



STRATEGIC PLAN **2009-2012**

I. PREFACE

Looking back to the founding of Jubilee USA Network just over ten years ago, much has changed.

We can reflect proudly on some tremendous victories that looked improbable to many when we began this incredible journey. Together, with global partners, we successfully put breaking the debilitating chains of international debt on the agenda of world leaders not once, but twice – in 1999 and again in 2005. Not only did we help turn an obscure economic issue into an understandable concern, we managed to make debt a focal point for public education, mobilization and policy advocacy on global poverty issues.

Together with global allies, we won \$88 billion of debt cancellation to date, which has freed up funds for millions of children to go to school and patients to access healthcare. Much has changed for the better in countries that have seen life-saving debt cancellation. That is cause for celebration.

But as much as things change, they stay the same. Today, the world is confronted by challenges – sometimes called “new,” but really a repeat of similar cycles from not so distant history. Volatility in the price of oil and the rising cost of food in today’s global economy bear many similarities to the trends in the 1970’s when the global debt crisis began. The rising global cost of food – driven in part by speculation – threatens government budgets and peoples’ survival.

Meanwhile, the global economic crisis is front and center in the minds of U.S. residents and the world with rising foreclosure rates and the public bailout of Wall Street, Fannie Mae and Freddie Mac. The economic crisis in the United States is an opportunity to educate Northern campaigners on the links between the domestic economic crisis and the economic policies of the IMF and World Bank that have impoverished many nations in the South.

Jubilee USA Network’s new strategic plan will guide our work to fight global poverty through debt cancellation and a more responsible system of global finance for the next four years. It is based on the experience of our decade-long journey as the U.S. arm of a global movement fighting for global economic justice, and it seeks to address the reality of new global challenges. Our discussions and consultations to develop this plan – which involved member organizations, grassroots supporters across the United States, allies, and global partners – affirmed the significant impact we have already had as an organization over the past 10 years. But we also acknowledge the enormous work necessary to bring ourselves closer to fulfilling our prophetic social justice mission.

With this new strategic plan, we reaffirm our commitment to our original broader vision – the prophetic Jubilee vision of justice and right relationships among people and nations. The Jubilee text from Leviticus envisions a cyclical process of cancelling debts, freeing people from slavery and letting the land lie fallow – this vision incorporates economic justice and stewardship of the land.

For the past ten years Jubilee has focused on debt cancellation. Jubilee South and many of the post-HIPC countries plan to stay with this focus while also reflecting the broader, prophetic Jubilee biblical vision - a vision of a world in which there is enough for all.

Indeed our plan reflects a strong focus on our core competency – building the political will for debt cancellation. We will work to build on our legislative successes over the past two years to ensure that the US funds its existing commitments to debt cancellation, that we win expanded debt cancellation with accountability to help meet the Millennium Development Goals (MDGs), and that we win an official debt audit to look at odious and illegitimate debts.

But we also feel strongly that, building from our core competency, we must also focus on the root causes of indebtedness. Our work in the next four years must even more explicitly look beyond the debt cancellation agenda towards addressing some of the critical emerging global economic challenges that relate to international debt and impede the fight against global poverty. Some of these issues include the need for strong new global rules for more principled and responsible global lending – to avoid the recurrence of the debt crisis, and to avoid the creation of new odious and illegitimate debts.

To avoid the next debt crisis, we must redouble our advocacy for assistance to be provided to impoverished countries in the form of grants, rather than loans. Recognizing the growing impact of climate change on development, we must work to ensure that adaptation to climate change is financed through grants rather than loans based on the reality that the North owes the South a profound climate debt, not the reverse.

We must also more sharply and strategically focus on stopping the heavy impacts that new forms of conditionality from the IMF and World Bank are having. In country after country that has benefited from debt relief, we have heard from governments and civil society that that debt relief came at a tremendous cost, with IMF/WB conditionality undermining many of the possible benefits. This cannot continue.

We also recognize the critical links between debt and trade and seek to develop a strong analytical understanding and greater consensus within the Network regarding the contributions of trade agreements to indebtedness. Finally, we commit to exploring sustainable ways to support efforts by countries in the global South to access and benefit from their own resources, ultimately becoming independent of aid and debt cancellation for development finance.

In moving forward with this agenda, we affirm our unique position as the US arm of a truly global movement. We are proud to be a part of a vibrant, increasingly more coordinated and effective global movement – with partners in more than 80 nations across the globe – challenging crushing debt and working for principled, responsible, and alternative forms of financing for development. We affirm our commitment to build even stronger partnerships with our global allies, taking leadership in our work from our Southern partners most affected by the crisis of debt and an unjust global economic order.

Finally, we affirm that our biggest victories of the past ten years – winning recognition of the debt issue by the G-8, cancelling billions of debt, and passing the historic Jubilee Act in the US Congress – have come thanks to grassroots mobilization and people power. For the broader changes we seek, it will not be possible to win by the force of our arguments and convictions alone. For the next victories, we will need an even broader and more diverse coalition. We remain committed to building a broad, diverse movement for Jubilee justice and right relationships among the world's nations and peoples.

GLOSSARY OF TERMS

WB=World Bank

IMF=International Monetary Fund

FFD – Financing for Development

NC = Network Council, Jubilee USA Network

IFI's = International Financial Institutions

MSIR- Moral and Strategic Imperative on Race, Jubilee USA network

ICCR= Interfaith Center on Corporate Responsibility

IDA = International Development Association, lending arm of World Bank for low-income countries

UNFCCC = UN Framework Convention on Climate Change of the United Nations

MOC's = Members of Congress

LTE=Letters to Editor

GAO=General Accounting Office

HIPC = Heavily Indebted Poor Countries, program of the World Bank to establish terms and conditions for debt cancellation – established 1996.

III. JUBILEE USA STRATEGIC PLAN 2009-2012

Overall Goal: From 2009-2012, Jubilee USA Network will work towards the eradication of global poverty and sustainable development by building a strong movement and political will for total cancellation of unjust debts for developing countries of the Global South without harmful economic conditions. Jubilee USA will also work to achieve new global economic policies and trade rules that eradicate poverty, promote sustainable human development and prevent recurring, destructive cycles of indebtedness.

Sub-Goal #1: Definitive Cancellation of Unsustainable and Illegitimate Debt

By 2015, we will have created the political will for the implementation of an international agreement for expanded debt cancellation for impoverished nations without harmful conditions, which will help enable these nations to meet the Millennium Development Goals (MDG's), and for the unilateral cancellation or repudiation of debt on the grounds of odiousness/illegitimacy in at least 3 cases.

Outcome #1: Win support of the US administration for a new deal on debt, resulting in additional, definitive debt cancellation on the agenda of the G-8 summit by 2010 – 5 years from the MDG deadline. Continue to push for the implementation of a new international agreement through the 2011 summit and on to 2012 when the US will host the G8.

The G-8 has a decisive impact on World Bank, regional development banks and IMF policies regarding debt cancellation. To achieve this goal, we will need to convince the new US administration which takes office in 2009 to take on the policy agenda outlined in the Jubilee Act.

Strategy: Beginning in 2009, our primary strategy will be to convince the incoming Administration to support the agenda for definitive cancellation of unsustainable and illegitimate debt. To do this, we will use a number of tactics, including:

a. Mobilizing direct pressure the new Administration/Treasury Secretary to support the Jubilee Act agenda by:

(1) *In 2009*: work to get an early commitment from the new administration

- In late 2008 and early 2009, advocating with the Presidential transition team to appoint Treasury Secretary and key political appointees in the international affairs section of the Treasury department who support the Jubilee agenda while supporting calls for a new Department for Global Development to which Treasury's function on debt and international financial institutions would be transferred;
- Mobilizing Jubilee partners, allies and supporters to advocate with the new administration through postcards, letter writing campaigns, and call-in days; and
- Organizing a delegation of diverse religious leaders to meet with new Treasury Secretary and advocate for the Jubilee Act agenda representing interfaith as well as African-American and Latino religious communities

(2) *From 2010-2012*: work to get expanded debt cancellation on the agenda of the G-8 summit and hold the G-8 accountable for commitments made in 2010 - 2012

- Working to convince the US administration to raise the Jubilee agenda at the G-8 summit, at the latest by 2010 with continuing/increasing pressure as needed through 2012, when the US will host the summit
- Creative public pressure campaign on President – Encircling the White House/balloons
- Media Outreach – national focus, including Op-Eds by opinion leaders
- Public stunt/demonstration at meeting
- Work with International partners starting in 2009 to pressure all G8 countries
- *With significantly increased resources*:
 - Delegation of Jubilee activists to all G8 summits between 2009 and 2012 in Italy ('09), Canada (2010) and France (2011) – to help raise awareness of the Jubilee agenda

b. [The receptivity to the Jubilee agenda by a new administration will determine how aggressively we will pursue the Jubilee Act.] We will work with Congressional allies to re-introduce and build broad bi-partisan support for the Jubilee Act, leading to passage by the end of 2010. We will work for passage of the Jubilee Act both to increase pressure on the administration to adopt and vigorously promote the Jubilee agenda and to assure a legal basis for the new debt policy by

(1) Grassroots lobbying of MOCs though:

- Lobby Days fall 2009
- Speaking Tours to key districts/states in 2009
- Videoconferencing with local groups and staff to motivate for lobby visits

(2) Media Outreach

- Targeted outreach to key districts (staff)
- LTEs in key districts (local activists)

(3) Outreach to existing and new constituencies. *With significantly increased resources: Engage diverse groups/organizations, such as African communities, develop Muslim resources to advocate with Congress. (MSIR)*

Outcome 2: Win support from the US government for recognition of illegitimate debt and win a comprehensive audit by an official US government agency of past lending to 2 countries by 2010.

Strategies:

a. Get a Bipartisan Congressional request for a GAO audit in 2009

- Work to get key committee leaders and ranking members to write request letter to the GAO
- Jubilee USA grassroots activists ask MOCs to make request
- Media outreach/coverage of countries and specific debts we are targeting in collaboration with South-North campaign on illegitimate debt
- New, quality materials developed on the countries/lending agencies that are the focus of the audit: 1-pagers for roots, longer report for policy and Congressional staff

b. Advocate with the Treasury Department and State Department to support conversations with UN forums and the Paris Club to recognize odious and illegitimate debt

- Advocate with State department and Treasury department officials to take a positive position in support of processes in UNCTAD, the UN Human Rights Council, and the Paris Club to support the recognition of the concepts of odious and illegitimate debt

c. Coordinate with campaigns in other countries. To ensure the US audit supports citizen and official audits within countries in question, partner directly with civil society/government agencies in these countries.

- *Staff travel or delegation to one country that is subject to the audit.-With significantly increased resources*

d. Engage immigrant communities in the US from affected countries

- Bring Southern partners to US for speaking tours in 2009 – 2010 focusing on communities from debt audit nations. Make links to root causes of immigration.

Outcome 3: U.S. is meeting its commitment to fully fund its share of existing debt cancellation commitments under the MDRI by end 2011. [This work is important in its own right as the US is currently in arrears to the World Bank and its cancellation commitment. Our work on this is also critical to our continued credibility because some MOCs have stated that they will not support additional debt cancellation unless we fulfill our current commitments.]

Strategies:

- Work to determine needed level of appropriations each year for US share of debt cancellation commitments
- Lobby directly with key appropriators to assure full funding
- Engage grassroots supporters at key moments in appropriations process
- Partner with ONE, Interaction others following foreign assistance appropriations

Outcome 4: By end 2011, there is greater information on mechanisms for and uses of funds released by debt cancellation, and Jubilee USA has supported civil society in at least 3 countries (post-HIPC) to ensure accountability for the use of funds.

Strategies:

- We will develop grassroots education information on the impact of debt cancellation
- Provide solidarity to civil society such as Jubilee Zambia on their efforts to ensure accountable and transparent use of funds released by debt cancellation.
- *With significantly increased resources, 2 major research projects:*
 - *A major study detailing use of funds released by debt relief in HIPC countries as well as of the oversight mechanisms used in countries to assure accountability of funds*

- *A study which presents innovative models such as trust funds for distribution of funds from debt cancellation in post-conflict or failed states.*

Sub-goal #2: Towards More Responsible Global Finance

By 2015, we will have achieved progress towards a just and responsible international finance and trading framework which allows developing countries significantly greater flexibility to choose just economic policies, independence from foreign assistance, and avoid future debt crises.

NOTE: This sub-goal incorporates the “non debt relief” aspect of Jubilee USA’s agenda which becomes more important in this strategic plan compared to previous years. This agenda responds to the post-HIPC reality that many countries face and the strong trends now pointing towards a renewed developing country debt crisis due to skyrocketing food and fuel crises. This sub-goal also responds to grassroots questions such as how can we prevent the reoccurrence of debt? How do post-HIPC countries develop their economies? How will U.S. domestic economic crisis impact the poorest countries?

This agenda looks at issues that are critical to achieving a just and equitable development and sustainable forms of development finance including vastly increased grant resources and efforts by developing countries to get greater control of their own resources. Among some of the main areas of work in this sub-goal are efforts to:

- Develop support for a global charter for responsible finance, beginning with a strong push to constrain the practices of vulture funds which are undermining the effectiveness of debt cancellation;
- End harmful conditions imposed by international financial institutions on poor countries as a requirement for aid and debt cancellation;
- Avoid new indebtedness by significantly increasing support for grants for social services and stopping loans for adaptation to the climate crisis and in response to the food crisis;
- Prevent trade agreements that lead to greater indebtedness;

Outcome 1: Build Global Support for A Binding Charter for Responsible Lending. The first concrete steps in this work will focus on stopping vulture fund activity, taking advantage of the new openness to stronger financial regulation. By 2012, Congress will pass the Stop VULTURES Act. By 2012, there will be strong global civil society consensus for and at least three governments will be on record in support of strong rules that make global finance more responsible and just, establishing the groundwork for a legally binding framework on responsible lending. There will be progress towards the ultimate goal whereby the voluntary charter evolves into a legally binding framework.

Strategies:

- In 2009 partner with Africa Action, TransAfrica and other interested Network members to expand awareness of and support for vulture funds legislation
- Work with global civil society partners to develop broader international consensus on rules-based framework on responsible lending
- Develop research and materials which build case against current Debt Sustainability Framework and make the case for strong new rules (start with joint briefing paper with Center of Concern)As part of our strategy to attain recognition of illegitimate debt and win globally binding standards for responsible lending, we will work to monitor and influence discussions on these issues within two UN processes:

1. UN Conference on Trade and Development (UNCTAD). In early 2009, UNCTAD will be launching a new initiative to build international consensus on the issues of illegitimate debt and responsible lending.

2. UN Human Rights Commission. The UN Human Rights Commission has appointed an Independent Expert on the effects of foreign debt, Mr. Cephas Lumina, who has a three-year mandate to examine the impacts of foreign debt on human rights. The global consultations he is organizing and the report he is working to produce will help advance global recognition of illegitimate debt and the need for binding standards for responsible lending.

3. In both instances, Jubilee USA will engage with UNCTAD and UNHRC by providing input, advocating with the US administration to support the process (because in many cases the US opposes such efforts), and build awareness about the new program within our network about it.

- Work with the Social Investment Forum and ICCR to develop policies to curtail vulture activity and pressure private banks to adopt them.
- *With significantly increased resources, Outreach to new constituencies. Take advantage of current economic crisis in order to build relationships with new constituencies. Link domestic lending crisis to global economic lending crisis that particularly impact the poor and communities of color, and the need for responsible and just lending policies. (MSIR)*
 - i. *Create popular educational resources for grassroots groups on predatory lending, link to domestic lending practices,*
 - ii. *Enable local Jubilee grassroots chapters to link with groups such as ACORN, COOP America, IPS- United for A Fair Economy, Social Investment Forum, and Center for Responsible Lending. (Note: some regional, some national)*

Outcome 2: Increase Grants for Food/Climate Adaptation. A critical way to avoid further indebtedness is to advocate for grants not loans. Our priority is creating the political will for grants, not loans for climate adaptation and food crisis. It is critical that these grants are provided without harmful economic conditions. Our strongest priority will be to keep the World Bank from making loans for climate adaptation and to build the political will for grants from for adaptation as a first step towards repayment of our ecological debt to the South. We will also work to increase the share of grants in IDA, the low income concessional arm of the World Bank, and towards the abolition of loans from IMF's Poverty Reduction and Growth Facility.

Strategies:

- *In 2009-2010, partner with environmental and climate groups such as Friends of the Earth, Climate Action Network, ActionAid, Oil Change, and Oxfam America to move the World Bank to grants for climate adaptation and increased grant resources for this purpose.*
 - i. *Develop educational materials on the links between climate, debt and poverty*
 - ii. *In 2009 use Ecumenical Advocacy Days to focus on climate and debt*
 - iii. *Work in partnership with allies to achieve policy goals at IFIs and the U.S. government.*
 - iv. *Work with illegitimate debt and climate working group of the South-North campaign.*
- *In 2009, partner with IMF focused groups to highlight the undesirability of IMF lending in response to the fuel crisis*

- Partner with other development organizations- NC members and allies such as ONE, Bread for the World, and INTERACTION on the call for increased grants within IDA. We will ramp up effort by *late 2010/early 2011* to influence IDA 16 negotiations. By *July 2012*, IDA will provide 75-25 grants, up from 50-50.

Outcome 3: End Harmful IFI Conditionality. Ending IFI conditionality is a critical objective in order to prevent future indebtedness. By end 2009, Congress authorizes gold sales for the IMF in exchange for some gold sales going for debt relief and tangible, enforceable restrictions on the IMF's ability to impose harmful economic conditions on poor countries. By 2011, we will have created the political will for strong provisions in the IDA authorization to eliminate harmful World Bank conditionality.

Strategies:

1. *In 2009*, continue to campaign to support expedited consideration for countries stuck in the HIPC process because of excessive IFI conditionality – especially Liberia, Haiti, and DRC.
2. *In 2009*, working with the IMF reform coalition, we will conduct a grassroots campaign targeting Congress to demand gold sales for debt cancellation as well as for an end to the Poverty Relief Growth Facility or specific conditionality.
3. *In 2010*, we launch a major effort to demand fundamental changes in WB policy via the IDA reauthorization in early 2010 (push hard), and win a victory in the 2011 IDA authorization.
4. *With significantly increased resources*,
 - *As part of the lead up to the 2011 IDA authorization, in 2010- 2011 we will work with three country campaigns to illustrate the impact of conditions in those countries – e.g. privatization. And to focus on removal of that condition in each country. Link with Jubilee South-North working group.*
 - *We will link this work with U.S. based communities that are struggling with WB/IMF style policies and its economic consequences (neo liberal model) (MSIR)–*
 - *We will develop education and action resources including a video on the 3 case studies.*

Outcome 4: Link Debt, Trade and Immigration. By end of 2011, in partnership with trade groups, trade unions and grassroots organizations, we will have developed and established debt-based criteria for assessing trade agreements in order to prevent future indebtedness. We will also have strengthened our analysis on links between debt and migration.

Strategies:

- Analyze debt/trade links – start from the perspective of Jubilee's mission and work on debt and look at the impact of trade agreements on new indebtedness
- Develop four part briefing paper on debt and trade – Center of Concern and Jubilee USA network
- Based on research and evaluation, build consensus in the Jubilee Network for a set of debt-based criteria to evaluate trade agreements.
- Write appropriate targets a letter analyzing the relationship between new debt and trade agreements.

- Develop new analysis on links between debt and migration, and build relationships with links with immigrant rights groups.

Program Exploration:

Greater control over natural resources and domestic revenues. In order to avoid future indebtedness, we will explore emerging efforts by developing countries and civil society to gain greater control over and profit from their own resources (minerals, etc) without damaging the environment.

- ***With significantly increased resources,***
 - ***By 2010 we will have scoped out possible entry points for work on this issue through a study with global partners. Bring report/proposal to NC fall of 2010.***
 - ***We will work with groups like Tax Justice Network, Christian Aid, ICCR, and Revenue Watch during the research phase.***

Sub goal #3: Increased Organizational Capacity.

We will increase Jubilee USA Network's organizational capacity by expanding staff, developing a solid funding base, which are necessary to achieve expanded debt cancellation and our responsible finance agenda

BACKGROUND: We believe that we are at a critical moment where there are real political possibilities both in the South and North to make major changes in debt cancellation and progress towards a more just economic framework. Building on the earlier success of Jubilee 2000 where we were recognized as an effective social change organization, we believe now is the moment to approach several foundations and donors for a funding increase.

In the South Ecuador has just concluded the first official debt audit with 7 to 10 other South countries embarking on citizen debt audits; Norway cancelled unjust debt of five countries and there are five or seven illegitimate debt cases pending between specific European nations and southern countries. The South-North campaign on illegitimate debt has made significant progress in coordination of the campaign. The Jubilee South-North movement is a unique example of genuine South-North partnership in a global campaign for social justice. It is also a critical moment to support civil society in post-HIPC countries such as Zambia, Ghana, Honduras, Nicaragua and Bolivia as they face new challenges.

Jubilee USA, with the progress the Jubilee Act made in 2008, is poised to extend debt cancellation to 24 additional countries, conduct a GAO debt audit and begin work on principled/responsible lending practices in 2009. In order to accomplish this strategic plan and continue as part of the South-North campaign coordination team Jubilee USA needs additional resources.

Outcome 1: Over next 4 years, we will have obtained a total of at least \$400,000 in additional funding over current levels from one or more foundations / donors to "grow" organizational capacity over the next 4-5 years and to increase the number of Jubilee Chapters and Congregations.

Strategies:

- Explore foundation interest in a large capacity building grant

- Prioritize possible foundations/donors to approach based on staff and financial development committee knowledge
- Develop case statement from strategic plan and evaluation of success of 2006-08 accomplishments
- Jubilee board and staff set up meeting in the fall of 2008 to discuss strategic plan and need for capacity building grant
- Ask Financial Development committee, current foundation funders, Network Council members, and other "influentials" to network with potential large foundation/major donors to introduce Jubilee and its accomplishments
 - Invite foundation/major donor partners to Jubilee events such as NC meetings, grassroots conference, international conferences, etc.
 - Ask high profile allies to write testimonials about Jubilee's effectiveness - e.g. ONE, Bread for the World, DATA
 - Host luncheons or social time for board members to interact with foundation/major donor contacts
- By March 2009, Jubilee will have submitted a capacity building grant application to one or more interested foundations.
 - Request expanded staff in areas of financial development, policy research and communications/marketing
 - Identify how Jubilee can raise its visibility in the debt and development community and external audience re: the critical role it plays in linking debt to trade, climate change, oil and food crisis, harmful IFI conditionality, responsible lending and moving IFI's to grants for developing nations.

Outcome 2: By 2012 Jubilee will have increased its research, fundraising, and communications capacity to achieve sub-goals 1 and 2.

Jubilee will have:

- Hired three new staff and moved to a new office space by end 2011
- Expanded its visibility in the mainstream and niche media through a strategic, comprehensive plan
- Added 10 additional grassroots chapters and 100 additional active Jubilee Congregations
- Launched a series of monthly policy update to raise awareness and understanding of global economic justice issues among policy makers
- Completed an external evaluation of organizational effectiveness in achieving sub goals 1 and 2 and published a report based on the findings of this evaluation.