

**ANNEX A**

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

**STRATEGIC PLAN (2005-2009)**

STRATEGIC DIRECTIONS	GOALS	PRIMARY STRATEGIES
<p><b>I. Association Membership Development</b></p> <p>Provide the development banking &amp; finance community with regional leadership, collaboration opportunities &amp; value-added services, &amp; group benefits responsive to the interests &amp; needs of a broad membership</p>	<p>1) Build credibility by promoting, marketing &amp; publicizing the successes, activities &amp; positions of the Association &amp; that of its members</p>	<ul style="list-style-type: none"> <li>▪ Initiate campaigns, define, celebrate &amp; highlight the successes of the Association, its members &amp; the development banking community through the ADFIAP Awards, the ADFIAP website, publications, etc.</li> <li>▪ Cultivate meetings &amp; networking between members &amp; policymakers to promote accomplishments</li> <li>▪ Hold conferences &amp; forums to disseminate information on development banking “how-to’s and “best practices”</li> <li>▪ Continue the development &amp; dissemination of industry publications, e. g. Journal of Development Finance, ADFIAP Newsletter, etc.</li> </ul>
	<p>2) Provide a package of high-quality Association services &amp; group benefits that meets the need of a diverse membership</p>	<ul style="list-style-type: none"> <li>▪ Survey &amp; analyze the needs of DFIs, partners &amp; practitioners to design group benefits &amp; services that support &amp; build the capacity of members</li> <li>▪ Develop partnerships with institutions &amp; organizations to provide capacity-enhancing benefits &amp; services to members</li> <li>▪ Leverage the buying power of the membership to provide vendor discounts &amp; cooperative services</li> </ul>
	<p>3) Serve as convenor to explore &amp; advance the knowledge &amp; interests of the development banking &amp; finance community in the region</p>	<ul style="list-style-type: none"> <li>▪ Create opportunities for broad segments of the industry to present papers, discuss issues, engage in collaborative relationship &amp; formulate policy initiatives</li> <li>▪ Establish mechanism for members to initiate &amp; respond to legislative &amp; corporate policy issues and/or critical issues impacting the industry</li> </ul>

	<p>4) Increase the number of members of ADFIAP by 20 percent each year over the next five years</p>	<ul style="list-style-type: none"> <li>▪ Review membership eligibility criteria (amend relevant Constitutional provision, if need be) and develop &amp; implement a membership recruitment campaign to encourage participation in ADFIAP by all segments of the development banking &amp; finance community</li> <li>▪ Create &amp; implement a specific outreach strategy to attract &amp; recruit members from unrepresented constituencies &amp; geographic areas</li> <li>▪ Promote a package of high-quality Association services, group benefits &amp; incentives which meets the continuum of needs of emerging to established DFIs</li> </ul>
<p><b>II. Policy Development and Advocacy</b></p> <p>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</p>	<p>1) Promote, inform and advocate the broad policy interests of the membership</p>	<ul style="list-style-type: none"> <li>▪ Expand the monitoring and reporting of legislative policy and regulatory actions affecting the development banking sector</li> <li>▪ Increase research and communications to promote the policy interests of the industry</li> <li>▪ Cultivate relationships and facilitate meetings for members with policymakers, government officials and the media to advance the interests of the development banking sector</li> </ul>
	<p>2) Improve the ability of members to influence policy and advocacy outcomes</p>	<ul style="list-style-type: none"> <li>▪ Position ADFIAP as the leading policy development advocate for the development banking and finance sector</li> <li>▪ Provide training to enhance the advocacy capabilities and strategies of the membership</li> <li>▪ Identify strategic and tactical allies to support the policy initiatives developed by the membership</li> <li>▪ Conduct conference seminar series to increase the policy knowledge and savvy member organizations and practitioners</li> </ul>
	<p>3) Conduct research and develop policy and other initiatives important to the development banking and finance community</p>	<ul style="list-style-type: none"> <li>▪ Expand the research capacity of ADFIAP to analyze and present data on the breadth, depth, strength and trends in the development banking sector</li> <li>▪ Research and analyze information and trends to identify and define development banking policy issues impacting the industry</li> <li>▪ Formulate and propose new legislative and policy initiatives that support the development banking sector</li> </ul>

	<p>4) Build relationship and partnerships with mainstream international development organizations</p>	<ul style="list-style-type: none"> <li>▪ Re-establish relationship with the Asian Development Bank, the World Bank and other multilateral and regional development financial institutions</li> <li>▪ Inventory and study other existing like-minded international development organizations</li> <li>▪ Match development objectives and leverage the network and resources of the membership in making joint cooperation proposals with these institutions</li> </ul>
<p><b>III. Resource Development and Innovation</b></p> <p>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</p>	<p>1) Increase and diversify core financial resources for the Association and its members</p>	<ul style="list-style-type: none"> <li>▪ Ensure that ADFIAP's membership dues and fees are competitive with comparable associations.</li> <li>▪ 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.</li> <li>▪ Pursue and develop a case for international recognition of ADFIAP by the Philippine government in order to receive incentives and tax exemptions</li> <li>▪ Build up a long-term 'members trust fund' to partly finance the operational cost of the Secretariat</li> <li>▪ Develop sponsorship marketing programs for the Association's conferences, website and publications</li> <li>▪ Convene periodic gatherings to introduce members seeking funding sources to prospective lenders and investors</li> <li>▪ Provide training to assist members and ADFIAP-affiliated DFI associations in the negotiation and preparation of funding applications</li> </ul>
	<p>2) Increase and diversify the institutional financing resources available for the Association's programs and projects</p>	<ul style="list-style-type: none"> <li>▪ Expand outreach to and collaboration with non-traditional allies to increase financing resources for the Association</li> <li>▪ Increase and disseminate models of innovative partnerships that increase access to funding resources for ADFIAP.</li> </ul>

	<p>3) Explore sources of financial and other resources for ADFIAP-affiliated national and sub-regional DFI associations</p>	<ul style="list-style-type: none"> <li>▪ Advocate support for ADFIAP-affiliated DFI associations</li> <li>▪ Expand capacity-building grants to ADFIAP-affiliated associations</li> <li>▪ Develop and provide access to a comprehensive base of current information on funding sources and resource development strategies for affiliated associations</li> </ul>
<p><b>IV. Human Capital Development, Professional Standards and Education</b></p> <p>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</p>	<p>1) Promote human capital development programs that attract and retain professionals to the field and expand the knowledge and skills of practitioners and professionals</p>	<ul style="list-style-type: none"> <li>▪ 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</li> <li>▪ Advocate for the capital need to invest in human capital strategies to sustain DFI capacity in the national level</li> <li>▪ Enlist the thinking and perspectives of new and seasoned practitioners in the development of careers throughout the development banking sector</li> <li>▪ Expand ADFIAP’s capacity for research, information and knowledge-building for entry level and skilled practitioners seeking careers in the industry</li> <li>▪ Continue and enhance the opportunities for development banking, education and supportive services available to students and career changers</li> </ul>
	<p>2) Develop curriculum standards and core competencies for development bankers that are widely accepted and adopted among accredited learning centers and national training partners</p>	<ul style="list-style-type: none"> <li>▪ 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</li> <li>▪ Collaborate with colleges, universities and training organizations in the development of curricula focused on DFI standards and core competencies</li> <li>▪ Promote the recognition and adoption of professional standards and competencies among academic institutions and national training partners</li> <li>▪ Raise the awareness of development banking as a professional field among students, the general public and the nonprofit, governmental, corporate and philanthropic sectors.</li> </ul>

	<p>3) Establish development banking certification standards and credentialing and on-going capacity-building opportunities for DFIs to promote high standards of performance</p>	<ul style="list-style-type: none"> <li>▪ Collaborate with members and industry partners to develop certification standards for DFIs and credentialing for development bankers</li> <li>▪ Establish the capacity to maintain a regular certification process for DFIs</li> <li>▪ Provide and facilitate high-quality technical and capacity-building through ADFIAP and affiliated DFI associations, national training partners and academic institutions</li> </ul>
	<p>4) Provide and connect members to the “best practices of the industry”</p>	<ul style="list-style-type: none"> <li>▪ Conduct research and document models, best practices, success stories and experiences of DFIs and development banking practitioners</li> <li>▪ Serve as a regional information resource for the ongoing identification, collection, promotion and dissemination of best practices through industry, mainstream, print and electronic media.</li> </ul>
	<p>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</p>	<ul style="list-style-type: none"> <li>▪ 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.</li> <li>▪ Develop a “rapid response” technical assistance capacity to provide crisis management services to DFIs</li> <li>▪ Establish a support system for mentoring between emerging and seasoned DFIs and practitioners</li> </ul>

<p><b>V. Support of ADFIAP-affiliated National and Sub-regional DFI Associations and Counterpart Regional Associations Worldwide</b></p> <p>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 through the World Federation of DFIs</p>	<p>1) Strengthen the capacity of ADFIAP-affiliated DFI associations to recruit, support and retain members</p>	<ul style="list-style-type: none"> <li>▪ Develop membership materials to reflect the connection between ADFIAP and affiliated DFI associations</li> <li>▪ Share membership data and facilitate training and technical assistance, where needed</li> <li>▪ Provide access to industry leaders and experts for ADFIAP-affiliated association conferences and workshops</li> <li>▪ Support ADFIAP-affiliated associations to expand their organizational capacity, develop indigenous leadership and advocate for legislation and policy</li> </ul>
	<p>2) Enhance and expand the technical assistance and training capacity of ADFIAP-affiliated DFI associations</p>	<ul style="list-style-type: none"> <li>▪ Provide training and technical assistance for ADFIAP-affiliated associations leaders in the delivery of technical assistance and in their capacity and effectiveness to advance national priorities</li> <li>▪ Jointly develop, with academic and training partners and practitioners, appropriate training curricula for use by ADFIAP-affiliated associations and development banking practitioners</li> </ul>
	<p>3) Explore areas of cooperation and joint programs with counterpart regional associations around the world</p>	<ul style="list-style-type: none"> <li>▪ Re-invigorate and strengthen the World Federation of DFIs</li> <li>▪ 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.</li> </ul>