

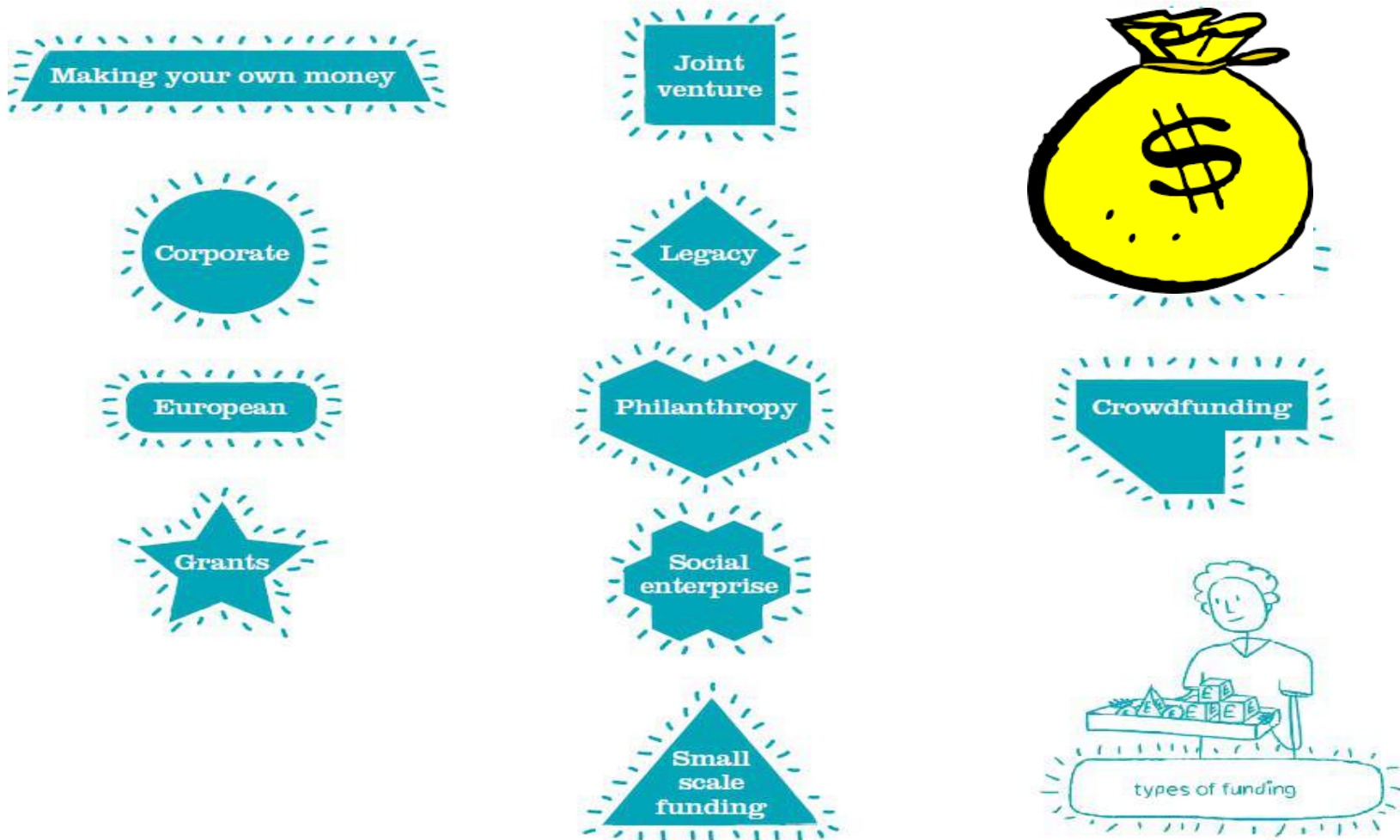
Fundraising Workshop, Greece 2018

Session one:

What funding streams might you explore?

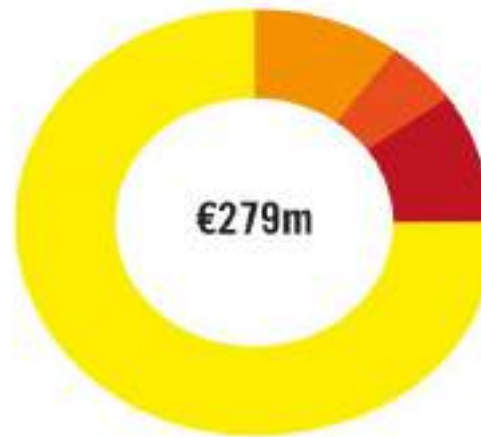
- Individual donors (slides 5 - 7)
- Corporate partners (slides 8 - 9)
- Trusts and Foundations (slides 10 - 12)

2: Which have you explored? How and why?



3: Amnesty International Funding Mix

An example:



- 75% Regular and non-regular donations from individuals
- 10% Legacies and bequests
- 5% Grants from trusts and foundations
- 10% Other income

4: How to decide which stream?

- **Researching funding prospects is time-intensive**
 - Proposals have to really respond to funder preferences

Top tips:

- Who do you know? Ask them who *they* know! An **endorsement** will work wonders in comparison to a “cold” approach
- Look after your **current supporters**! These are the people who might leave legacies, or have networks into philanthropic trusts & foundations
- It is only worth investigating trusts for grants if you have **time and resources**!
- Can you **help companies** to reach people, benefit their local community, or provide staff volunteering?
- Is your project a one-off, easy to understand piece of work? **Crowdfunding or community** fundraising might be for you

5: Individual donors?

- Do these methods suit your work?

DONORS WORLDWIDE PREFER TO GIVE:



For **small donations**, bucket collections or face-to-face „sign-ups” also popular
Major gifts rely on you developing close relationships

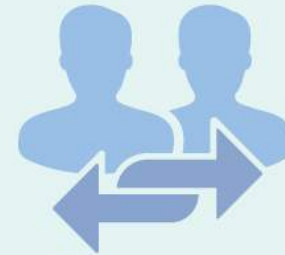


6: Digital campaigns demystified

Both vehicles are simple, popular and growing:



A crowdfunding campaign is when an NPO or NGO uses a website or app to raise a specific amount of money to fund a specific project or program.



A peer-to-peer fundraising campaign is when a person uses a website or app to create their own online fundraising campaign in order to raise money for an NPO or NGO.

7:Pros and Cons: Individual donors

✓ ADVANTAGES

Volunteers are likely to **donate** if they are asked; they are also the most likely to spread the word and encourage others

Donors can become **major donors** – their gifts can change an organisation and they are often very loyal!

Lots of third-party **Crowdfunding** websites: they have wide reach & advice

Long standing causes like SCI attract **legacies**

Events can raise money, awareness, sponsorship and supporter involvement

! THINGS TO CONSIDER

Get people **involved** before asking for support. Cash giving tends to be small but direct marketing for planned giving has a low return-on-investment

Major donors need **attention**, which means your time! Transparency, impact updates, thanking, involving are all vital

Works best if **rewards** are offered. You'll have to pay a **fee** to use a 3rd party site

Establishing trust is vital and people find Wills confusing. It's most effective to create a leaflet / web-page. Can a lawyer help pro-bono?

Can you **reach** your target market? Can someone high-profile come and promote it? Make sure you get hold of people's contact details for future fundraising!

8: Corporate funding?

- **Companies give around their offices and branches**
 - It's about staff involvement and brand alignment, not need!

Split of corporate donations and funding in the UK, 2015:



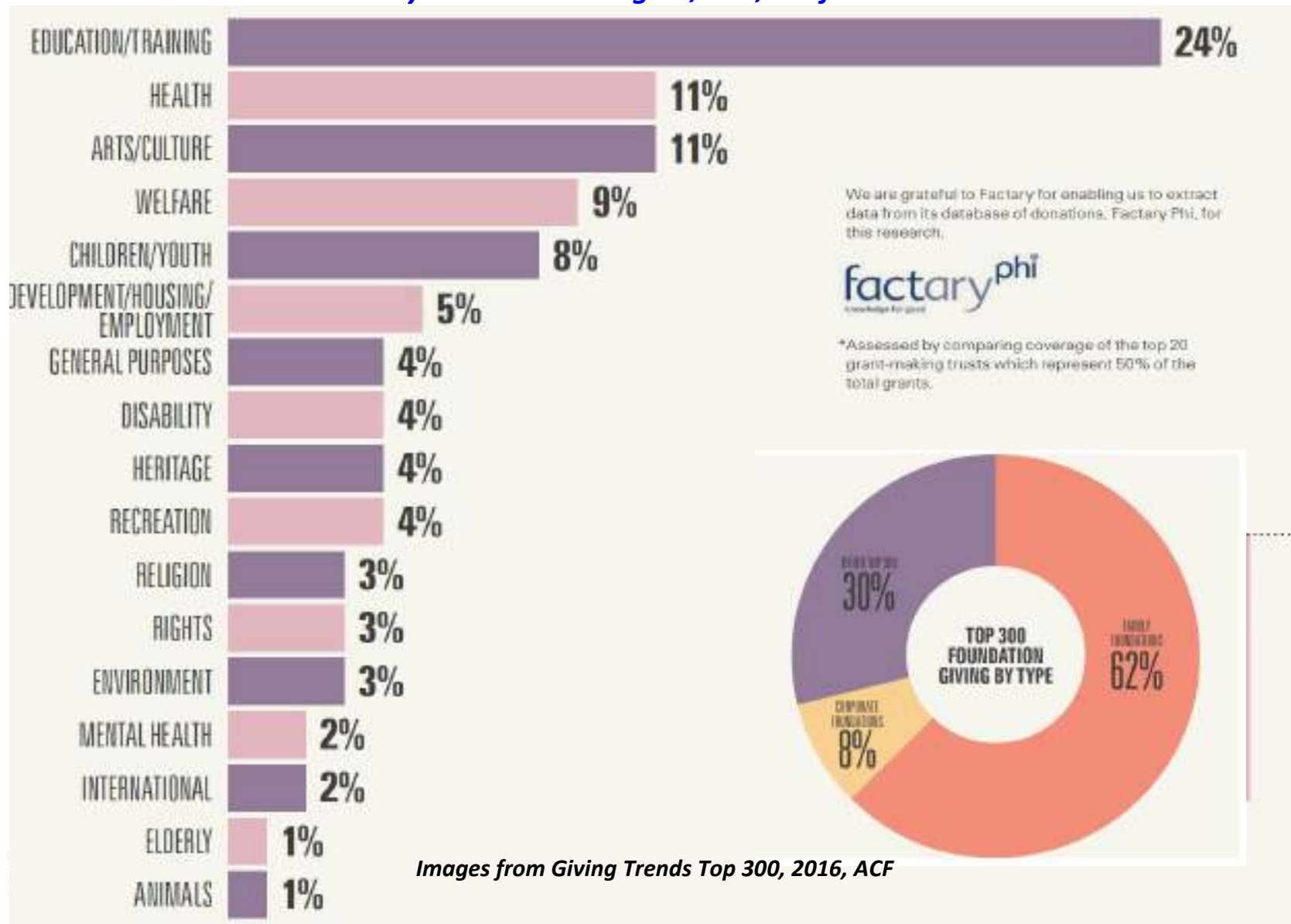
9: Pros and Cons: Corporate funding

✓ ADVANTAGES	! THINGS TO CONSIDER
<p>Keep costs down by loaning equipment or benefitting from professional services <i>in-kind</i></p>	<p>What do you <i>need</i>? Don't take offers that aren't truly helpful as this will drain your time.</p>
<p>Sponsorship or <i>commercial partnerships</i> raise profile. Even a "donation" is really a commercial act for a company</p>	<p>Companies want <i>positive publicity</i> with consumers or local community: can you help reach their target market? Does the association work for you too?</p>
<p><i>Employee involvement</i> – as fundraisers, mentors or volunteers - is a growing trend</p>	<p>Can you offer structured, satisfying, safe <i>opportunities</i>? Corporate volunteers are notoriously busy & unreliable!</p>

10: Trusts & Foundations?

- Mostly funded by an *individual donor* or family business, and may have a living family Trustee
- They are charities with *set charitable objectives*, so usually have clear, prescriptive criteria
- Preferences are diverse but common threads are a focus on *need, impact and innovation*
- Corporate Foundations are a small part of the mix, and usually reliant on company profits, they tend to act like *commercial entities* not philanthropists!

**11: Example of causes UK Trusts make grants to (Association of Charitable Foundations, 2016)
note only 3% towards “rights, law, conflict resolution”**



Images from Giving Trends Top 300, 2016, ACF

12: Pros and Cons: Trusts & Foundations

ADVANTAGES	THINGS TO CONSIDER
<p>Support a wide variety of causes – usually 1-3 year projects</p>	<p>Research, research, research! A tailored application meeting their outcomes will succeed where a generic appeal won't</p>
<p>Often have a specific, published application process and deadlines</p>	<p>Required format: form or proposal? Ensure eligibility and that you have all the attachments (references, policies, budgets?). You will probably wait months for a decision</p>
<p>Clear about what they want to achieve and often clear about how</p>	<p>You will need to align closely with priorities, and if successful report on activities, impact and expenditure</p>

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Session two:

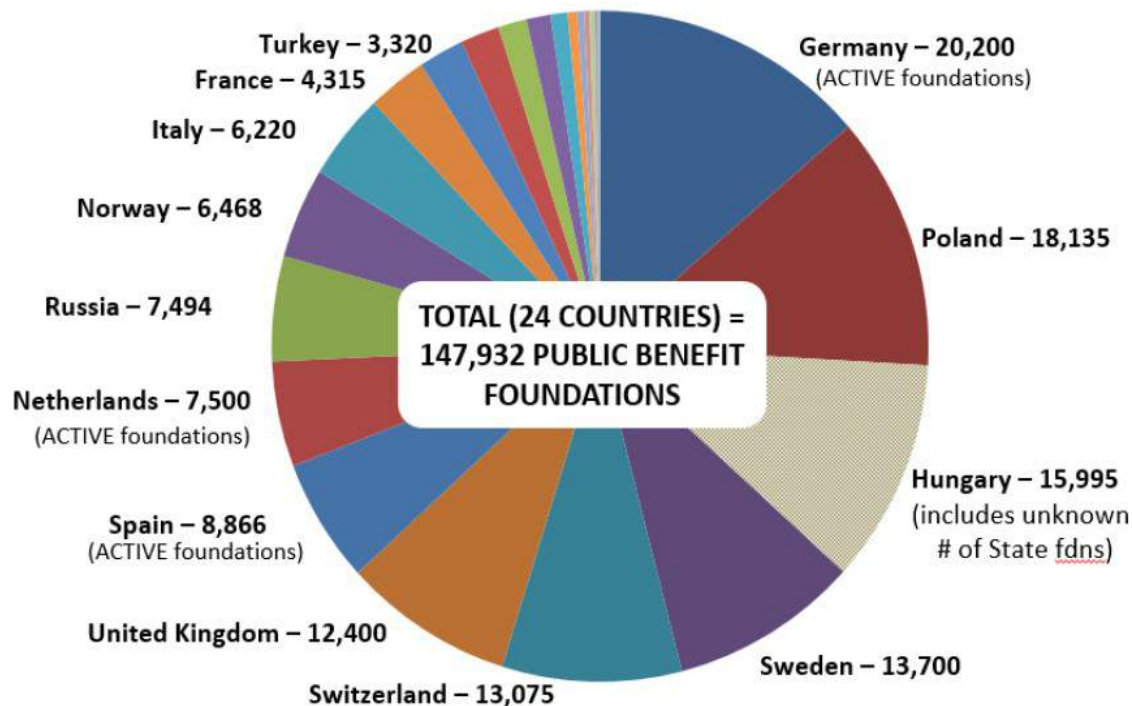
What is the opportunity in your region?

- Trusts based in USA and Europe (slides 14 - 15)
- Trusts that fund internationally (slides 16 - 18)
- Individual Giving in Asia, Africa, Europe, South America, Australasia (slides 19 - 26)

14: Where are all these Trusts & Foundations?

- *Foundation Center reports 86,726 US-registered foundations in 2014, granting over \$60 bn!*
 - *DAPHNE reported the following public benefit foundations in Europe, 2016:*

(Figures may include both ACTIVE and INACTIVE foundations, unless otherwise noted)



OTHER COUNTRIES: Finland (2,830); Czech Republic (2,075); Bulgaria (1,755); Liechtenstein (1,239); Austria (701); Belgium (491); Portugal (401); Slovak Republic (376); Croatia (226); Ukraine (110); Ireland (35)

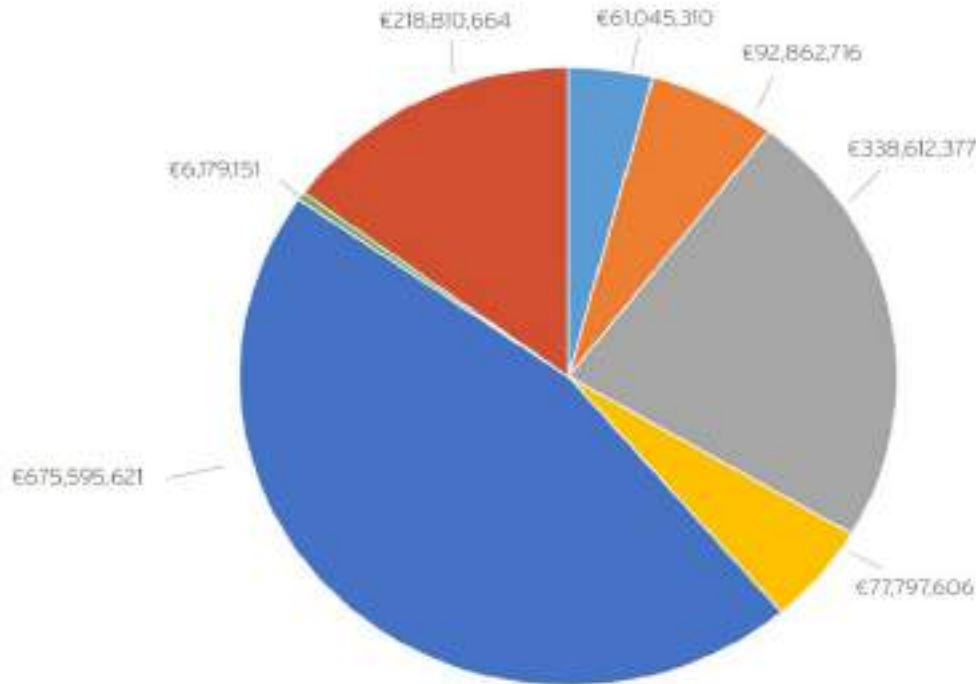
15: How much do European Trusts give?

DAPHNE reported the following (2016):

	<u>Total Expenditures</u>
1. Germany	17.00 billion euro (2012)
2. Italy	9.95 billion euro (2011)
3. Spain	8.07 billion euro (2014)
4. France	7.50 billion euro (2015)
5. Netherlands	6.00 billion euro (2013)
6. United Kingdom	4.40 billion euro* (2015)
7. Switzerland	1.60 billion euro (2015)
Totals (7 countries)	54.52 billion euro

16: Yes, most are based in Europe & USA, but.....

Geographical focus for European and American foundations funding “environmental causes” measured by where the end beneficiary is located:

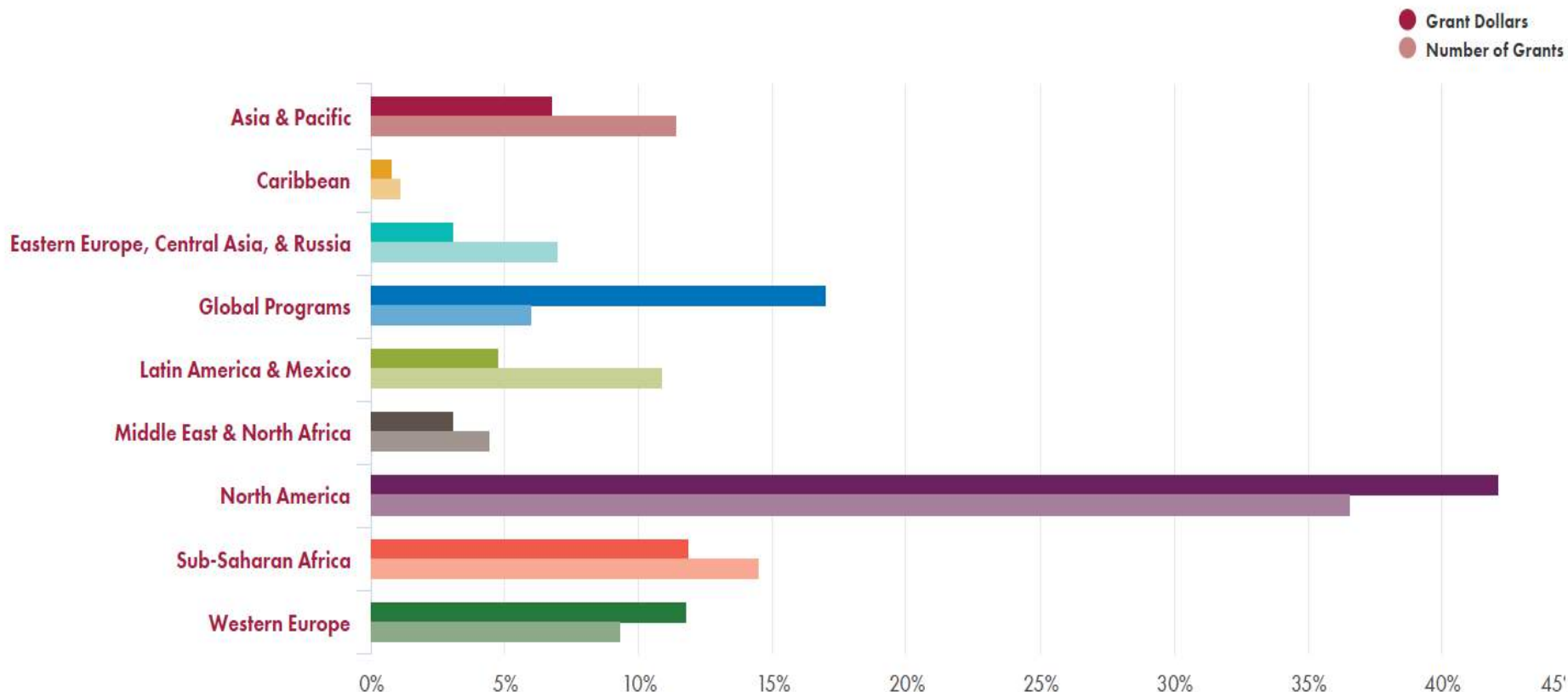


Value of grants in euros for each continent, out of a total of €1,470,903,445

- Africa
- Asia
- Europe
- Oceania
- Latin America
- North America
- International

17: And for Human Rights causes:

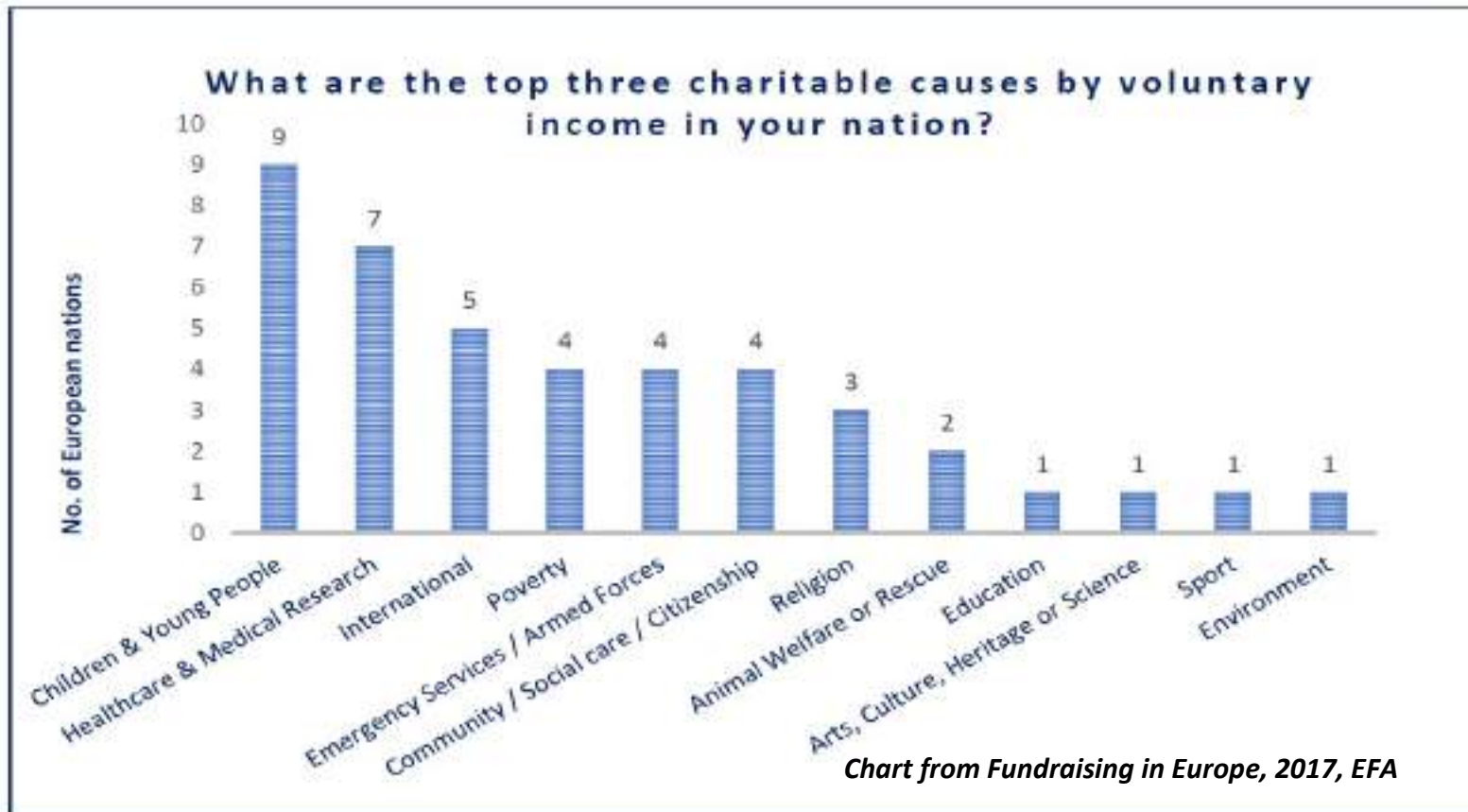
*Geographical focus for Foundations' „Human Rights” grantmaking 2011-2015:
including 22,900 grants from across the world totalling \$2.4 billion in 2015*



18: Individuals also give internationally

„Global Trends” report 2017 found 45% of all donors give abroad – especially younger people to human and civil rights causes

EFA survey of 15 European countries - 5 countries said “international” a top cause in 2014:



19: Individual donors: regional patterns

We know that generosity isn't linked to wealth!

% people donating money, time or helping a stranger in 2012-2016:



20: Trends in individual giving behaviours

Giving declining in wealthier countries, and growing elsewhere thanks to digital technology = opportunity!

CAF World Giving Index, top 20 countries 2012-2016 (see final column for change):

	 CAF World Giving Index 5 year ranking	 CAF World Giving Index 5 year score (%)	 Helping a stranger 5 year average (%)	 Donating money 5 year average (%)	 Volunteering time 5 year average (%)	 CAF World Giving Index 1 year score (%)	 Difference between 1 and 5 year score (%)
Myanmar	1	64	53	90	50	65	1
United States of America	2	61	76	62	44	56	-4
New Zealand	3	59	66	68	43	57	-2
Canada	4	58	66	66	41	54	-3
Australia	5	57	66	68	38	56	-1
Ireland	6	56	61	67	39	53	-3
United Kingdom	7	54	62	71	30	50	-4
Sri Lanka	8	54	58	55	48	n/a	n/a
Netherlands	9	53	55	69	35	51	-2
Indonesia	10	52	42	70	42	60	9
United Arab Emirates	11	51	71	59	23	51	0
Kenya	12	51	71	61	40	60	9
Bhutan	13	50	53	58	40	n/a	n/a
Malta	14	49	46	75	26	48	-1
Norway	15	48	52	59	32	45	-3
Iceland	16	48	48	68	27	46	-2
Malaysia	17	46	52	53	33	n/a	n/a
Austria	18	45	54	52	29	42	-3
Kuwait	19	45	75	43	16	41	-4
Germany	20	45	58	50	27	45	0

Image from World Giving Index, 2017, CAF

21: The larger markets: focus on Europe

Chart from Fundraising in Europe
2017, EFA

Nation	Population that donated in the last month (%)	% point change 2015-2016
United Kingdom	64%	-5
The Netherlands	64%	-2
Ireland	60%	-6
Norway	55%	-12
Sweden	55%	-6
Germany	55%	-3
Switzerland	51%	-2
Austria	48%	-2
Finland	37%	-13
Spain	33%	2
Slovenia	32%	-6
Italy	30%	-2
France	30%	5
Slovakia	30%	7
Czech Republic	18%	-5

22: How do people donate in your region?

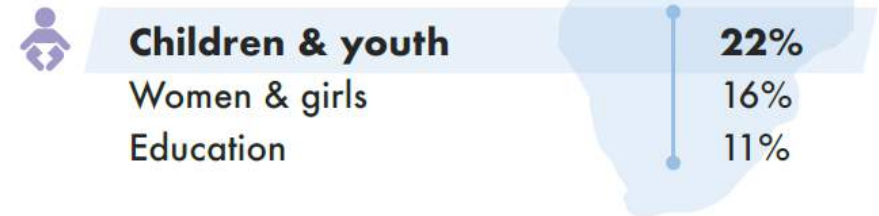
Africa: top donors are in S. Africa, Kenya, Nigeria.

Donors prefer mobile giving and Whatsapp use is high!

AFRICAN DONORS PREFER TO GIVE



TOP 3 CAUSES DONATED TO



DONORS MOST INSPIRED TO GIVE BY



SOCIAL MEDIA THAT MOST INSPIRES GIVING



23: How do people donate in your region?

Asia: often small cash donations as community duty rather than affinity to a cause. Potential for increased online giving should enable more targeted appeals

ASIAN DONORS PREFER TO GIVE



DONORS MOST INSPIRED TO GIVE BY



TOP 3 CAUSES DONATED TO



SOCIAL MEDIA THAT MOST INSPIRES GIVING



24: How do people donate in your region?

Europe: very diverse and many give abroad – growing trend in globalised, online world

EUROPEAN DONORS PREFER TO GIVE



DONORS MOST INSPIRED TO GIVE BY



TOP 3 CAUSES DONATED TO



SOCIAL MEDIA THAT MOST INSPIRES GIVING



25: How do people donate in your region?

South America: there's strong trust in NGOs providing services especially in Brazil, Chile and Argentina

SOUTH AMERICAN DONORS PREFER TO GIVE



DONORS MOST INSPIRED TO GIVE BY



TOP 3 CAUSES DONATED TO



SOCIAL MEDIA THAT MOST INSPIRES GIVING



26: How do people donate in your region?

Australasia: established individual giving in New Zealand & Australia, but Pacific Islands struggle online

AUSTRALASIAN DONORS PREFER TO GIVE



TOP 3 CAUSES DONATED TO



DONORS MOST INSPIRED TO GIVE BY



SOCIAL MEDIA THAT MOST INSPIRES GIVING



Fundraising Workshop, Greece 2018

Session three:

How to find and approach funders and donors?

- Individual donors (slide 28)
- Corporate partners (slides 29 - 30)
- Trusts and Foundations (slides 31 – 32)

28: Approaching individual donors

- **How do you know who to target?**
 - Your existing networks are the place to start!
(and supporters of other organisations in your „space“- investigate online!)

Best practice is to **involve** people in your work before asking for money. Think about your volunteers – they may not be wealthy but who do they know? Identify people that read your publications and media, and attend events that align with your cause: always ask for their contact details so you can ask / ask again! People give because they feel connected: it might take years to convert them but the key is to make existing friends and donors feel special

66% OF DONORS HAVE VOLUNTEERED WITH AN NPO OR NGO WITHIN THE LAST 12 MONTHS.

Volunteers first inspired to get involved by:



97% felt that their volunteer work made a difference.



85% also donated money to the NPO or NGO that they volunteered for.

29: Identifying corporate partners

- **Again, ask your current supporters and networks** who might need prompting to realise they can give you valuable info or a contact where they / their partner / their mum / their friends work!
- **Who can offer you the in-kind support you need:** lawyers, accountants, food & drink companies, travel providers?
- **Look locally:** your local Business Federation should have a list research their “corporate social responsibility” or community activities online & once well-prepared, call the responsible manager for more info
- **Think about who wants to reach your audience:**
there's probably no point in approaching companies that make products for the elderly, if you only work with young people! Remember that companies want to make money and promote their products and brand

30: Found a corporate prospect?

Now find **your USP**: why would they support you and not any other organisation you can think of?

Contact: make a phone call if possible, or write to ask for a meeting: this is where professional partnerships are born!
Tell them about your vision, and why they should be part of it

Research: their community activities so you can be confident in the meeting. Tell them about fundraising, volunteering, press and publicity, skill-sharing they could be part of

The meeting: be professional - take a senior decision-maker with you. Do they expect a professional presentation? Will they all be dressed smartly?

31: Finding Trusts & Foundations

- They exist to give grants and gifts so they are the easiest to research to ensure the “fit” is excellent!
 - Sign up to **e-bulletins** from your local council or public body as well as online groups and fora (eg. GrantAlert and DEVEX Linked:In groups) so you hear about Calls for Proposals, deadlines, new trusts and new funding programmes
 - Find out if your local library has charitable trust **databases** available (they do in US and UK!)
 - Find Trust' info and Grants Managers' contact details **online or via a Linked:In search**
 - Ask colleagues in like-minded national charities what tools they use: many databases are **free**, such as:
 - www.Fundraiso.ch (Swiss Foundations)
 - www.gov.uk/government/organisations/charity-commission (all UK T&Fs)
 - <https://www.gov.uk/government/organisations/charity-commission> (all UK T&Fs)
 - www.guidestar.co.uk (Trusts & Foundations in UK, India, International versions)
 - <https://fconline.foundationcenter.org/> (limited free data on US Foundations)

You'll find a list of more useful bulletins and databases at the end!

32: Found a Trust? How to approach?

✓ TIPS	✗ COMMON MISTAKES
Read Guidelines carefully – make sure you are eligible and your project fits <i>all</i> their criteria. Then: get in touch with them!	Sending a cold proposal without checking first with grant officers could be a waste of time; forgetting to send required enclosures
Find out what they've funded before so you can position your project according to their interests	Not sufficiently tailoring the project description: they probably don't fund "peace" specifically but might have education, youth, skills programmes?
Do you know any " insiders " that can endorse your application?	Not fully researching all your networks that could help gain funder trust
Use their language and mention their priorities in proposals	Using technical language, using internal language
Include a detailed budget showing where all the income will come from	Not asking for a specific amount or showing what it will be used for
Cover: your track record, impact, project aims, duration, beneficiaries, need, activities, outcomes you'll measure	Trying to detail everything the organisation does – stick to the point!

33: Final “takeaway”

- **The three most important things to tell prospective funders about:**
 - What you are changing, not what you are doing
 - How you fit with their interests: not everything else!
 - Who else supports you and how you involve supporters

34: Useful Fundraising Resources

Databases & lists:

GuideStar.org.uk & GuideStarIndia.org: UK and international grant opportunities)

OpenCharities.org (UK) Fundraiso.ch (Switzerland), centre-francais-foundations.org (France),
Stifungen.org (Germany): listings of Foundations with varying detail

hubcymru.org/hub/charitabletrusts.html: UK & Africa grant opportunities

Fundsnetsservices.com: US Foundations including international funders

<https://fconline.foundationcenter.org/> : limited free data on US Foundations

e-bulletins (Linked:In groups):

Devex (Global Development Community)

Development & Fundraising Professionals

GrantAlert

Philanthropy Network

35: Useful Fundraising References

including documents & reports used in this presentation

- *Global Trends in Giving, 2017* (NGO Tech for Good)
- *Look Inside Trusts Fundraising, 2011* (Directory for Social Change & Institute of Fundraising)
- *Fundraising in Europe, 2017* (European Fundraising Association - EFA)
- *Corporate Fundraising : a snapshot of current practice in the UK non-profit sector, 2015* (Institute of Fundraising & Good Values)
- *Environmental Funding by European Foundations, 2016* (European Foundation Centre - EFC)
- *Funding Toolkit* (Canal & River Trust and Inland Waterways Association, UK)
- *The Good Fundraising Guide, 2016* (UK Institute of Fundraising)
- *Crowdfunding Good Causes, 2016* (National Council for Voluntary Organisations & NESTA)
- *Giving Trends report - the top 300 grantmakers, 2016* (Association of Charitable Foundations)
- *Public Benefit Foundations, 2016* (Donors and Foundations Networks in Europe - DAFNE)
- *Advancing Human Rights: The State of Global Grantmaking, 2018* – Foundation Centre, Human Rights Funders Network, Ariadne (European Funders for Social Change & Human Rights), Prospero (International Network of Women's Funds)
- *World Giving Index: A Global View of Giving Trends, 2017* (Charities Aid Foundation)

....And an interesting article: <http://www.globalphilanthropic.com/media/Future-trends-in-global-giving-Mail-Guardian-20140411.pdf>



*Keep an eye on the SCI Members' Area,
which we'll be updating with useful documents*