



**CONSULTANCY FUNDRAISING  
ALIANZA/ACTION AID PROGRAM ASSESTMENT**



Alianza por La  
Solidaridad

Member of  
**act:onaid**



Alianza por la  
Solidaridad

Member of

actionaid

## CONTEXT

- Alianza por la Solidaridad is a non-governmental organization born in Spain. For more than 30 years we have been fighting for women's rights and rights related to land and the environment, helping to improve the situation of thousands of people in the five continents.
- Since September 2018, we are members of the International Federation of Action Aid, which has allowed to expand our influence to more than 50 countries.
- In 2018 a trilateral funding agreement was signed by Action Aid Italy (hereinafter AA Italy), the GS (General Secretariat of Action Aid) and Alianza por la Solidaridad (hereinafter APS), through which AA Italy compromised to provide the necessary resources in the form of a loan to develop the fundraising program of APS until it's self-sustaining. This agreement was supported by a 10-years Business Plan based on the analysis and assumptions established by the Daryl Upsall & Associates consultancy commissioned by Action Aid. The assumption within the original agreement was that funds would be provided in 4 years with repayment to be made within 3 years, from 2023 to 2025 (back to the Global Secretariat in the form of International Contribution.)
- The initial agreement provided for a total investment of 2,5 million by AA Italy (2 million € grant, 0,2 million € direct support costs by AA Italy as the investor and technical provider, plus 0,3 € indirect Italian costs incurred).
- Following the agreement, the fundraising department of APS was created mid 2019.
- The covid-19 hit particularly hard the fundraising activities of the organization as from March 2020 (being F2F the sole source of acquisition). On this new context both, Italy and APS set up a contingency plan aimed at offsetting the economic impact in the Business Plan by exploring other sources of acquisition (digital). Results have been promising but given the new circumstances, doubts have emerged questioning the viability of the overall project
- This has included (but not limited to) a continuing deterioration in the overall breakeven point of the project, and reducing returns since the inception of the agreement
- Therefore, it has been agreed to seek external independent input to enable to understand if on the current context it is possible to keep a sustainable fundraising presence in Spain and if so, which is the right way to do.

**Comentado [KL1]:** Please add in years. This is helpful context to explain what the 10 year plan actually entails

#Comienza la transformación





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## OBJECTIVE

Based on the previous rationale, it was agreed to appoint an external fundraising consultant with solid Spanish market expertise who helps us to determine the viability of the project:

- a) how the Spanish market has evolved post covid, barriers and opportunities.
- b) review/analyse the APS business case (created in 2018 and lately revised in 2020).
- c) In case the business plan is not viable any longer, explore what are the alternatives.

## EXPECTED OUTPUTS

- Analysis of the Fundraising Spanish Market: main changes brought about by the Covid crisis, plus other external relevant factors (supplier availability/supplier changes, other legal, political, economic factors) (quantitative and qualitative analysis).
- Deep revision of the Business case 2018 and the latest BP worked out in 2020 as to understand:
  - a. If the forecasted acquisition rhythm (volume, attrition rate, monthly gift evolution, year on year growth and acquisition costs) is realistic given the current circumstances.
  - b. If the forecasted returns are realistic given the current circumstances (ROI per donor at a channel level, plus the overall ROI of fundraising programme), plus how to maintain/improve these ROIs in the future
  - c. If the strategical approach is correct in terms of channels and sources of acquisition. Plus a prioritisation in terms of which channels can provide the greatest scale and highest ROIs
  - d. The gap (if any) between the Business case and a more realistic scenario (if there is any).
- In the case the current BP is no longer viable, to explore other possible scenarios that could allow APS to keep its fundraising investment in the Spanish market in a sustainable way (with special focus on the level of investment and ROI, and ability to generate unrestricted returns).

Comentado [KL2]: Plus others?

Comentado [KL3]: It would be helpful to articulate what some of these scenarios could be and be clear that these are not the only scenarios. It helps to articulate the bigger picture.

## REQUIRED PROFILE

- Proven expertise (+10 years) in the Fundraising Spanish Market (deep knowledge of metrics and key performance indicators).
- Expertise in building up robust, data driven Fundraising Business plans.
- English Professional proficiency.

### **TIMEFRAME**

The consultancy should be undertaken in 3 weeks since the signature of this agreement.

### **BUDGET**

There is not a defined budget, but the cost of the consultancy would be basically within 10.000 euros. Proposal must be submitted according to the requirements established in these TOR's.

The contract will be governed by the Spanish law. The consultant person or firm must be registered as self-employed and be able to issue invoices in accordance with Spanish legislation.

### **OTHERS**

All the documents mentioned (Trilateral, Daryl Upsall & Associates consultancy, BP) will be accordingly provided.