

**Association of Development Financing Institutions in Asia and the Pacific (ADFIAP)**

**STRATEGIC PLAN (2005-2009)**

***“ADFIAP: More Focused and Prepared to Lead”***

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**(ADFIAP)**

**STRATEGIC PLAN (2005-2009)**

*“More focused and prepared to lead”*

**I. Executive Summary**

The Association of Development Financing Institutions in Asia and the Pacific (ADFIAP) is the focal point of and advocate for the development banking and finance community in the region. Founded in 1976, ADFIAP represents over 80 development finance institutions (DFIs), development banks, and other financial institutions engaged in the financing of development in 37 countries across continental Asia and the Pacific.

During the recent months, ADFIAP, led by its Board of Directors, engaged in a participative strategic planning process. The planning process was intensive, introspective and self-critical. ADFIAP revisited and changed its mission and benchmarked it against comparable associations. Candid discussions were held with the Board and the Secretariat to assess the future leadership and advocacy role of ADFIAP and the needs of its members.

Throughout this process, the message was clear and consistent: **“ADFIAP must become an exemplary association, with sustainable development as an advocacy and with member services that are central to all activities.”**

The Board of Directors of ADFIAP heard the message and has developed a five-year plan designed to transform ADFIAP into a **full-service** international association that is open and responsive to the collective interests of its members, constituents and partners. This 2005-2009 Strategic Plan is the product of that message.

Throughout the planning process, five (5) strategic directions have guided the goals and strategies set forth in this Plan for the next five years:

- Association Membership Development
- Policy Development and Advocacy
- Resource Development and Innovation
- Human Capital Development, Professional Standards and Education
- Support of ADFIAP-affiliated National and Sub-regional DFI Associations and Counterpart Regional Associations Worldwide

Success in accomplishing the goals of this Plan will be measured by the extent to which ADFIAP can:

- substantially increase the number of members reflecting the organizational diversity of financial institutions engaged in the financing of development

- effectively engage the diverse constituent interests of members and stakeholders in the governance, guidance and activities of the Association
- develop a high-quality package of Association services and group benefits that meets the needs of the membership
- serve as the leading convenor for exploring and advancing the knowledge and interests of the development banking and finance sector
- initiate, promote and represent policy positions that support and strengthen the work of member-organizations and the development banking community
- significantly increase public and private funding sources for the core operations of the Association and its members
- promote human capital development programs that attract new talent to the field and expand the knowledge and skills of development banking practitioners and professionals
- facilitate the development of credentials and core competencies for development bankers and standards for the certification of DFIs that are widely-accepted and respected throughout the development banking community
- serve as the leading facilitator and provider of development banking training and technical assistance to DFIs and development banking practitioners, especially in the areas of human capital development, institutional partnerships, operations resource development and access to capital for economic development
- enhance, broker and expand technical assistance and training to strengthen the capacity of ADFIAP-affiliated national and sub-regional DFI associations as well counterpart regional associations in the world to support and advance sustainable development

To achieve and sustain this ambitious transformation, ADFIAP has adopted this Strategic Plan, and the accompanying Operating, Organizational and Resource Development Plans that will guide its phased implementation over the next five years. These mission-driven plans will guide the restructuring of the organization; the reconfiguration of staff; and the development of a broad, sustainable funding base for the Association.

Not all recommendations received during the planning process were able to be included in the Strategic Plan and its companion plans. Some desired outcomes, such as a wide-ranging intra-country investments and business deals among members, will require additional work and consideration of fundamental changes not within the scope of this process. It is nevertheless the commitment of ADFIAP to continue work during the

transition period ahead to identify areas of change necessary to fully realize the goals of this 2005-2009 Strategic Plan.

The completion of this strategic planning process heralds a ***new*** ADFIAP – ***more focused and prepared to lead***. As development financing in the region enters its sixth decade, ADFIAP is committed to developing the capacity and the creativity to support and advance the work of DFIs and other financial institutions engaged in the financing of development toward meeting the objectives of the sustainable development agenda.

## **II. Statement of Values**

ADFIAP is deeply-rooted in a set of values that guide and define every aspect of its work:

- *Fostering Responsible Leadership*
- *Practicing Integrity, Equity, Fairness and Accountability*
- *Championing Diversity*
- *Building Linkages and Partnerships*
- *Promoting Creativity and Innovation*
- *Investing in Education and Advocacy*
- *Achieving Sustainable Development*

## **III. Statement of Vision**

Through the provision of development finance services by its members, ADFIAP envisions a future of lasting economic development and growth in the region, with its people as the ultimate beneficiary.

## **IV. Statement of Mission**

ADFIAP's mission is *to advance sustainable development by strengthening the development finance function and institutions, enhancing capacity of members, and advocating development finance innovations*. With this new mission, ADFIAP believes that it is addressing the twin aspects of its existence: (a) being continuously relevant to its members, constituents and partners, and (b) being in the mainstream of an ever-changing and dynamic global and national environment. ADFIAP fulfills its mission of service to its members and constituents through education, resource development, advocacy, networking, training, technology assistance, policy initiatives and strategic partnerships.

## **V. Five-Year Strategic Directions**

ADFIAP is committed to becoming the leading convenor of the development banking and finance community. ADFIAP's central strategic focus is to provide exemplary Association services to its members, constituents and partners. During this strategic planning process, the Board of Directors and Secretariat identified five strategic directions in which ADFIAP has a unique niche and opportunity to bolster the development finance function and institutions. As ADFIAP moves forward into its fourth decade of existence, these five (5) directions will guide the Association as a full-service international association that will strengthen the DFIs, the development banking and finance community, and the constituencies they all serve.

### **1. Association Membership Development**

Provide the development banking and finance community with regional leadership, collaboration opportunities and value-added services, and group benefits responsive to the interests and needs of a broad membership

### **2. Policy Development and Advocacy**

Explore, shape and advance policy and advocacy positions that impact the development banking and finance community and improve the membership's capacity to do the same, and build relationship and partnerships with like-minded international development organizations

### **3. Resource Development and Innovation**

Maintain, expand and innovate on the pool of financial and partnership resources available to support the operations of the Association and its members and undertake sustainable development initiatives

### **4. Human Capital Development, Professional Standards and Education**

Advance the development banking and finance sector by establishing standards, credentials and core competencies; improving the skills and prominence of development banking practitioners; and recruiting and retaining talented and committed individuals in the industry

### **5. Support of ADFIAP-affiliated National and Sub-regional DFI Associations and Counterpart Regional Associations Worldwide**

Preserve and reinforce the role of ADFIAP-affiliated associations in the development banking and finance community in the Asia-Pacific region as well as relate and work with counterpart regional associations worldwide

## **VI. Goals**

### **1. Association Membership Development**

- Build credibility by promoting, marketing and publicizing the successes, activities and positions of the Association and that of its members
- Provide a package of high-quality association services and group benefits that meet the needs of a diverse membership
- Serve as the convenor to explore and advance the knowledge and interests of the development banking and finance community in the region
- Increase the number of members of ADFIAP by 20 percent each year over the next five years

### **2. Policy Development and Advocacy**

- Promote, inform and advocate the broad policy interests of the membership
- Improve the ability of members to influence policy and advocacy outcomes
- Conduct research and develop policy and other initiatives important to the development banking and finance community
- Build relationship and partnerships with mainstream international development organizations

### **3. Resource Development and Innovation**

- Increase and diversify core financial resources for the Association and its members
- Increase and diversify the institutional financing resources available for the Association's programs and projects
- Explore sources of financial and other resources for ADFIAP-affiliated national and sub-regional DFI associations

#### **4. Human Capital Development, Professional Standards and Education**

- Promote human capital development programs that attract and retain professionals to the field and expand the knowledge and skills of practitioners and professionals
- Develop curriculum standards and core competencies for development bankers that are widely accepted and adopted among accredited learning centers and national training partners
- Establish development banking certification standards and credentialing and on-going capacity-building opportunities for DFIs to promote high standards of performance
- Provide and connect members to the “best practices of the industry”
- Expand capacity to facilitate and directly deliver training and technical assistance to serve the immediate and current needs of members and practitioners, especially in the areas of human capital development, institutional partnerships, organizational resource development and access to capital for sustainable development

#### **5. Support of ADFIAP-affiliated National and Sub-regional DFI Associations and Counterpart Regional Associations Worldwide**

- Strengthen the capacity of ADFIAP-affiliated DFI associations to recruit, support and retain members
- Enhance and expand the technical assistance and training capacity of ADFIAP-affiliated DFI associations
- Explore areas of cooperation and joint programs with counterpart regional associations around the world

## VII. Strategies

### 1. Association Membership Development

**Goal No. 1 – Build credibility by promoting, marketing and publicizing the successes, activities and positions of the Association and that of its members**

#### **Primary Strategies:**

- Initiate campaigns, define, celebrate and highlight the successes of the Association, its members and the development banking community through the ADFIAP Awards, the ADFIAP website, publications, etc.
- Cultivate meetings and networking between members and policymakers to promote accomplishments
- Hold conferences and forums to disseminate information on development banking "how-to's" and "best practices"
- Continue the development and dissemination of industry publications, e.g. Journal of Development Finance, ADFIAP Newsletter, etc.

**Goal No. 2 – Provide a package of high-quality association services and group benefits that meet the needs of a diverse membership**

#### **Primary Strategies:**

- Survey and analyze the needs of DFIs, partners and practitioners to design group benefits and services that support and build the capacity of members
- Develop partnerships with institutions and organizations to provide capacity-enhancing benefits and services to members
- Leverage the buying power of the membership to provide vendor discounts and cooperative services

**Goal No. 3 – Serve as the convenor to explore and advance the knowledge and interests of the development banking and finance community**

### **Primary Strategies:**

- Create opportunities for broad segments of the industry to present papers, discuss issues, engage in collaborative relationships and formulate policy initiatives
- Establish mechanisms for members to initiate and respond to legislative and corporate policy issues and/or critical issues impacting the industry

**Goal No. 4 – Increase the number of members of ADFIAP by 20 percent each year over the next five years**

### **Primary Strategies:**

- Review membership eligibility criteria and develop and implement membership recruitment campaigns to encourage participation in ADFIAP by all segments of the development banking and finance community
- Create and implement a specific outreach strategy to attract and recruit members from unrepresented constituencies and geographic areas
- Promote a package of high-quality Association services, group benefits and incentives which meets the continuum of needs of emerging to established DFIs

## **2. Policy Development and Advocacy**

**Goal No. 1 – Promote, inform and advocate the broad policy interests of the membership**

### **Primary Strategies:**

- Expand the monitoring and reporting of legislative policy and regulatory actions affecting the development banking sector
- Increase research and communications to promote the policy interests of the industry
- Cultivate relationships and facilitate meetings for members with policymakers, government officials and the media to advance the interests of the development banking sector

**Goal No. 2 – Improve the ability of members to influence policy and advocacy outcomes**

**Primary Strategies:**

- Position ADFIAP as the leading policy development advocate for the development banking and finance sector
- Provide training to enhance the advocacy capabilities and strategies of the membership
- Identify strategic and tactical allies to support the policy initiatives developed by the membership
- Conduct conference seminar series to increase the policy knowledge and savvy of member organizations and practitioners

**Goal No. 3 – Conduct research and develop policy and other initiatives important to the development banking and finance community**

**Primary Strategies:**

- Expand the research capacity of ADFIAP to analyze and present data on the breadth, depth, strength, and trends in the development banking sector
- Research and analyze information and trends to identify and define development banking policy issues impacting the industry
- Formulate and propose new legislative and policy initiatives that support the development banking sector

**Goal No. 4 – Build relationship and partnerships with mainstream international development organizations**

**Primary Strategies:**

- Re-establish relationship with the Asian Development Bank, the World Bank and other multilateral and regional development financial institutions
- Inventory and study other existing like-minded international development organizations
- Match development objectives and leverage the network and resources of the membership in making joint cooperation proposals with these institutions

### **3. Resource Development and Innovation**

#### **Goal No. 1 – Increase and diversify core financial resources for the Association and its members**

##### **Primary Strategies:**

- Ensure that ADFIAP's membership dues and fees are competitive with comparable associations
- Develop a package of sustainable revenue-generating activities and business undertakings based on the core competencies of the Association, e.g., design training curricula, publications and practitioner tool kits for use by members and other development bank practitioners, design of development banking standards and professional credentialing, event organizing, consultancy, etc.
- Pursue and develop a case for international recognition of ADFIAP by the Philippine government in order to receive incentives and tax exemptions
- Build up a long-term 'members trust fund' to partly finance the operational cost of the Secretariat
- Develop sponsorship marketing programs for the Association's conferences, website and publications
- Convene periodic gatherings to introduce members seeking funding sources to prospective lenders and investors
- Provide training to assist members and ADFIAP-affiliated DFI associations in the negotiation and preparation of funding applications

#### **Goal No. 2 – Increase and diversify the institutional financing resources available for the Association's programs and projects**

##### **Primary Strategies:**

- Expand outreach to and collaboration with non-traditional allies to increase financing resources for the Association
- Research and disseminate models of innovative partnerships that increase access to funding resources for ADFIAP

#### **Goal No. 3 – Explore sources of financial and other resources for ADFIAP-affiliated national and sub-regional DFI associations**

### **Primary Strategies:**

- Advocate support for ADFIAP-affiliated DFI associations
- Expand capacity-building grants to ADFIAP-affiliated associations
- Develop and provide access to a comprehensive base of current information on funding sources and resource development strategies for affiliated associations

## **4. Human Capital Development, Professional Standards and Education**

**Goal No. 1 – Promote human capital development programs that attract and retain professionals to the field and expand the knowledge and skills of practitioners and professionals**

### **Primary Strategies:**

- Promote and market development banking and finance human capital programs to attract investment in the field from among members, intermediaries, funders and other support organizations
- Advocate for the critical need to invest in human capital strategies to sustain DFI capacity in the national level
- Enlist the thinking and perspectives of new and seasoned practitioners in the development of careers throughout the development banking sector
- Expand ADFIAP's capacity for research, information and knowledge-building for entry level and skilled practitioners seeking careers in the industry
- Continue and enhance the opportunities for development banking education and supportive services available to students and career changers

**Goal No. 2 – Develop curriculum standards and core competencies for development bankers that are widely accepted and adopted among accredited learning centers and national training partners**

### **Primary Strategies:**

- Gather input from members, practitioners, academicians, donors, intermediaries and other partners to inform the development of professional standards and core competencies for the development banking and finance community

- Collaborate with colleges, universities and training organizations in the development of curricula focused on DFI standards and core competencies
- Promote the recognition and adoption of professional standards and competencies among academic institutions and national training partners
- Raise the awareness of development banking as a professional field among students, the general public, and the nonprofit, governmental, corporate and philanthropic sectors

**Goal No. 3 – Establish development banking certification standards and credentialing and on-going capacity-building opportunities for DFIs to promote high standards of performance**

**Primary Strategies:**

- Collaborate with members and industry partners to develop certification standards for DFIs and credentialing for development bankers
- Establish the capacity to maintain a regular certification process for DFIs
- Provide and facilitate high-quality technical assistance and capacity- building through ADFIAP and affiliated DFI associations, national training partners and academic institutions

**Goal No. 4 – Provide and connect members to the “best practices of the industry”**

**Primary Strategies:**

- Conduct research and document models, best practices, success stories and experiences of DFIs and development banking practitioners
- Serve as a regional information resource for the ongoing identification, collection, promotion and dissemination of best practices through industry, mainstream, print and electronic media

**Goal No. 5 – Expand capacity to facilitate and directly deliver training and technical assistance to serve the immediate and current needs of members and practitioners, especially in the areas of human capital development, institutional partnerships, organizational resource development and access to capital for sustainable development**

### **Primary Strategies:**

- Enhance the capacity to facilitate and provide technical assistance, specialized training and education programs that meet the variety of interests and needs of DFIs – ranging from emerging to mature organizations – and development banking practitioners
- Develop a "rapid response" technical assistance capacity to provide crisis management services to DFIs
- Establish a support system for mentoring between emerging and seasoned DFIs and practitioners

### **5. Support of ADFIAP-affiliated National and Sub-regional DFI Associations and Counterpart Regional Associations Worldwide**

**Goal No. 1 – Strengthen the capacity of ADFIAP-affiliated DFI associations to recruit, support and retain members**

### **Primary Strategies:**

- Develop membership materials to reflect the connection between ADFIAP and affiliated DFI associations
- Share membership data and facilitate training and technical assistance, where needed
- Provide access to industry leaders and experts for ADFIAP-affiliated association conferences and workshops
- Support ADFIAP-affiliated associations to expand their organizational capacity, develop indigenous leadership and advocate for legislation and policy

**Goal No. 2 – Enhance and expand the technical assistance and training capacity of ADFIAP-affiliated DFI associations**

### **Primary Strategies:**

- Provide training and technical assistance for ADFIAP-affiliated association leaders in the delivery of technical assistance and in their capacity and effectiveness to advance national priorities

- Jointly develop, with academic and training partners and practitioners, appropriate training curricula for use by ADFIAP-affiliated associations and development banking practitioners

**Goal No. 3 – Explore areas of cooperation and joint programs with counterpart regional associations around the world**

**Primary Strategies:**

- Re-invigorate and strengthen the World Federation of DFIs
- Hold constant dialogues with members of the World Federation and come up with a set of joint programs and activities for the benefit of the members