| 3  | Follow up with member states to support specific projects                 | Acedo, Alama         |                           |              |
| 4  | Meeting in Washington for the Global & Regional Activities Program        | Alama                | 1.600.000                 |              |
| 5  | Contacts with a selection of Swiss foundation for possible collaborations | Alama, Nicollin      |                           |              |
| 6  | Submission of HIV-AIDS project for OFID (OPEC Fund for International Development) prepared in 2011. | Alama, Bonnet        | 1.200.000                 |              |
| 7  | Contact EU for specific projects (FAFA framework)                         | Alama                |                           |              |
| 8  | Inter-American Development Bank. Commitment for Fellowships for the Diploma | Acedo, Opertti       |                           |              |

**TOTAL FUNDS RAISED** 1,935,000

(1) Budget allocated for 2011-2013
(2) Budget allocated for 2012-2013
(3) Budget allocated for 2011
(4) Budget allocated for 2011-2012