



Project Resource Group

A Case Study: The International Vaccine Institute

Much of our partners' experience, as NGO executives responsible for raising significant resources and now as consultants supporting such efforts by our clients, centers on a similar set of dynamic organizations. These organizations typically have proven programs or innovations with immense social value, often on a global scale, and are at a critical juncture in their development.

Pivot points for seeking Project Resource Group (PRG) services vary broadly:

- startup or early stage institutionalization
- new or rapidly growing programs
- a strategic plan requiring additional funding
- social or scientific breakthroughs that could open new funding/partnership markets
- a transition in leadership
- a shift in the existing donor base or desire to identify new constituencies, and/or
- insufficient fundraising staff skill sets or capacity to achieve strategic goals.

Our clients all share a common characteristic, however—a desire to extend the value of the time and talent of key officers and board members. PRG partners excel at helping these leaders meet the challenges of dynamic change in a more strategic way, serving as thought and action partners and, where appropriate, officially representing client officers.

The Client

The International Vaccine Institute (IVI) engaged PRG's services in August 2009, expressing many of the above needs. Based in Seoul, Korea, IVI is the only international organization dedicated exclusively to the development and accelerated introduction of vaccines to combat diseases of poverty in developing countries. IVI is led and governed by world-renowned scientists and has unparalleled bench-to-field scientific expertise. Chartered by the United Nations, IVI is principally funded by the Bill & Melinda Gates Foundation (BMGF) and the government of South Korea, as well as Sweden and other governments; corporations such as GlaxoSmithKline, LG Electronics and Merck & Co., Inc.; and a range of international agencies.



The Situation

Prior to PRG's engagement, a scientific strategic planning process had called for greatly enlarging IVI's work in discovering and introducing vaccines for the world's poorest populations. IVI's Director-General and his scientific consultant invited PRG to collaborate with them and a communications consultant to create a strategic development and communications plan to fully capitalize on the social value of IVI's strategic plan.

In its 14-year history, although a responsible local staff managed in-country fundraising and public relations efforts, IVI had never had a development and communications department designed for global outreach. The Director-General and Deputy Director-General for Finance and Administration personally managed relationships with the Korean Government and all international donors in addition to their scientific and operational responsibilities.

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The Challenge for Project Resource Group

Our challenge was to analyze IVI's development and communications needs and, using this analysis, to design the strategy and structure for a new development and communications department. Further challenges included taking interim responsibility for implementation to capitalize on new opportunities as they emerged and facilitating the hiring of a world-class officer to lead IVI's global outreach. The full process of meeting these challenges has overlapped virtually all of PRG's principal lines of service.

Positioning and Planning: Creating a Strategic Development & Communications Plan

We began by analyzing the needs required to achieve goals and objectives of the IVI scientific strategic plan. To define the universe within which IVI exists, we conducted one-on-one interviews with selected members of IVI's senior staff, Board of Directors, Executive Committee, and Scientific Advisory Board, as well as with principal donors/partners, including the BMGF; institutions with major programmatic overlap with IVI, such as product development partnerships; and prospective donors/partners for current and expanded IVI programs, including bilateral agencies. The interviews showed that while IVI is highly respected in the scientific community and by its current donors, potentially major collaborators and donors had little or no knowledge of the range of IVI's activities or of its striking comparative advantages.

This gap analysis defined specific communications and branding objectives and helped to identify key audiences, markets and partnership opportunities. Using the data collected and the collective experience of the IVI consulting team, we created a strategic development and communications plan to position IVI for maximum advantage with a set of target groups. The plan included a blueprint-level design for a new development and communications department—complete with personnel specifications—to drive achievement of stated goals.

A critical part of PRG's work was eliciting and incorporating input from IVI stakeholders in all phases of the process, including the decision making to create a new department and hire a world class professional to run it—which had major budget implications. Rather than leave a well-documented study with a full set of actionable recommendations on the Director-General's desk, our team supported him and his staff in recommending the plan to the Executive Committee and later to the entire Board of Directors. This process resulted in authorization of the new department and the position of Deputy Director-General for Development and Communications just three months after beginning our work.

Building Internal Capacity: Recruiting a Senior Development Professional

The new development and communications department required a very senior executive who could organize and manage a staff that would double public and private contributions to IVI within three to five years. Composed almost exclusively of scientists, IVI's Board of Directors and Scientific Advisory Committee had little previous involvement in resource mobilization, and the existing development and communications staff was inexperienced outside Korea. Consequently, IVI lacked internal capacity to initiate the process of hiring the key new officer.

IVI's Director-General asked PRG to establish a process for and act as IVI's agent in recruiting the new Deputy Director-General for Development and Communications. Because of IVI's location, its breadth of programs, the need for candidates with skills in fundraising, advocacy, business development, and communications, and the desire to move quickly in light of emerging opportunities, this was not a simple recruitment process.

Based on our expertise as development executives, we developed a detailed position description, created a Request for Proposals to recruit a search firm, and used our global networks to identify a wide universe of firms with successful track records in recruiting similar positions for comparable organizations. We interviewed principals of eight firms and ultimately chose Korn/Ferry International, which had deep experience and relevant networks for conducting the search. PRG acted on IVI's behalf

throughout the process, facilitating IVI's negotiations with Korn/Ferry, ensuring that the Korn/Ferry team understood the special needs of IVI's plan, and encouraging IVI leadership to form a Board-driven search committee. Following a successful search, IVI hired a seasoned professional, with whom PRG worked to ensure a seamless transition leading up to and after he assumed his position in Seoul in November 2010.

Supporting Implementation: Bridging the Interim Gap in Staff Capacity

As the strategic development and communications plan was finalized and it was clear that the search for the Deputy Director-General for Development would not be quick, IVI leaders expressed concern about IVI's capacity to respond to emerging opportunities. They asked PRG to provide bridge support for global outreach until IVI could staff the new department. We filled this gap on a day-to-day basis, working closely with other consultants and coordinating a small action-oriented task force composed of IVI executives, Board members, and consultants.

When IVI Director-General John Clemens received the prestigious Albert T. Sabin Gold Medal in Washington, DC in April 2010, we initiated multiple actions to enhance IVI's visibility among targeted groups. By strategically populating a small luncheon hosted by the Korean Ambassador to the US and arranging separate meetings with other stakeholders, we helped IVI convey its message to key representatives of US government agencies, pharmaceutical companies, vaccine-related advocacy and policy-oriented organizations, and foundations, including new leaders at the Bill & Melinda Gates Foundation. Beyond this broad-based outreach, the events in Washington catalyzed developments toward two specific IVI objectives:

- *Strengthening relationships with the US government*, which was not a signatory to the original UN charter for IVI and whose misconceptions inhibited collaboration between IVI and key US agencies. For the April trip, PRG worked with an IVI Board member in Washington to set up a series of meetings that helped IVI develop or renew relationships with key players. As a result, the Department of State called for relevant agencies, including Health and Human Services, the Food & Drug Administration, NIH and USAID, to meet the following month to discuss IVI's value in achieving US goals. Subsequently, a high-level FDA delegation visited IVI to explore possible joint activities. Efforts are now underway to create an official mechanism to facilitate future collaborations across US agencies.
- *Broadening relationships at the Bill & Melinda Gates Foundation*, which had seen IVI only through the lens of individual scientific grants. PRG developed a comprehensive corporate capabilities statement highlighting IVI's assets across the full continuum of vaccine discovery, development, and delivery. This served to improve IVI's visibility within the BMGF, working with advocacy/policy officers with whom IVI previously had no contact, and to surface the contributions IVI could make in the Decade of Vaccines, an initiative announced by Bill Gates in January 2010. As a result, IVI has been invited to organize and host a high-level meeting with Tachi Yamada, President of the BMGF Health Program, in March 2011 in Seoul to analyze and advance vaccine innovations in Asia.

In a little over a year, PRG worked with IVI not only to develop a strategic development and communications plan, but also to initiate implementation with key audiences and support the recruitment of a seasoned professional to lead future actions.

