



# Great British Philanthropy

Growing a fellowship of donors  
to support local communities

Edited by Beth Breeze





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# Forewords



**Caroline Mason**

Chief Executive,  
Esmée Fairbairn Foundation

I am delighted to welcome this report which reflects the achievements of, and shares the learning from, a three-year programme funded by the Esmée Fairbairn Foundation as part of our 50th anniversary celebrations that took place in 2011.

Our funding enabled 35 community foundations to offer enhanced donor education and engagement opportunities, which helped to build a network of philanthropists committed to funding projects in their local community. The programme enabled these donors to become more committed, more vocal, more influential and – crucially – more strategic in their giving.

The goals of the project have been exceeded: it reached over 200 donors who became 'Philanthropy Fellows' and a further 1,500 who learnt more about philanthropy by interacting in some way with the programme. It also helped to unlock over £25 million in new donations that will have a greater impact because the distribution of these funds will be informed by a well-thought-through theory of change.

But we also achieved some unplanned outcomes, most notably a challenge to the stereotypical 'face' of philanthropy in contemporary society. The Philanthropy Fellows profiled in Chapter 5 include young and old, women and men, wealthy and mass affluent, and they come from all corners of England and Scotland. Their stories are inspiring, and their account of the impact that extra support for their giving has made, testifies to the value of The Philanthropy Fellowship.

The trustees of the Esmée Fairbairn Foundation chose to support this programme because they believed that the goal of making engaged philanthropy available to all kinds of donors chimed well with the achievements of our founder, Ian Fairbairn, who pioneered the unit trust industry and made investing accessible to a far wider group of people.

I believe our founder would be proud of the success of this grant to the UK Community Foundations, and would wish all the donors who have been reached by the programme, every success in their ongoing efforts as Great British Philanthropists.



**David Sheepshanks CBE DL**  
Chair,  
UK Community Foundations

This report is an exciting insight into the dynamic and fast-growing world of philanthropy managed locally. It's a world where some very high profile and wealthy people connect with others in the communities that they care about, but as this report explains it is also a world where a much broader cross-section of society can come together to explore how money, people, ideas and networks can be mobilised for the common good and for the good of people who otherwise would have little hope.

Ten years ago the Esmée Fairbairn Foundation invested £1 million in the growth of community foundations through the '*Time for Growth*' programme. The programme resulted in £20 million of new endowed funds, which was an excellent return on the investment in our network, but much more important were the lessons learned from our successes and failures. It is this learning that has underpinned much of the work that UK Community Foundations (UKCF) has done since to support and help accelerate the growth of philanthropy through community foundations, to the point that last year the funds raised/granted (£140 million) were in the order of ten times greater than when '*Time for Growth*' started.

It is a tribute to the foresight of the trustees of the Esmée Fairbairn Foundation that they recognised that without an investment in the capacity of community foundations, increased amounts of giving might not achieve maximum impact in communities nor an appropriate sense of achievement and

excitement for our new philanthropist clients. The Philanthropy Fellowship was a vital investment in our capacity to work strategically with our fund-holders and to help our fund-holders work with each other and learn alongside each other.

I was delighted to see that the report identifies over £25 million of new giving from The Philanthropy Fellowship investment, but just like its predecessor programme that is not the full story. We are on course to raise £1 billion of new giving between 2013 and 2020 and the lessons learned from The Philanthropy Fellowship will be fundamental to ensuring that people who give through community foundations are also helped on their philanthropic journeys.

The challenges that society faces are immense and some of the most profound (for example: adult social care; mental health provision) require communities to mobilise to embrace and address the challenges of isolation and dis-empowerment that are fundamental parts of the problem. The Philanthropy Fellowship has shown us that community foundations can mobilise people to become philanthropists and that we can, working with them and with the community groups that we know, glimpse a future where community philanthropy is a major force for good right across the UK unlocking neglected and underemployed assets in the cause of building a better future.

If you are intrigued by what we are achieving and just how important The Philanthropy Fellowship has been for us, please do contact us.

To get in touch please  
visit [www.ukcommunity  
foundations.org](http://www.ukcommunityfoundations.org)

# Introduction

## Background and goals

This report documents the result of the Esmée Fairbairn Foundation's decision to celebrate their 50th anniversary in 2011 by making a significant investment in UK Community Foundations. The funding enabled community foundations in nine parts of Britain<sup>1</sup> to focus additional time and resources on philanthropy development work. By building a unique network of established and emerging donors, 'The Philanthropy Fellowship' had the twin goals of encouraging a stronger culture of philanthropy, whilst strengthening local communities.

Over 200 people seized the opportunity to become 'Philanthropy Fellows', and a further 1,500 engaged as 'friends', by joining in aspects of the stimulating programme that appealed to them. As a result of this three-year investment, community foundation staff were able to work more closely with their donors to help them become more generous and more effective philanthropists; it is estimated that over £25 million of new funding was subsequently unlocked to benefit local communities across Britain.

Participating community foundations had the flexibility to implement the programme in the way that best suited their area, yet all shared the same three goals:

- To increase the capacity of those who became 'Fellows' and 'friends' by growing their knowledge and skills so that they became more strategic, committed, confident, vocal and influential donors, and better networked with their peers.
- To increase the capacity of the participating community foundations (which included a 'hub' in each region, plus up to six partners), particularly in the amount of time they spent with donors to support their education, engagement and networking.
- To create a stronger network of community foundations across Britain, by increasing the amount of collaboration between community foundations, particularly those working in the same region.

Whilst details of The Philanthropy Fellowship programme varied in each region, its core offering involved education and engagement events, networking opportunities and one-to-one discussions in which people could reflect and revise their philanthropic plans, using tools such as a donor questionnaire<sup>2</sup> and the theory of change.

## What is a 'Theory of Change'?

*A theory of change describes a process of planned social change, from the assumptions that guide its design to the long-term goals it seeks to achieve.*

*Having a theory of change helps donors to draw logical connections between their activities and the outcomes they seek. It helps them to articulate exactly what propositions and assumptions their work is testing – and therefore what they should be assessing in evaluation plans.*

*A theory of change is valuable because it helps donors and their grantees to understand the relationship between the problems that are being addressed and the strategies that are being used to get the work done. A theory of change is helpful for articulating and thoroughly probing the assumptions that lie behind philanthropic interventions. It is also useful for demonstrating progress on the achievement of desired outcomes.*

Adapted from: [www.grantcraft.org/takeaways/what-is-a-theory-of-change](http://www.grantcraft.org/takeaways/what-is-a-theory-of-change)

## Why a 'Philanthropy Fellowship'?

The dictionary defines a 'fellowship' as:

*"A group of people with the same purpose."*

*"A friendly feeling that exists between people who have a shared interest."*

Both definitions reflect the reality of The Philanthropy Fellowship. It brings together people in the same geographic locality who differ in many ways – as the profiles in Chapter 5 clearly show – yet have a shared interest in developing their charitable activity and a shared purpose in improving the quality of life for people living, working or passing through that area. And at any gathering of The Philanthropy Fellowship, there is undoubtedly an excess of 'friendly feeling' – Fellows talk of the relief of meeting 'like-minded people', and how they have forged and strengthened relationships with other donors they might not have met without the impetus of the Fellowship to bring them together.

## A timely investment in community foundations

Community foundations have long been in the business of supporting people to make their philanthropy more enriching and to make their giving more impactful. From 1975, when the first UK Community Foundation was established in Swindon, to 2014, when 48 community foundations across the country support over 15,000 donors with funds collectively worth £426 million, donor advice and support have been core to the network's success and expansion. But working with donors is a time-intensive process and it can be hard to devote resources to long-term philanthropy development when more urgent needs demand attention. The global financial crisis that began in 2007 and the ongoing impact of public sector spending cuts currently being implemented in Britain to rebalance the national accounts, have increased the demand for funding from charitable beneficiaries at the same time as some grant-makers have had to reduce, or close, their programmes. This 'double whammy' makes the contribution of private donors more urgent and important than ever. So it was a timely decision by the Esmée Fairbairn Foundation to invest in the core business of community foundations – that of working closely with donors to develop their philanthropy, both in terms of its quantity and its quality.

## Building on previous success

The Philanthropy Fellowship was initially known as 'Time to Give' because it built on a programme called 'Time for Growth' which was supported a decade earlier by the same funder, and successfully helped ten community foundations to achieve substantial growth in their endowed funds.

The Esmée Fairbairn Foundation's willingness to invest again in community foundations, and to again allow that money to be spent largely on staffing, is testament to their confidence in the remit and importance of the community foundation model, as well as their refreshing willingness to fund core costs.

<sup>1</sup> Please see Appendix 1 for a list of the participating community foundations.

<sup>2</sup> Please see Appendix 2 for an example of a donor questionnaire.



### Time for Growth

*The 'Time for Growth' programme, funded by the Esmée Fairbairn Foundation, ran from 2002 to 2004.*

*It provided ten community foundations with £100,000 of operational support. Relieving the pressure of seeking core costs to support investment for fund development enabled the funded community foundations to concentrate on building endowments and securing long-term sustainability.*

*The £1 million investment was primarily spent on salaries for fund development staff and succeeded in raising £19.5 million in new endowments.*

### The architects of The Philanthropy Fellowship

When this programme was on the drawing board in 2011, the architects could only imagine what a Philanthropy Fellowship might look like, and could only hope that it would prove a useful model. Particular recognition must be paid to two key people who devised and drove the programme:

- Clare Brooks who was then Director of Philanthropy at the Community Foundation Network (later renamed UKCF).
- Dawn Austwick who was then Chief Executive of the Esmée Fairbairn Foundation and is now Chief Executive of the Big Lottery Fund.

The eminent members of the Independent Panel who selected the participating community foundations and provided support and encouragement during the programme, are also deserving of recognition and sincere thanks:

- Annie Boyd
- Stephen Dawson
- Rowena Lewis
- Sharon Shea
- Brian Smouha

### The structure of this report

This report describes and documents the development of The Philanthropy Fellowship from 2012–2014. The following chapters highlight the milestones achieved in each of the three years of the programme, with an emphasis on the key learning that took place within funded community foundations. To make this learning as accessible as possible to others in the community foundation movement, as well as to colleagues working to encourage philanthropy development in the wider charitable sector, it is condensed into practitioner-focused advice. Each of the nine regions within the programme has written one or more contributions in the format of a 'How to', which succinctly capture and share best practice for identifying and working with donors seeking support to become more generous and more effective in their giving.

#### Chapter 1: Laying the foundations of a Fellowship

- How to identify and find philanthropists
- How to use social media to reach philanthropists
- How to get the Board on board with philanthropy development

#### Chapter 2: Building a Fellowship

- How to create a memorable event
- How to run informal events for philanthropists
- How to help philanthropists to open up
- How to make philanthropy fun

#### Chapter 3: Cementing the Fellowship

- How to provide inspiring experiences for your donors
- How to get a long way from the office
- How to work with philanthropists to explore and choose options

#### Chapter 4: Sustaining a Fellowship

- How to appeal to younger professionals
- How to work with professional advisers
- How to set up and support a giving circle

#### Chapter 5: Meet the Fellows

The report culminates with an inspiring set of profiles of 20 of the women, men and couples who have become Philanthropy Fellows and are willing to reflect on their motivation, share their experience of the programme and outline plans for their ongoing philanthropic journey.

## Thanking, sharing and celebrating

This report has been produced for three important reasons.

Firstly, to publicly recognise the Esmée Fairbairn Foundation's generous financial investment and ongoing faith in the role and importance of UK Community Foundations.

Secondly, as an opportunity to share key learning so that others within the network and beyond can benefit and enhance their efforts to encourage more, and more effective, philanthropy in Britain.

Thirdly, to share the Fellows' stories which illustrate the changing face of philanthropy in Britain and will hopefully inspire others to use some of their private resources to enhance the communities in which they live, in a mutually enriching experience of philanthropy and fellowship.





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## Chapter 1

# Laying the foundations of a Fellowship



# 1

# Laying the foundations of a Fellowship

## OVERVIEW

### Establishing the baseline

Before The Philanthropy Fellowship programme began in 2012, research was undertaken to establish the starting point from which any progress could be measured. In Autumn 2011, 35 community foundations provided information regarding the time and resources that had been available to work with existing and potential donors in the preceding 12 months.

This baseline study showed a wide variety in the capacity of community foundations across the network to provide donor support, education and networking. Despite the year-on-year success of community foundations across the country, demonstrated by steady growth in the number of funds and the increasing collective value of funds, as shown in graphs 1 and 2, insufficient human and financial resources were found to be affecting the ability of a large part of the network to offer comprehensive donor care. In particular, as charts A, B and C show, the baseline research highlighted that:

- The majority (55%) of respondents felt they lacked enough time and resources to work with more than half of their donors.
- Less than a quarter (22%) of respondents were able to take most of their donors on site visits to learn about the needs in their local community.
- Just over a third (36%) of respondents were unable to ensure that most of their donors had the chance to network with fellow donors.

The nine community foundations selected to host The Philanthropy Fellowship programme were chosen, in part, because they were already offering higher levels of donor support, education and networking. However, their efforts were still detrimentally affected by a lack of resources, for example a majority (55%) of these nine foundations reported lacking the capacity to offer site visits to educate most of their donors about local community needs.

The structure of the programme meant that many more community foundations were involved beyond the nine host or lead organisations – a total of 35 community foundations received some funding and participated in various ways. This larger group was slightly more likely to include community foundations that reported lacking the capacity to offer significant donor support in the year before the programme began:

- Two of this wider group lacked the time and resources to do one-to-one work with any of their donors.
- Four reported being able to take 'few or none' of their donors on site visits.
- Four were unable to offer any donor networking events.

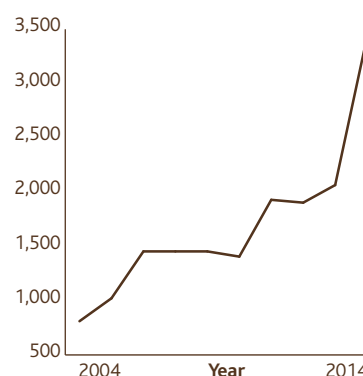
Data was also collected from 13 community foundations that either did not apply or were not successful in becoming part of the Fellowship programme. This information enabled a point of comparison as the programme progressed, although clearly other factors beyond this funding may have affected developments in both the funded and the comparison group.

At the baseline point, the comparison group was found to be slightly less likely to be offering comprehensive donor care, which reflects both the funder's and the independent panel's decision to prioritise the selection of community foundations that were already demonstrating expertise in this area:

- 70% of the comparison group lacked the time and resources to work with most of their donors, compared to 55% overall, and 48% in the 'funded' group.
- Almost half (43%) of the comparison group offered site visits to 'few or none' of their donors, compared to 27% overall and 17% in the 'funded' group.
- Almost half (46%) of the comparison group were unable to offer donor-only networking events to most of their donors, compared to roughly a third (36%) overall and 31% in the 'funded' group.

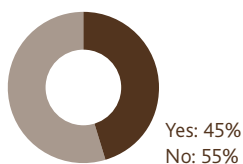
This baseline research proved useful in underlining the existence and extent of the issues that the programme sought to address, and confirming the need to help community foundations cover the core costs involved in delivering comprehensive donor support, education and engagement opportunities. The research also provided a set of metrics to enable the evaluation of progress over the lifetime of the programme.

**Graph 1**  
Growth in the number of community foundation funds 2004–2014



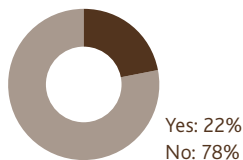
**Chart A**

In the past year, did you have enough time and resources to work with more than half of your donors on their giving?



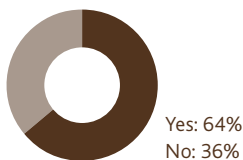
**Chart B**

In the past year, were you able to take more than half of your donors on site visits to learn about the needs in the local community?



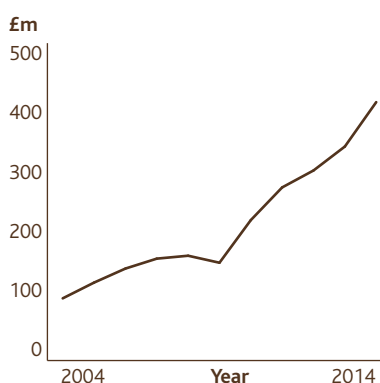
**Chart C**

In the past year, did more than half of your donors have the opportunity to network at donor-only events?



**Graph 2**

**Growth in the collective value of funds managed by community foundations in the UK 2004–2014**



### The view from within the lead community foundations

In addition to the quantitative data described above, telephone interviews were conducted with a lead person in each of the nine community foundations hosting the programme in January 2012, the month the programme began. The aim of this aspect of the baseline research was to record the reaction of the staff team and trustees in each 'hub' to becoming part of the programme, to summarise initial priorities and plans and to air any concerns about the challenges that lay ahead.

The findings were grouped under five headings, reflecting the dominant themes that emerged in the interviews, as follows:

#### Extension and Enhancement

There was widespread recognition that the goals of The Philanthropy Fellowship were closely aligned with pre-existing aims, as this quote shows:

*"Developing donors is our day job, so this programme is like core cost funding because it allows us to spend more time with the donors and to leverage the success of what we're already doing well in the community foundations involved in our bid."*

The new funding was widely viewed as an opportunity to build on and develop work in this area, as illustrated by the following quotes:

*"It's about being focused and able to put the energy into the donor learning and donor development in terms of their thinking and reflection. We've never had the chance to do that before."*

*"We spend a lot of time with just a few of our donors, now [we have this funding] we want to interact with a broader range of donors."*

*"We've never had the resources to put the knowledge we've already gathered about [our area] and its needs into a package that we can use to go out and get donors, and then work with them."*

*"We now have the funding and the requirement to work strategically to develop philanthropy across the region. It's enabling us to do the things we've always wanted to do."*

#### Excitement, Enthusiasm and Enjoyment

The second dominant theme was the excitement generated by being part of the programme and enthusiasm at the prospect of engaging in this work for the three years ahead. One chief executive said:

*"This is a golden opportunity."*

A sentiment echoed by another interviewee who described being part of the Fellowship as:

*"Exciting – we can now 'up our game' in working with donors. It's also a recognition of our existing expertise and status."*

There was a broad sense that the new funding would enable community foundation staff to focus on the deeper processes of giving, rather than merely the transactional processes involved in administering funds. It was felt this would make philanthropy more enjoyable for donors, as this quote illustrates:

*"[Now we can] help their philanthropy take on more shape and make their giving more impactful and more enjoyable."*

### Excellence

A number of interviewees used the language of 'excellence' to express their feeling that the funding recognised the quality of services already offered to donors, as well as high hopes for how the new funding would positively impact upon their work in the coming three years. For example, as two different interviewees explain:

*"When we tell people that we've been selected as one of the philanthropy hubs, it is reassuring and reconfirms our position as being at the heart of philanthropy."*

*"It is recognition that we know what we're talking about and know how to advise philanthropists on ways of being strategic in their giving. [The funding indicates] someone feeling confident that we can take it to the next level."*

The idea of excellence was also used to refer to both the quality of the support that could be offered to donors in their area in the future and to the higher standards they could now strive for as an organisation, as these quotes illustrate:

*"We want to take ourselves up to the next level."*

*"Our offer can now be bigger and broader."*

*"This will underpin our role as the leading philanthropy organisation in [our region]."*

### Effective Giving

The community foundations involved in The Philanthropy Fellowship understood that the purpose of the programme was to promote more effective and impactful giving, rather than simply a larger flow of funds. Supporting donors in their efforts to identify the non-monetary resources they have to offer in order to enhance their gifts and make their philanthropic spending go further, was a widespread aim, as this quote illustrates:

*"We're interested in creative, learning opportunities, and in thinking about how people are using other resources alongside money to help them give more effectively."*

### Engagement

Finally, there was a widespread view that the funding would create space and time to engage more deeply with the wider community foundation movement, which would simultaneously enable strengthening of both their own organisations and those they engaged with. Indeed, it was felt by some that this process had already begun during the bidding period:

*"The process of writing the bid itself has already led to positive outcomes, in terms of focusing our staff team and giving us the opportunity to collaborate with nearby community foundations."*

Engaging with other community foundations, particularly neighbouring foundations who were partners in the same region, was seen as a way of helping all to raise their standards to a higher level:

*"[Now we can] harness the strength of the more established community foundations to strengthen the whole network."*

In addition to better engagement with colleagues in the community foundation movement, stronger and better engagement with current and potential donors was a common theme running through all the interviews, as expressed in this quote:

*"We feel the Esmée Fairbairn grant will enable us to work at a more engaged level with our existing donors who want to understand more fully the particular needs in our area, and to engage more fully with other donors, rather than just seeing them at drinks and canapé events."*

The host community foundations also spoke about the programme being a good fit with the demand they are experiencing from their donors, who are ready and waiting for greater support. As one chief executive said:

*"Our donors are asking for that next stage of engagement, for example they are asking 'how many homeless people are there in our area?' We now have the time and funding behind us to be able to do that work with our donors."*

### Conclusion of baseline research

The baseline research paints a useful picture of the starting point before the programme began, and highlights variations in the pre-existing capacity, experience and expertise in providing support to philanthropists. It also shows that participating community foundations were ready and eager to make use of the investment to improve both the reach and the quality of their work with donors.

### Sharing the learning

The rest of this section contains three contributions from participating community foundations, sharing their learning in laying the foundations for the Fellowship in their area, covering the following topics:

- How to identify and find philanthropists
- How to use social media to reach philanthropists
- How to get the Board on board with philanthropy development



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# HOW TO...

## Identify and find philanthropists

**Sally-Anne Greenfield**

Chief Executive, Leeds  
Community Foundation

Contributed by

**The Philanthropy  
Fellowship Yorkshire**

### Why might it be tricky to identify philanthropists?

A philanthropist is someone whose actions demonstrate love and concern for their fellow human beings; the term comes from two Greek words – Philos (to love) and Anthrope (humans). Today, the term is used to refer to people who give their money, time, talents, knowledge, contacts and any other asset they possess to support charitable causes. As philanthropists are defined by how they behave, rather than something more easily identifiable such as where they live, it can be difficult to know how to find them.

### What's the best way to identify philanthropists who give money?

The easiest identifying factor is that they have previously given a donation to a charitable cause. You can find people who are existing donors to other causes in a number of ways:

- Read the local newspapers and business-focused publications, which often carry reports of significant donations.
- Many of the largest donations go to universities, arts organisations and health charities, so keep a particularly close eye on the names of their donors, which may be listed in their annual reports or on donor boards in their buildings.
- Some donors organise their giving through their own charitable trust or foundation, so subscribing to a trust alert service (such as [www.new-grant-maker-alert.co.uk](http://www.new-grant-maker-alert.co.uk)) will help you find out more about new private grant-making initiatives.
- Subscribe to websites that offer information and advice about philanthropy and take note of who they are talking about.
- All the world's major religions advocate charitable giving, so look out for leading figures in faith communities, especially those that ascribe to a model of pledging a percentage of income, such as the Christian model of tithing or the Muslim model of zakat.
- Annual publications such as the *Sunday Times Giving List* (published every April within the paper's Rich List) and the Coutts *Million Pound Donor Report* (published every November) will spotlight names that may be worth following up.
- Create and develop links with professional advisers, particularly those who deal with private clients, who may welcome learning about causes of interest to their clients.

### What's the best way to find philanthropists who give their time and talents?

Philanthropy is not just about money, yet too many 'philanthropy seekers' get fixated on trying to identify the wealthiest people in a community and forget that donors usually have both financial resources and an affinity to the cause. It is therefore worth finding out what inspires people to get involved in the local community in different ways: Who are the people who give time and share their talents? It is often these people who are aware of a specific need and want to be part of providing a potential solution. Signing a petition or writing a letter to the editor of a newspaper can sometimes be the first step in a philanthropic journey that could result in a significant financial gift, perhaps via a legacy. These future donors are likely to be people who have:

- Set up a project or community initiative to tackle a particular cause.
- Shown keen support for a local campaign that has an impact on the local community and spoken out about local needs and issues.
- Established a corporate social responsibility (CSR) committee in a company or run a charity event in their workplace in the community.
- Encouraged employee-based initiatives in a company of which they are a board director.
- Served on the board or management committee of a charity or community group.
- Held a senior occupation in a care giving environment such as health or social care.
- Been a serial volunteer, offering help to numerous organisations over time.

### **After identifying names, what's the best way to approach them?**

Do not make the common mistake of thinking that sending a letter to someone with whom you've had no previous contact, however well-crafted, will do the trick! You need to do three things:

#### **Put yourself in a position where philanthropists, or their intermediaries, might find you**

Get a listing in charity directories used by professionals such as will writers, or participate in awareness-raising campaigns such as Wills month.

Write articles for professional adviser external publications and/or offer to speak at their client-facing events.

Go to networking events that you think local philanthropists and entrepreneurs might attend.

Ensure your PR and communications plan includes opportunities for highlighting your supporters and don't forget the power of social media!

Have a professional website, that is regularly updated, and make use of schemes such as Google grants to assist your organisation in gaining free support to promote your website and improve your search engine optimisation.

#### **Ensure your approach is personal yet professional**

Where possible get an introduction from a peer or personal contact, or a written testimonial of some sort, so that your relationship begins on a trusted foundation.

It is important to have done research before approaching potential donors, but it is even more important to use the results of that research wisely. Don't launch into conversation with a long list of things you know about them, or send letters saying "We know you are interested in X", as that can make the recipient feel they have been stalked. Be more subtle, and weave things carefully into your conversation or your written approach. For example, if you know they were brought up in a particular area, talk about a local project. If you have heard they are interested in young people and employment, use that as an example.

Continue being subtle as your relationship develops. Send photocopies or online links to articles you think might interest them, or offer to introduce them to someone they have mentioned to you.

Follow the maxim that you have two ears and one mouth and use them in that proportion! Spend more time asking questions and actively listening to their answers to find out about their interests, passions and concerns. Talk with, not at or to, potential donors.

If you don't know the answer to a question, always be honest and say that you don't know. Bluffers get caught out!

#### **Let yourself be ready to accept the unexpected**

You can do all the planning and all the research in the world, yet still find philanthropists in all sorts of unexpected places. People living in back-to-back terraces in a relatively poor part of your town may still have an asset worth £60,000 that they wish to leave in a charitable legacy. The rather crumpled looking cheque for £10 sent in response to your Christmas appeal but written on a Coutts cheque means they are worth a lot more than you might think!



### **In a nutshell...**

Take what seems the longer route to your goal by asking people for their opinion rather than their pin number: if you ask for money, you often get advice but, sometimes, when you ask for advice you get money.

Be visionary – have big, hairy, audacious goals and talk about them a lot, whenever you can. This will inspire people, and you never really know when a philanthropist is right in front of you ready to be inspired.

# HOW TO...

## Use social media to reach philanthropists

**Kirsty McKinnon**

Communications Officer, Leeds Community Foundation

Contributed by

**The Philanthropy Fellowship Yorkshire**

### Why use social media to reach philanthropists?

Social media has made the world an even smaller place, allowing us to instantly connect with individuals and gain an insight into their lives, minds and interests. If used in the right way social media can be an extremely powerful tool to connect you with the people you want to meet. Social media is also a useful tool for helping promote your messages.

### What are three simple first steps that anyone can take?

- Follow key contacts through Twitter and Facebook to find out people's inspirations and passions and use this to send messages that will resonate with them.
- LinkedIn – the business networking channel – is often used by people who are not on any other social networking sites. People often list their interests on this site, which can enable you to identify their charitable concerns. LinkedIn is also a good way of finding a direct route in to someone you want to meet, by finding out who, in your network, they are connected to so you can ask for an introduction.
- Set up Google alerts to keep you updated with what philanthropists you want to talk to are doing in your area. Google alerts is a content change detection and notification service, offered by the search engine company Google. The service sends emails to the user when it finds new results – such as web pages, newspaper articles, or blogs – that match the user's search term.

### What else helps ensure a successful use of social media?

- Be consistent in your social media messages and keep your outputs to an acceptable level – too many messages will be viewed as 'spam' and could put people off.
- Unlike many forms of marketing, social media involves two-way communication, so be sure to interact with your followers, not just talk at them! For example, you can retweet their output on Twitter and share messages they post on Facebook.
- Don't be text heavy on social media communications. A photo can tell a story better than words, so use carefully chosen imagery as an effective way to spread your message.

### What are the more advanced ways of using social media to reach philanthropists?

- YouTube, Flickr, Pinterest and Picasso can provide a useful resource to upload short videos and pictures telling the stories of some of the projects you support or streaming clips of events you have run.
- Be creative and personal – the use of video sharing means you can target philanthropists in creative ways and personalise your message to ensure you are noticed.
- Set up a blog if you can commit the time to update it on a regular basis. More people are now using and reading blogs, and they have an advantage over other forms of social media in that they give you more space to talk about your work.



### In a nutshell...

Social media enables free, targeted and personalised communications, it is a powerful tool and worth getting to grips with.

This form of communication is uniquely interactive. Don't use it just to talk at people, but rather make time to engage in an ongoing dialogue with your various audiences.

## HOW TO...

# Get the Board on board with philanthropy development

**Carol Lynch**

Chief Executive, Kent  
Community Foundation

Contributed by

**The Philanthropy  
Fellowship South East**

### Why is it important to get the Board on board with philanthropy development?

Community foundations specialise in developing high-value relationships with a smaller number of donors, rather than trying to secure smaller donations from a large number of people. This kind of philanthropy development is completely dependent on high-level networking, building credibility and developing relationships. People make major gifts to people and organisations that they know and trust. The job of creating and developing trusting relationships with potential donors cannot be left to one or two people and it is not the sole responsibility of the Fund Development team who have probably been recruited for their skills and experience rather than their high-value contacts. Getting the Board 'on board' is therefore essential to raise significant funds.

To meet ambitious targets for growth, every Board member needs to be proactively involved in identifying, cultivating, soliciting and stewarding major donor relationships. Board members usually have great local knowledge and expertise. They are highly respected individuals with impressive local networks and connections – that is why they are on the Board in the first place. They are also deeply committed to the cause and give their time freely without pay. In fact, they are usually our hardest-working volunteers. Board members are our best advocates and therefore our most important resource in developing high-value relationships.

### What are the first steps?

#### **Make fund development the no. 1 strategic priority**

The core purpose of community foundations is to strengthen local communities and tackle issues of genuine need. This is our *raison d'être* and needs to be enshrined in everything we do. However, this charitable purpose cannot be achieved without encouraging and facilitating local giving. There can often be tension between prioritising Fund Development activity and addressing community need, which includes questions about how to prioritise the limited energy, effort and time of Board members. The reality is that spending money is something we all find easier to do (and talk about) than raising money, but we cannot do the latter without first achieving the former!

#### **Put Fund Development in every Board member's job description**

As Fund Development is an important part of the job for every Board member, make it explicit in their 'job description'. It is unlikely that all members of a diverse Board will have networks of wealthy friends and contacts. That is as it should be – it is important that the Board represents a wide range of interests, skills and experience. However, that doesn't preclude Board members from having an active role in encouraging philanthropy. They may have other useful contacts, e.g. with local councils, other funders, government departments or professional advisers. Or they may have close links with the community and/or local charities and can help nurture existing and prospective donors and

bring them closer to community need. The important thing is that every trustee believes that Fund Development is a fundamental part of their role on the Board.

#### **Remember it is a team game!**

Securing major gifts is not a solitary activity – it is only successful through collective effort. Establishing a genuine joint enterprise might require as much of a culture shift for the staff as it does for the Board.

For instance, if Board members are expected to invite guests to a donor cultivation event, be clear that it can only go ahead with their wholehearted buy-in. Don't make the mistake of putting on an event only to find that the Board is not comfortable sending personal invitations to their friends and contacts. Ask trustees to join in tasks such as visiting the venue and food tastings so that they feel ownership of the event. Encourage Board members to speak up if they have concerns (preferably before it is too late to change details!) and listen carefully to them. It may take more time, but it will pay dividends in the end in terms of reaching the right people.

Everyone has different strengths and preferences. Take the time to get to know your Board members and where they can best make a contribution. Not everyone is comfortable with directly asking for donations, but most people are happy to invite friends to events organised by charities they feel passionate about. Visiting prospective donors alongside the Board member works very well, where they can make the introduction and then take a back seat when it comes to the detail.

### How can Board members become even more involved?

Board members cannot become fully engaged in philanthropy development unless they are properly equipped. Develop and share briefing notes on individual prospects, key facts about your charity, and a compelling case for support. Make sure everyone is properly briefed before any sort of donor-facing event or activity: this briefing should include information on who is attending, their giving history, their interests, the goals for the event and a clear assignment of roles. A thorough debriefing held promptly after the event is essential to capture new intelligence and agree follow-up actions.

Remember: if you are not keeping score, it is just practice! Establish systems to monitor Fund Development activities and track progress. Create accountability by working individually with each Board member to develop and agree a plan of individual actions and review it regularly.

Board engagement with Fund Development works best with a balance of group interaction and individual one-to-ones. Group working is creative, fosters camaraderie, fun and healthy competition, with the Board feeding off one another. While one-to-ones are important for Board members to discuss sensitive information discreetly and to avoid 'list-fatigue' at Board meetings.



### **What helps grow the Board's confidence and effectiveness?**

Board members will share their contacts more willingly if they feel confident that these relationships will be treated with discretion and sensitivity. It is about mutual trust. If a Board member feels the time is not right to approach a particular contact, then Fund Development need to respect that and back off!

When communicating directly with a Board member's contact, make sure the Board member is kept informed every step of the way. After every meeting or exchange, drop them an email or make a quick call to let them know how it went. It can damage trust if a Board member happens upon their contact and is embarrassed not to be up to date with how the relationship is developing.

The overwhelming feedback from fundraising experts is that Boards are far more effective in persuading other people to give if they themselves give. This does not mean that every Board member needs to be a fund-holder or significant donor. It is about Board members donating at an appropriate level according to their means – that could be £100 or £100,000. It is conceivable that Board members may be asked by prospective donors whether they donate themselves, and it is important that they are able to answer 'yes'. Here in the UK, we haven't yet got to the point of being forward enough to ask how much!

### **How do you make sure the Board contains people willing to get involved?**

Don't be embarrassed about seeking out well-connected individuals as Board members, but do check they are willing to engage in Fund Development by making it part of the initial conversation with every prospective Board member. It is much better to be up-front from the outset rather than recruit an unwitting Board member who feels hoodwinked after they join. Accept that not everyone will feel comfortable with a fundraising role. If a prospective Board member really does not want to engage in Fund Development, you might consider offering them a non-board advisory role instead. However tempting, think very carefully before creating a two-tier Board – those who are willing to take on a Fund Development role and those who are not. Also, allow existing Board members to bow out gracefully if they feel this new way of working is not what they signed up for.

Once you have the right Board in place, keep them enthused about philanthropy development work by making it fun! Success breeds success, so start every Board meeting with Fund Development successes. Make sure Board members are given full credit for the role they play. If you finally secure a major donation after months of painstaking cultivation, make sure that any contribution made by Board members is applauded loudly because, as the saying goes, there is no limit to the good you can do if you don't care who gets the credit.



### **In a nutshell...**

Invest time in nurturing the Board's passion for and understanding of your organisation. People are most able to persuade other people to give to a cause when their own enthusiasm shines through.

Make sure every Board member has the opportunity to visit projects, has a bank of ready stories to share and is regularly updated on successes and achievements. It is too easy to get bogged down in fundraising targets, action plans, prospect pipelines and lose sight of why we are all here.

Make the time to keep all your Board members in touch with how your organisation is changing the face of the local community, then they will be your most trusted partners in developing philanthropy.



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## Chapter 2

# Building a Fellowship



# 2

## Building a Fellowship

### OVERVIEW

During 2012, the foundations of the programme were laid in the nine participating regions, and a nascent fellowship began to take shape.

The key milestone in most areas was a launch event, which served both to explain the thinking behind the Fellowship and to invite existing and potential donors to get involved. These events were held in many prestigious locations including Downing College Cambridge, Preston County Hall, the Scottish National Portrait Gallery and Abbott Hall Art Gallery in Cumbria. Such venues proved attractive to potential fellows and friends, and demonstrated the strong local connections enjoyed by community foundations.

Describing the benefits of such events, the Scottish region explained:

*"It allows donors, prospects and stakeholders the opportunity to meet and engage with staff and trustees of the Foundation. The debate allows them to ask questions of prominent philanthropists and hear stories about philanthropy and to network with like-minded individuals and learn about what others are tackling through their giving."*

In a similar vein, the South West fellowship explained their focus on events at the start of the programme because:

*"It isn't until [donors] experience the benefits of networking with their peers that they fully appreciate the benefits of the Fellowship."*

More informal and intimate events were also held in the first 12 months, including a 'Philanthropy Lunch and Learn' session and an alternative tour of Mayfair for donors, whose guide was a former homeless man, both organised by the London Philanthropy Fellowship. In the South East region, a programme of four workshops included presentations on the theory of change and academic research into philanthropy, as well as visits to innovative projects such as the Clink restaurant within Highdown prison in Surrey.

Two distinct approaches to organising the programme had emerged by the end of year one:

- A 'set menu' of activity designed for a defined cohort of fellows (as seen in the South East and London regions).
- An 'à la carte' approach offering a range of activities to an undefined body of fellows who could opt in and out as they pleased (as seen in the North East, North West, East and South West regions).

Both approaches can work well, but demonstrate that it is best to make a conscious decision about the overall 'look' and structure of the programme, not least so there is clarity for partners and participants in what to expect as the programme unfolds.

However, events were only one part – albeit often the most visible element – of the overall programme. In many cases they were the 'gateway' to encourage potential donors to

make initial contact before moving on to more substantial work that happens in private. Most often these are described as 'one-to-one' sessions, in which community foundation staff use a variety of techniques to help donors reflect on their philanthropic goals and decide how best to achieve them. During the first year of the programme, 129 one-to-one sessions were held with donors. One region described the highlight of this work as:

*"Getting to know our fellows in more depth, and being able to tailor our philanthropy advice and charity recommendations accordingly. In addition, because we consciously spent more time with the fellows on a one-to-one basis, staff members gained more practice and felt more confident working in this way, and this benefited other donors with whom we were working."*

### Progress by the end of year one

By the end of the first year the programme was on track to reach its goals:

- 86 fellows had been identified.
- 553 friends, defined as other donors engaging with, or in some way benefiting from, the programme, had been identified.
- £4,791,716 of additional money had been unlocked.

In addition, the comparison of progress in the funded community foundations with both the baseline and the control group data, indicated that the funding was making a discernible difference.

Across all respondents, half (50%) reported being able to do one-to-one work with most (more than half) of their donors, up from 45% in the previous year.

More respondents reported being able to offer site visits than in the previous year. A third (33%) of the areas participating in the programme were able to offer site visits to most of their donors, compared to one in five (22%) before the programme began.

The starkest difference arose in relation to the ability to organise donor networking events: 66% of areas participating in the programme reported being able to ensure that all or most of their donors could network with other donors, compared to just 33% in the non-funded areas.

### Sharing the learning

The rest of this section shares learning from around the country on how to build a fellowship:

- How to create a memorable event
- How to run informal events for philanthropists
- How to help philanthropists to open up
- How to make philanthropy fun



# How to...

## Create a memorable event

**Danielle Porteous**

Director of Development,  
MK Community Foundation

Contributed by

**The Philanthropy  
Fellowship Thames  
Valley**

### What is a memorable event?

Events are an excellent way to engage with a larger audience, attract new supporters and create a sense of belonging for donors. But how do you create an event that sets you apart, achieves your objectives and doesn't break your budget?

### Have clear objectives for your event

Before embarking, it's important to be 100% clear on why you are hosting the event and how you will measure success. Understanding what you hope to achieve will help to focus your decisions on everything from venue, to the programme, to the guest list. Be as specific as possible in your objectives, for example instead of a general objective like: *'To engage with the local business community'*, try: *'To attract an audience of 100 local business people, 50% of whom are new to the community foundation'*.

### What needs to be done first?

Begin planning the event as early as possible and at least three months in advance. Decide who is critical to the event's success and confirm their available dates. If possible hold three or four dates to give you the most flexibility when negotiating with venues, partners and suppliers. At Milton Keynes Community Foundation we share our key donor engagement event dates with other community organisations and stakeholders to avoid double-booking our guests. It is also important to avoid major national events and activities. For example, holding a reception on the night of an England World Cup Match or a business seminar on Budget Day will limit your audience and make your objectives more difficult to achieve. Once a date is agreed, send out 'Save the Date' emails or letters, as appropriate for your audience.

### What can you do to make your event really memorable?

The key to every successful event is creating an environment in which guests enjoy themselves. Here are the eight secrets to holding a memorable event.

#### Be selective in your guest list

Be clear why each person on your guest list is being invited, and how their presence helps achieve your objectives. Are they a potential donor, an ambassador for your organisation, do they add prestige to your event or community foundation? Ensure you have enough guests to create an enjoyable atmosphere without overcrowding the space. Invite up to 40% more people than you have capacity for to ensure a good rate of acceptances and, in our experience, up to 10% of guests who accept will not attend on the day for a variety of reasons.

#### Location, location, location

The space you choose should reflect the mood of the event and set the stage for enjoyment, so be inventive. Make a list of all the places your guests might enjoy and then reflect on how each location would contribute to the success of the experience.

Events held in exclusive or unusual venues really contribute to creating a memorable experience for guests. Private homes, eminent institutions, historic buildings, outdoor spaces and iconic views can all be a perfect setting. Buckinghamshire and MK Community Foundations held a donor event in the woods owned by a mutual donor which featured music, dance, acrobats and even a beach hut cinema scattered through the woods for guests to 'stumble across' and experience.

Don't forget to ensure the location is suitable for guests with disabilities or specific needs. Walk the route from the parking area to the venue to check that it is well-lit, that the distance is reasonable for guests with mobility challenges and that the surface underfoot won't prove a problem for guests in high heels.

#### Give guests a strong reason to come

Your prospective guests are busy people who receive many invitations, so make your event stand out by creating a programme that appeals to their interests and motivations. This could include a prominent guest speaker, an exclusive 'behind the scenes' tour, an appealing venue or personalised invitation from the host/hostess.

#### Work in partnership

Work with partners to maximise the impact of your event. Partners can add creativity, new audiences, resources, venues and prestige to an event.

For example, the Thames Valley region hosted a public debate on philanthropy and an invitation-only dinner for Fellows and donors in partnership with the Oxford Student Union. The iconic venue and chance to hear well-known speakers was attractive to donors from across our region.

#### Surprise people

Truly memorable events meet and exceed guests' expectations, so try and find ways to surprise and delight your guests. Keep one or two elements of your event programme a secret or reveal them at the last minute. These could include quirky touches such as a brass band or barbershop quartet welcoming guests on arrival, specially decorated cake, a handmade gift or paper lanterns or torches lining the route to the car park at the end of an event.

At TEDxMiltonKeynes, one of our speakers arranged to illustrate his talk on Generosity by arranging for every audience member to receive a wrapped present that they were invited to open during his talk. The spectacle of wrapping paper flying while the speech continued was only surpassed by the smiles and laughter of guests as they walked out the theatre with brand new kettles, irons and hoovers.

### Make the takeaway a talking point

Many guests think that the best part of an event is the goody bag. Of course you'll want to include brand-related items with your logo on them, but a little imagination can make all the difference. These items needn't be expensive, the key is to include things that are useful to your target audience as well as relating to your brand and the theme of the event. For example, at a Surviving Winter launch event, we presented each guest with a personalised 'bill' for an amount that would cover the costs of a vulnerable or elderly person heating their home for the winter.

### Plan the follow-up before the event

A truly memorable event does not end when the last guest leaves – that's only the half-way point. Plan your follow-up activities well in advance of the event. Thank you cards and 'call to action' materials can be prepared and signed before the event, ready to be posted the next day. Block time in your diary to make follow-up calls, meet up with guests and hold a debrief with staff and trustees.

At one of our events we asked guests to write a postcard to themselves stating the action they were going to take after the seminar – these were collected and posted to them in the fortnight after the event.

### Make it look effortless

Events don't always go exactly to plan, but guests should not be aware that problems have arisen. Make sure everyone in the organising team is well briefed and feels empowered to correct mistakes and respond to guests' requests.

Technology can be a great asset in delivering high-quality events, however it can go wrong, so presenters should rehearse before any event involving microphones, projectors and other technology. Including a good technician on your team ensures problems get fixed quickly.

### What human resources are needed?

Depending on the size and complexity of your event, you will require the support of paid staff, trustees and other volunteers to plan and deliver a memorable event. Make sure the team you put together understands the target audience so that the event exceeds their expectations.

### What can you hope to achieve by creating memorable events?

Memorable events can greatly enhance your community foundation's reputation, profile and supporter base.

Being a part of a memorable event helps your supporters to become closer to the community foundation and further connected to other donors, creating a genuine feeling of being part of something really special. Guests at memorable events also become ambassadors when they talk about it with their personal and professional networks.



### In a nutshell...

- Set clear objectives – why would it be beneficial to the future of the foundation?
- Location, Location, Location – an imaginative venue can provide an unforgettable backdrop.
- Who's who – target your guest list to include those who will help you achieve your objectives and create an enjoyable atmosphere.
- Plan a few surprises for your guests – imaginative food, impromptu entertainment and interesting goody bags can all put a smile on guests' faces.
- Brief and empower your team to deliver a great event.
- Follow-up – make sure you maximise impact by continuing to cultivate your donor relationships post-event.

Combine these elements together and you have a recipe for success.

# How to...

## Run informal events for philanthropists

**Ronnie Brown**  
Development Director,  
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Contributed by  
**The Philanthropy  
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### What is an informal event?

Unlike formal events that involve large numbers of attendees, impressive venues that need to be hired or provided as a gift-in-kind, and require a lot of investment of time and money to organise, informal events are distinct in their simplicity. They typically involve a drinks party for up to a dozen people in someone's garden or living room, but any event with a casual atmosphere and a lack of overt structure, would qualify. In addition, the explicit emphasis is on socialising rather than on educating donors – though the relaxed atmosphere can have the effect of generating more intensive conversations about philanthropy as it encourages people to open up. Topics emerge rather than being prescribed, but individuals' opinions, views and experience of charitable giving tend to be a central focus of the discussions.

### What are the first steps to organising an informal event?

Ask one of your key supporters, ideally an established donor, if they will host a gathering in their house. Whilst it is better if the invitations to guests come directly from the host, be prepared to offer administrative support to ensure smooth running of the event, such as getting the invites out on time.

### What else is needed for a successful informal event?

Whilst informal events should not make many demands on the time of community foundation staff and volunteers, it is important to pay attention to five key factors:

- Ensure the venue is easily accessible, that guests have clear directions and know where they can park.
- Discuss who will supply and pay for catering, and who will wash up afterwards! Be prepared to roll your sleeves up and help make it as easy as possible for the host.
- Decide what speeches or introductory words (if any) would be appropriate to start things off. For example, you can ask one of your attendees to speak from the heart about what their philanthropy means to them – individual stories are always a good way to get a discussion going.
- Have a current topic of interest to hand, such as details of a new philanthropy policy or a summary of relevant research, to help prompt discussion if required.
- Make sure to record the pearls of wisdom, quotes and ideas that any discussion generates, as they can be very valuable for gaining a better understanding of donors and for the community foundation's philanthropy development efforts.

### What are the benefits of organising informal events?

There is no doubt that informal social events have had a direct and beneficial impact on the development of the Fellowship programme in our region. In particular, they have:

- Contributed to a growing trust between Fellows.
- Attracted Fellows who do not attend any of the community foundation's more formal events.
- Made it easier to develop trust which has led to more open and challenging discussions in relation to views on charitable giving.
- Given the community foundation the opportunity to get feedback on, and ideas for, the Fellowship programme and our broader philanthropy advice work.
- Provided a template for sustaining the Fellowship programme after funding has ended.
- Required minimal input and organisational time on our part.
- Given us a template for broader fund-holder events that we could include as part of our 'mainstream' philanthropy advice service.



### In a nutshell...

Informal settings create an attractive atmosphere that enables guests to relax and strengthens bonds of friendship between donors. At the same time it provides a unique platform that demonstrates in action the community foundation's core mission of encouraging community philanthropy.

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# How to...

## Help philanthropists to open up

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Contributed by

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### Why should we help philanthropists open up?

Donor advice is a core part of the work of Community foundations, but encouraging philanthropists to open up is also an essential part of the work. This requires listening to what donors have to say with an open mind, regardless of the personal opinions of the adviser. No matter how far a person is on their philanthropic journey, they can be helped to open up by introducing them to new people, new ways of thinking and involving them in new movements. Such novelty can cause uncertainty and maybe a little concern, but handled well it should lead to a feeling of fulfilment and excitement that renews and reinforces their philanthropic motivation.

### How do philanthropy advisers start helping people to open up?

The key factors are: openness, knowledge and honesty. When someone approaches an adviser for help to grow their philanthropy, they need to be sure they will be listened to without prejudice and given all the necessary information to reach their own conclusions about the right direction for their philanthropy. They need their questions to be answered fully at the time or, if not, as soon as possible afterwards. Demonstrating in-depth knowledge and being honest about key details is reassuring to the person seeking advice and inspires confidence, leading to a stronger relationship built on trust and transparency.

### What sustains this approach?

A diverse programme of well-researched activities and events covering a range of topics (such as homelessness, crime and the arts) creates ongoing opportunities for donors to open up. Project visits and forum-style discussion meetings based on these topics allow for key information and statistics to be shared, and for interaction and engagement with people who work in these fields on a day-to-day basis. Varying the programme ensures that at least one topic will appeal to each member of the group; something that may be close to their hearts for personal reasons or simply a cause that they feel passionate about.

People often feel comfortable talking about what they know, standing up for something they believe in and sharing their experiences to help others achieve a greater understanding. Alternatively, if the topic hasn't previously caught their attention or is something they know very little about, they may embrace the opportunity to learn which provokes new thoughts and also challenges perceptions, resulting in broad-mindedness and better-informed philanthropists.

One-to-one meetings can work better for those who prefer to absorb information rather than contribute their own views to a debate or discussion. One-to-ones are a great way to get to know the individual behind the corporate image and often reflect the person in a different light which can lead them down a new path when considering their personal giving. One-to-ones do not always have to be scheduled in diaries and held in a formal setting such as an office – they can happen in informal conversations, and may be an impromptu addition to a structured activity, for example in response to being asked what they thought about the topic raised at an event. This encourages the person to share their opinion without the pressure of having to speak in front of a group of new people or without potentially inviting confrontation or causing controversy. Such informal responses can be fed-back indirectly at future meetings: *"He/she made a really valid point after the last meeting about X which relates here because Y"*. By highlighting the positive and constructive nature of their response, that person will feel involved and more confident when participating in future.



### How do donors benefit from opening up?

Opening up, and feeling included in, and responsible for, a project or other initiative ensures donors are motivated to make it a success. They can also use these opportunities to enhance their networks and to connect with like-minded people. They are proud of being a part of a group, such as a Fellowship or giving circle, and know that by working with community foundations and their new associates, they can begin to make the changes they feel are necessary through their philanthropic activity.

### How do community foundations benefit from donors opening up?

As philanthropists begin to understand what community foundations do and the services they offer, they often develop a greater interest in wider opportunities and express their willingness to get more involved. This not only shows signs that a positive relationship is blossoming but also demonstrates that the philanthropist is aware of their own ambitions and knows the direction they want to go in.

### What helps things to go well?

#### Good communication

Using a person's preferred method of communication, whether it be email, the telephone or post, can make a good impression as it demonstrates consideration for them and their time.

#### Appropriate benefits

As relationships grow new opportunities arise, such as sponsorship of events, and this allows room for negotiation between both parties to ensure the best outcomes all round.

#### Taking accountability

If anything did go wrong or mistakes were made, it is better to hold your hands up and apologise rather than making a situation worse by omitting details or avoiding it altogether.

#### Being diplomatic

If something negative happens that the other party is accountable for, remain diplomatic and work together to find an agreeable solution.

### What can go wrong?

It is never right to recommend a person gets involved in funding a project in order to meet targets or to simply have more faces around the table. Philanthropists have to be able to contribute something that is going to enhance the group or help the project to move forward in a positive way. In addition, they have to be interested in the project or service that is being offered; if they are not, they will neither commit nor be passionate about making it a success. It is up to community foundations, as philanthropy centres and community leaders, to ensure that any person wishing to participate is certain that the opportunity is right for them, that they do not feel pressured and that they are confident they will benefit from their involvement in some way.



### In a nutshell...

Five steps will encourage philanthropists to open up:

- Consistent communications
- Involving donors in decision-making
- Keeping people updated on developments
- Asking for opinions and approval
- Supporting ideas and suggestions

Following these five steps helps to build solid, open partnerships, that work for both donors and the community foundation.

# How to...

## Make philanthropy fun

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Contributed by

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### What has 'having fun' got to do with philanthropy?

There is a Chinese proverb that says:

*"Tell me and I'll forget; show me and I may remember;  
involve me and I'll understand."*

These wise words can be applied in all aspects of working with donors, to ensure that philanthropy services are delivered in an attractive and fun way, but still support donors' desire for greater understanding of their giving and aspiration to have a long-term, positive impact on causes they care about.

Events should be a particularly good opportunity to make philanthropy more sociable, fun and relevant, but they involve often frankly dull, corporate-style dinners and formal functions, at which donors get talked at. However, with a little more time and effort and a lot less money, you can involve your donors and show them directly the difference they have made.

At the Hampshire and Isle of Wight Community Foundation we run an annual initiative called 'Seeing is Believing', at which we invite donors to prioritise three choices from a list of funded community projects which they would like to visit. We then match them to two of the charities or community groups that hold an interest for them.

The resulting events are a little like speed-dating, charity style! We visit one community group in the morning, have a light lunch (at a food-based charity project if possible), then visit the other charity in the afternoon. By involving the charities and community groups and linking them directly to the person who is interested in funding their project, it can lead to truly rewarding benefits for all involved, including new and bigger donations as well as new volunteers and trustees.

### What is the trick to a successful 'Seeing is Believing' event?

The trick is to match the donor to projects that really interest them. Make sure you offer a varied selection, such as a youth-based project, an older people's/inter-generational project and one involving sports, recreation and the outdoors.

### What are the first steps?

Firstly, you need to make contact with charities that have received funding from your community foundation and delivered a really interesting project over the last year. Ask all these organisations to host a site visit, emphasising the benefits they might gain but also the importance of donor education in promoting philanthropy per se. Once a sufficient number have committed to participate, write a brief summary of each organisation, including a photo where possible, and send these with a covering letter/email to your donors and potential donors. Don't be deterred by a low take-up when you first offer 'Seeing is Believing' tours. The first year is likely to be the hardest, but once donors have engaged and seen the benefit of site visits, they are likely to be booked up in future.

### What preparation is essential before the visits?

Visit all the participating charities in advance to prepare them for the visit. Hosting donors is likely to be a new experience, and they may need to understand how it will work and how to make sure it is as enjoyable as possible. Look for opportunities to involve the visiting donors in a standard activity, such as chatting to older people attending a lunch club, or sorting donations to a food bank, as such 'front line' experiences will be far more memorable than listening to a speech on site. In our experience, donors want to see how things really are and to talk to the people who work at the charity and (if appropriate) to those who receive support from the organisation. Personal interactions are far preferable to an overly choreographed and 'staged' visit.



### **How much does it cost to run 'Seeing is Believing' events?**

Enjoyable events can cost less than boring ones! For example, we took six donors on a yacht run by the Ocean Youth Trust. It is not a fancy yacht, but a real old working 72-foot sailing vessel, which has charitable space in the harbour next to Millionaires' Row. This charity offers personal development through sailing to young people aged 12 to 25, the majority of whom come from vulnerable or disadvantaged backgrounds or face significant problems at home or at school. This innovative approach to the personal development of young people was of great interest to the visiting donors, who also had the chance to experience something new and see the impact of their funding. It was a really fun day out for all, including lunch on-board, and in total the event cost £100. How's that for a return on investment?!

### **In a nutshell...**

Think outside the box – it is a cliché but true. Community foundations have access to some amazing charities and projects through our grant making, so work with them to inspire donors and provide enriching, enjoyable experiences.

### **What steps should be taken to avoid problems?**

It is essential to have a basic risk assessment in place. Some visits, such as a sailing trip or other outdoor activities will require donors to complete insurance forms in advance. Getting these completed in time can be challenging, so make sure that you start the process early. Filling a load of forms in when you are trying to get out to your activity is not a great idea!

### **How can other philanthropy development be made more fun?**

- Use music to create a good atmosphere – a brass band will invigorate, classical music can soothe and jazz can make things seem more fun!
- Look for interesting venues that donors and potential donors would like to visit, whether it is an art gallery or a city farm.
- Try linking up with existing attractions and events – integrating donor's social life into their philanthropic activities means a donor can make better use of their social calendar.
- Invite spouses and partners – both may have influence over the family philanthropy – or invite the children and make it a more fun family affair.





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## Chapter 3

# Cementing the Fellowship





# 3

## Cementing the Fellowship

### OVERVIEW

During the second year of the programme, in 2013, the Fellowship progressed and became 'cemented' as part of the core activity of community foundations in all nine areas.

Moving the Fellowship onto this next stage often involved undertaking more sustained and in-depth work with participants. A notable example of more intense engagement was a two-day residential trip to the Isle of Mull in August 2013, organised by Foundation Scotland, which took the concept of site visits to a new, deeper level. Other innovative events in year two included a lunch with eminent speakers on International Women's Day and a Family Philanthropy Supper, both in the Thames Valley area, and a trip to the top of Blackpool tower in the North West region, which enabled:

*"Fellows, friends, donors and prospects to learn more about the needs and aspirations of their local communities through the outstanding visuals on offer, combined with stories and statistics from Lancashire's Vital Signs giving report that the Foundation had launched that same month."*

Despite the success of these events, many regions took the decision to shift the focus away from organising events and on to holding more private one-to-one meetings, because it is in this setting that the community foundation's knowledge and networks can be best demonstrated and most effectively deployed to assist donors in creating and revising their philanthropic strategies. By the end of year two, a total of 320 one-to-one sessions had been held with Fellows and friends.

Another manifestation of the shift towards a new strategy in delivering the programme came in three regions that chose to use most of the funding to pay the salary of a new staff member: in the North East a new post of Grants and Donor Services Director was created; in the Thames Valley region a new Director of Development was appointed; and in the North West a Special Projects Officer was recruited. Whilst other regions did not create new posts, many used some funds for staff training and increased their long-term capacity by upskilling their philanthropy development team. These decisions reflect the flexible philosophy of the funder, which allowed each area the freedom to use the funds as they saw fit.

Wider impacts and benefits of the programme began to emerge in year two. For example, the four participating community foundations in the South East region had chosen an equal approach to organising the programme rather than the 'hub and partners' model used in the other six regions that involved multiple foundations<sup>1</sup>. By the end of year two, this was creating additional benefits for the South East region who noted:

*"The Philanthropy Fellowship programme is not only giving us more time to spend with our donors but also more time for the four Chief Executives to share information, improve communication and build skills, particularly in supporting donors."*

#### Progress by the end of year two:

- A total of 158 Fellows had been identified.
- A total of 1,501 friends (defined as other donors engaging with, or in some way benefiting from, the programme) had been identified, which far exceeded the final goal of recruiting 900 friends by the end of the programme.
- A total of £17.8 million of additional money had been unlocked, which was £5 million more than the collective target for the end of year two.

The funded areas continued to outperform from both their baseline and the control group. In particular, the data shows a welcome increase in the capacity of funded community foundations to offer one-to-one sessions. By the end of year two, one participating foundation (Scotland) reported being able to offer one-to-ones to every donor that wanted one, and none of the nine funded regions reported being able to offer one-to-ones with 'few or none' of their donors.

There was also an increase in the ability of community foundations in the funded areas to take their donors on site visits. At the end of year one, a majority (five of the nine areas) reported a low offering ('few or none') in this regard, whereas by the end of year two, six areas were able to offer site visits to 'some' or 'most' of their donors.

Finally, enabling donors to network with each other continued to be a strong success in the funded areas. Over three-quarters (78%) reported offering this opportunity to 'most' or 'all' of their donors, and the rest were able to offer networking events to at least some donors. This indicates that the notion of 'fellowship' had become cemented as a core part of the participating community foundations' work.

#### Sharing the Learning

The rest of this section contains three contributions from participating Community Foundations, sharing their learning from around the country on how to cement a fellowship of philanthropists:

- How to provide inspiring experiences for your donors
- How to get a long way from the office
- How to work with philanthropists to explore and choose options

<sup>1</sup> In two regions – Scotland and London – only one community foundation was involved.

## How to...

# Provide inspiring experiences for your donors

**Kevin Richmond**  
Chief Executive, Sussex  
Community Foundation

Contributed by  
**The Philanthropy  
Fellowship South East**

### Why get out of the office with donors?

The success of a community foundation is based on the quality of its relationships with donors. Getting out of the office to learn about local needs by visiting charities is a powerful way to inspire donors and help them to be more effective in their philanthropy. When donors and potential donors have the opportunity to see at first hand the difference being made by local groups, particularly groups they would not have heard of, then they become more convinced of the value of supporting local charities and more inspired to give through a community foundation.

Taking donors on trips away from the office involves a significant investment of time but can be very valuable, especially if you believe that the guest has the potential to be a valuable supporter of the foundation. The charities should be chosen to match the individual interests of the donor and the itinerary should be planned to ensure that you have plenty of time during the day to get to know them better.

### What does it involve in practice?

Getting away from the office can take many forms. It may be a bespoke visit for a single donor to charities that meet their particular interests, or a group visit for a number of people with varied interests. At Sussex Community Foundation we are developing a model which combines site visits with presentations and discussions to put the visits into a wider context, with the goal of informing our donors and helping them to plan a strategy for their giving. There is no perfect formula but successful activities away from the office share some common factors:

- The best events allow donors to experience the work of a charity on a personal level, the more direct the experience the better.
- It is most powerful if donors can meet the people who are benefiting from the charity, such as a former homeless person who is being helped back to work by a rehab centre, or a young person who is helping to lead a youth group. This does need to be well managed and the charity concerned needs to be confident that their service user is able and willing to talk about their experiences.
- If it is not possible to meet service users then try to get as close as possible to the coal face. Volunteers or staff who are directly involved in the service are good, but remember that Chief Executives have a tendency to 'sell' their organisation rather than talking from the heart.

### What preparation is needed?

A key role for community foundations is to act as a bridge between people who have money to give, and those who are working at the frontline of local communities. These two groups of people do not often meet and both may feel uncomfortable when they come together. Good briefing and support for the charities and the donors can help ensure the interaction is a positive experience for everyone.

Ask the charities to talk from the heart as much as possible, to explain what they do, why they do it and the needs of the people they are helping. Most importantly, ask them to explain the difference they are making.

When briefing donors, we tell them which charities they are going to see, explain what needs those charities are meeting and why it is important. We also remind donors that the visit is not a monitoring visit and we do not expect our hosts to answer very detailed questions about the published accounts!

### What role does the community foundation play?

The role of community foundation staff is to act as the tour guide for the day, which involves three key tasks:

- Making sure all the practical arrangements, such as timing, travel and parking, go smoothly.
- Helping donors to make sense of the visit by putting what they see and hear into a broader context.
- Being available to answer any questions and discuss issues. This can include explaining any jargon used by the charities, as well as supporting a host charity facing challenging questions.

Being the tour guide is a great opportunity to get to know donors better, to demonstrate the depth of understanding that community foundations have about the local community and, most importantly, to help our donors understand local issues better.

### What pitfalls need avoiding?

Perhaps the most valuable benefit of getting out of the office is the chance to spend quality time with donors and to get to know them better. But remember that the donors who come along may be even more interested to meet the other donors and to share their experiences, so make sure you give them time to meet each other as well as you!

Good planning and organisation are essential for successful work with donors away from the office. You need to plan the logistics carefully, thinking, for example, of where people will park and how long it will take to travel between different sites. It can be a complicated process to organise a group of people visiting two or three charities and you want to make sure they remember what they saw and learnt from the charities rather than the fact that they spent two hours trying to find a parking space!



### In a nutshell...

- Choose charities that are able to provide a good experience and that can handle a visit by a small group.
- Invite donors, prospects and trustees who lived in the local area or who are known to be interested in the issues covered.
- Prioritise taking trustees and existing donors rather than new prospects.
- Tailor the size of the group you are taking to the size of the charity you are visiting. A small grassroots group can only accommodate two or three people, but a large homelessness charity may be happy with 20.

Getting away from the office to visit charities should not be confused with a fundraising event. It is an opportunity to help donors to understand the needs they can meet and the impact that local charities and community groups are having.

# How to...

## Get a long way from the office

**Nick Addington**

Head of Philanthropy Services,  
Foundation Scotland

Contributed by

**The Philanthropy  
Fellowship Scotland**

### What's the point of getting a long way from the office?

Community foundations are used to taking donors on visits to projects, either to show them the difference a donation has made or to help them learn about topics or issues of interest to them. The value of these 'Seeing is Believing' visits is widely acknowledged in providing opportunities for donors to meet workers and beneficiaries in order to hear first hand about their lives, achievements and challenges; to give them direct insight into the reality of the situations they are looking to make a difference to; and to give them 'stories to tell' when talking about their philanthropy. Such visits are often organised over a half or full day and might include visits to more than one site or organisation. By giving donors access to people and places they wouldn't normally encounter, the community foundation plays a valuable role in facilitating donors' learning and creates unique experiences for them. Visits may also allow the community foundation to demonstrate its own expertise and insight into local community needs as well as creating valuable opportunities to spend time getting to know clients and building relationships.

Foundation Scotland has taken this a step further by organising a residential visit, spread over two days, for donors to undertake a longer trip than would normally be feasible and to create greater opportunities for in-depth learning and relationship building. Our first visit, undertaken as part of The Philanthropy Fellowship, was to the Isle of Mull off the North West coast of Scotland in summer 2013 and involved visits to four community-led organisations encompassing several different initiatives and social enterprises.

### What are the benefits of an extended trip?

- It allows for more in-depth exploration of topics and themes, or for a few different topics to be combined in one excursion.
- It creates opportunities to explore the same theme from multiple angles, comparing or contrasting different organisations or approaches.
- It provides more time to spend with organisations and beneficiaries.
- It extends opportunities for building relationships with participants, and also with host communities and organisations.
- It has the potential to connect different types of stakeholder in a meaningful and enriching way by inviting others to join the visit.

- It may be more successful in attracting some donors than briefer events, as some very busy people are, with sufficient notice, more likely to put a chunk of time like this aside – and to protect it from later demands – than they are to attend smaller events or visits, especially if the community foundation covers a larger geographic area so some events aren't very local to them.

### What decisions need to be made at the outset?

As an extended trip will involve a relatively substantial amount of effort and resources, it's worth taking the time to think these through. Considerations that affect where you go, how you use the time, and who you involve include:

- Are there donors – or prospective donors – that you'd particularly like to influence? What are their interests, or what do you want to help them learn and think more about?
- What do you know about your donors' interests? What has your research told you about the kinds of things they'd like to know more about or visit?
- Are there particular geographic areas, communities of interest or topics that as an organisation you'd like to learn more about or want to highlight to your stakeholders?
- Are there different people or stakeholder groups you'd like to make a connection between?
- Do you want to use the visit to support marketing or communications activity, e.g. by capturing photographs, video or case studies?
- Are there particular grants you've made that you want to follow-up, celebrate and raise awareness of?
- Is there a cluster of potential sites/organisations to visit to create a high-quality itinerary?
- Is there an organisation that could manage local co-ordination for you? Do you have a trusted local contact who can advise or act as a guide?
- Accommodation and catering – is there a suitable establishment of the appropriate quality and with any other facilities you need, e.g. a meeting room perhaps?

### How can the costs be covered?

Naturally, a residential trip will cost much more than a half-day project visit and securing a budget will be a key requirement. Here are some suggestions:

- Charge your clients or prospects – pitch it as a unique learning opportunity and ask them to contribute not just the direct costs of items such as accommodation, but also to support the organisation of the trip.
- Seek grant funding – especially if you include volunteers and community stakeholders in the group you may be able to attract a grant to support it as a learning and development initiative for them/your organisation.
- Consider whether your own learning and development budget can be drawn on, if the trip supports the development objectives of staff, trustees and/or committee members.
- Don't just budget to cover the explicit costs, also make donations to the groups you visit or that assist with the organisation of the trip.

### How can the value of the trip be maximised?

- Give the trip a theme and arrange visits that shine a light on the theme in different ways. The theme of our Mull visit was 'Community Works', looking at community-led enterprise and its role in economic regeneration.
- Arrange joint travel – to the destination if possible and certainly once you are there. We found the most productive conversations were the ones on the minibus between visits.
- Give participants a light briefing in advance – make sure they know who's coming, that they understand the theme, why you've selected the projects you're going to visit and perhaps introduce some of the questions and debates you expect to explore, but don't ask them to read too much.
- Maximise the time available – consider inviting guests or speakers to dinner, hold a breakfast meeting or discussion. We used the ferry trip back to the mainland for a debrief discussion.
- Build-in social time, e.g. after dinner, to let people relax and enjoy the trip and to promote relationship-building.
- Use local social enterprises wherever possible – e.g. a community transport minibus or community café for lunch – to highlight more third sector projects even if they're not the subject of the main visits.

### What's the best way to follow-up an extended visit?

- Try to build-in time for a debrief discussion with participants to distil their experiences and learning and to note the questions and debates it has opened up before you go your separate ways.
- Evaluate the trip with all participants afterwards and find out what worked well and what didn't.
- Write a brief report capturing why, how and what you did together with the evaluation findings.
- Record key points arising from discussions with donors during the trip and ensure you build on this experience with them by updating plans and targets accordingly.
- Share the experience: Write-up case studies of the groups you visited; feature the trip on social media; ask one of the participants to write a blog describing the trip from their perspective; open discussions with stakeholders on key debates or questions the trip has highlighted.
- Thank the organisations that hosted you and share any key observations or feedback from participants to ensure that they get value from the experience too.



### In a nutshell...

- Start planning well in advance – several months, ideally – in order to get the time in people's diaries and to secure the local facilities and participants you need.
- Identify a couple of possible destinations in order to explore their feasibility before making a decision.
- Share initial discussions across teams within your organisation in order to maximise opportunities from the visit.
- Draw-up objectives so you know what success looks like and what you need to evaluate afterwards.
- Ensure someone has clear responsibility for practical arrangements and liaison with attendees. This could be a volunteer, but make sure they know who to go to with queries and problems.
- When thinking of accommodation and catering, bear in mind that although some of the project visits may take participants out of their comfort zone, the trip overall should be a pleasant experience.



## How to...

# Work with philanthropists to explore and choose options

**Derry Nugent**

Head of Philanthropy  
Services, Tyne & Wear  
and Northumberland  
Community Foundation

Contributed by

**The Philanthropy  
Fellowship North East**

### Why do philanthropists need help exploring their options?

Whatever the means available to a philanthropist or their stage on the philanthropic journey, they can benefit from advice that enables them to access and use information to plan their giving, and that helps them to explore the implications and options available to them. Such advice is valid at any time, not just when starting out or when confronting an imminent charitable decision. Indeed, people with long experience of giving may welcome the opportunity to reflect on what has happened.

### Why do community foundations explore philanthropic options with donors?

The endowments which community foundations build provide an asset that benefit their communities in perpetuity. Therefore the relationship between a donor and their philanthropy adviser is intended to be long term, so it is important to take time to establish this relationship in order to build trust and mutual respect. Rapport matters, so identify the right person to work with each philanthropist. Being a good adviser begins with being a good listener. Listening is the cornerstone skill for any adviser but is especially important for philanthropy advisers because the nature of what motivates people to give is very personal – it is as much an emotional as a financial response. Listening leads to reflection, testing, further reflection and learning, and these stages will take different amounts of time for each person. An individual's philanthropy will not necessarily follow a single path forever: deviations and iterations in thinking should be expected and encouraged.

### What tools are available to help philanthropists explore options?

Any tools should be tailored to the individual and a balance struck between too lengthy an interrogation and too few questions, which may not stimulate sufficiently in-depth thinking. It can be helpful to provide a short list of issues or ideas, perhaps in the form of a Philanthropy Questionnaire (see Appendix 2 for an example questionnaire) before the first meeting. This will help to identify important areas that they want to explore further. The process will also highlight those areas that are 'off limits' for further discussion, which must of course be respected. Providing written feedback on the discussion is important to check that you have correctly heard and interpreted what the philanthropist said, and creates an opportunity for further reflection. This structured approach will give the best foundation for the next stage of the advising relationship.

### How can the first discussion lay the best foundations?

Early discussions are likely to focus on particular issues or causes that are closest to the philanthropist's heart. It is essential to clarify why these are important and what appeal they hold. Three other key issues should be established from the outset:

- What type of interventions the philanthropist is most interested in – do they prefer to support capital costs (such as buildings and equipment) or revenue costs (such as salaries); do they feel more comfortable supporting groups or individuals; and do they envisage funding project activities or policy-related work, such as campaigning.
- How they like to receive information and how they make decisions. All people have preferences in these areas and may not be aware of them. Some people prefer to receive detailed, highly-researched written material, whilst others want concise briefings. Some want to take decisions alone whilst others consult with their family or other trusted confidantes. Some want to visit projects and meet key staff whilst others prefer to 'take a punt'.
- What they are seeking in terms of feedback – do they prefer written acknowledgements, photographs or videos? And explore their views on how best to measure success. Some philanthropists may have a good understanding of 'outcomes' but this formal or programmed approach may be totally new or unwelcome to others.

Having gathered this information, the role of the philanthropy adviser is to research relevant information and options, drawing on their knowledge of social issues and interventions, to enable the formation of a professional judgement on how the philanthropist's specific wishes and circumstances may best be met.

### What is a 'theory of change' and what role does it play?

Having a theory of change is considered a hallmark of being a 'strategic philanthropist'. It is set out as a statement of a problem, a suggested solution and an anticipated outcome in the form of '*If X happens then Y will follow*'.<sup>1</sup> For example, a theory of change for a community foundation could be:

If people and businesses who have the capacity to give to local causes get the benefit of community expertise, high-quality donor services and working through an organisation with profile and influence, then their philanthropy will grow and have greater impact on social justice and civil society in our area.

<sup>1</sup> Charities Evaluation Service and New Philanthropy Capital have developed extensive materials to help charities work out their theories of change. Members of UKCFs have also developed some materials for members.

For individual philanthropists a theory of change can help to describe what they want to achieve and set a framework for measuring the success, or otherwise, of their approach. They are a powerful tool for philanthropists who often appreciate having a structure to test out the effectiveness of their giving. However, the theory of change approach will not suit everyone, and some may reject it as too formal or not appropriate for their level of giving. For example, a philanthropist who decides to support a lunch club with £1,000 because the *'old people will enjoy it and be less isolated for a few hours'* has made a reasoned decision based on their understanding of need and effective use of available resources.

### What happens after initial discussions?

Having thought through their philanthropic aims or set a theory of change, philanthropists can then start testing their ideas, usually by making grants. They may also test other forms of philanthropic activity, like giving their time or expertise. Once the results of grants or other interventions are gathered it is appropriate to reflect with the philanthropist on these findings to check that what happened in reality matches their hopes and expectations. There will be surprises and some grants will not go as planned: this is to be expected, and there should still be useful learning for the philanthropist and adviser that can guide future giving.

### Why does this process continue indefinitely?

An ongoing review process is important to ensure that philanthropists continue to develop and learn from their experiences. A more extensive review is required when successors, such as the next generation, start to become involved in order to review original motivations and explore how they might develop. Furthermore, as social needs and views about the ways of meeting them change, so philanthropic action will need to keep up – as will philanthropy advisers!

### What is meant by 'learning' in this process?

Philanthropy advisers should approach the concept of philanthropists' 'learning' with caution, as many may see it as patronising or worse. However, viewing learning as an enhanced form of reflection means it is possible to provide a number of opportunities that will give the philanthropist and the adviser access to more opportunities to explore options for their giving. These can be categorised in three ways:

#### Sharing

Formal activities to analyse issues and develop ideas including discussions; topic-focused seminars; training events; and briefings on issues (e.g. publications covering topics like 'the shape of voluntary sector', 'why fund core costs' or 'supporting volunteering').

#### Experience

Activities including structured visits to community projects focused on themes or geographic issues; short-term shadowing or through supporting the investment of time and expertise which strengthens funded organisations.

#### Peer networking

Activities where philanthropists can interact with their peers, including giving circles, themed funds (such as 'the environment' or 'women'), or sharing experiences or expertise with other philanthropists in a group or one-to-one. For the most engaged philanthropists this might include a day conference, an extended site visit or a 'retreat' style event.

Including philanthropists who give outside of community foundation in these activities will enhance the breadth of experience and exposure to wider thinking.



### In a nutshell...

- Engaging with good quality, competent philanthropy advice helps donors to think through what it is they want to achieve and the difference they want to make with their giving.
- 'Thought Through Philanthropy' is a useful way to describe the benefit of working with a philanthropy adviser at a community foundation.
- Not all of the above ideas will appeal to every philanthropist, but being able to offer them is part of the role of the knowledgeable, skilled, thorough and prepared philanthropy adviser.

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## Chapter 4

# Sustaining a Fellowship



# 4

## Sustaining a Fellowship

### OVERVIEW

In the third and final year of the programme, the question of sustaining The Philanthropy Fellowship came more sharply into focus. Whilst the funding from the Esmée Fairbairn Foundation ends in December 2014, there is a general consensus that the work it has enabled should not come to an abrupt halt. As with most aspects of this programme, the decision as to whether and how to continue the Fellowship rests with each community foundation. However, there is a shared view amongst the staff leading the work in the nine regions that the activities undertaken as part of this programme are – and should be – a core part of the standard offering of community foundations. There is therefore no discernible appetite to end the spirit of the Fellowship activity once the funding ends. What this means in practice is likely to be one of two options:

- The Fellowship continues in name as an identifiable, branded network for donors.
- The Fellowship continues in spirit, and is absorbed into the standard practice for working with donors.

Despite the importance of addressing this question, it has by no means been the sole preoccupation of the nine regions during 2014. Fellowship activities have continued apace, including some major events such as a 'Morning on the Gallops' in Newmarket, organised by the East region, a preview and dinner at Abbott Hall Art Gallery in the North West region and an event at the Mansion House in London, hosted by the Lord Mayor. Fellowship events also continued to offer unique experiences, either by virtue of the venue or the chance to hear a distinguished speaker, these included a South East Fellowship sailing trip to see first-hand how the work of the Ocean Youth Trust develops the skills and confidence of young people, and a North West Fellowship event held at the Everyman Theatre in Liverpool, which was addressed by the Duke of Westminster.

The shift away from mass events to more intimate support has also continued, not only in terms of offering more opportunities for one-to-one sessions but also for brokering smaller-scale connections for and between people with shared interests. For example, a 'Women in Philanthropy' event was held in Dorset by the South West region and all regions organised site visits for individuals and small groups of donors who expressed a wish to see particular types of charitable activity in action. A typical reflection on the benefits of this work, which comes from the team behind the London Fellowship is that it:

*"Reinforces our belief that by gathering people together around shared interests and responding with bespoke cultivation we can increase the amount of giving to community foundations. Our ability to explore (and then refine) a variety of bespoke responses is a key result of the funding provided by the Esmée Fairbairn Foundation."*

### Emerging initiatives: giving circles and professional advisers

Year three was not entirely 'business as usual'. Two new strands of work came to the fore in this final year: support for collaborative giving vehicles in the form of giving circles and the proactive forging of links with local professional advisers (also known as 'other trusted advisers') such as lawyers, accountants and will writers.

The Women's Fund for Scotland, the Rosa Giving Circle in Suffolk and the Medway 100 giving circle in the South East, are just three examples of the move towards supporting collaborative giving that have emerged as one of the key outcomes of the Fellowship. For community foundations that have not yet explored this option, practical advice on how to set up and support a giving circle is provided later in this section.

Events targeted at the local professional adviser community took place in many regions, including Yorkshire and the North East. These events enable community foundations to explain what they do and how they can be of help to for-profit advisers whose clients may now, or in the future, be seeking advice related to philanthropic matters. Practical advice on how to emulate these initiatives is also provided in the following pages.

### Progress in year three

This report is published a month before the end of the third year, so the final numbers cannot be reported in this document. But it is a matter of considerable pride to all involved that the key final targets agreed with the funder were already met by June 2014, when:

- 212 Fellows had been identified, against a target of 200.
- Over 1,500 friends had been identified, against a target of 900.
- Over £25 million of additional money had been unlocked, against a target of £22.5 million.

The data received so far from the control group also continues to provide evidence of the advantage afforded to community foundations within this programme.

### Sharing the Learning

The rest of this section contains three contributions from participating community foundations, sharing their learning on how to sustain the Fellowship in their area, covering the following topics:

- How to appeal to younger professionals
- How to work with professional advisers
- How to set up and support a giving circle

# How to...

## Appeal to younger professionals

**Gabrielle Sturrock**  
Development Manager,  
The London Community  
Foundation

Contributed by  
**The Philanthropy  
Fellowship London**

### Why should community foundations focus on younger professionals?

There are three good reasons to focus on younger professionals:

#### First

Working with younger professionals is a great opportunity to grow the community foundation's base of individual donors. Younger professionals' capacity to give is likely to grow over the course of their careers, and by reaching out early on, community foundations can encourage them to get into the habit of doing some of their giving locally.

#### Second

It's a chance for the community foundation to build its profile within target professional sectors, by demonstrating knowledge and leadership to employees. Roundtables, guided tours, and site visits to educate younger professionals about philanthropy can build on a desire to be more connected to their communities, and the growing awareness that giving back is good for their careers.

#### Third

Providing access to philanthropy education and giving tools for employees can strengthen community foundations' relationships with existing corporate fund-holders, and enhance the offer for potential donors. Further, the opportunity to sponsor unusual philanthropy events can open doors to potential donors.

### What can community foundations offer younger professionals?

The offer that community foundations can make to younger professionals can be summed up in three words: knowledge, experience, and tools. Community foundations know about needs in their communities, and are aware of the fantastic people addressing those needs in effective and interesting ways. This knowledge can be shared with younger professionals through a variety of ways including events, forums and one-to-one discussions.

Site visits and inspiring first-hand accounts from charity beneficiaries provide younger professionals with experiences that stay with them for life. Giving circles, donor advised funds, and community grants panels are great tools for younger professionals to translate their new-found knowledge of community needs into practical results.

As philanthropist Nicola Horlick pointed out in Policy Exchange's 2007 Give and Let Give report:

*"It is very good for you to have outside experience other than what you're doing full time because in strange ways it can create new ideas for your day job. If you're meeting new people and having new thoughts about a completely different subject it can lead to lateral thoughts which can be beneficial to you professionally."*

### How can community foundations reach younger professionals?

The key is to activate your networks. Ask existing corporate fund-holders for access to their staff, and to co-host an event. Ask potential corporate donors to sponsor an event and invite their staff. Join discussion panels at partners' events. Send your development team to networking events. The London Community Foundation regularly attends networking events for staff working in the wealth management sector, and relevant events held by law and accountancy firms.

### What works best when working with younger professionals?

The best format and content for a philanthropy event aimed at younger professionals obviously depends on the particular audience, but something short and unusual often works best. For example, to share our knowledge and provide an interesting experience, we take groups of younger professionals on alternative tours of the capital. We've taken groups on a tour of Mayfair, guided by a man who used to sleep rough on the streets there. We also take groups up on the London Eye, presenting the London hidden behind the landmarks, and highlighting the ways some people are changing their communities. Other impactful experiences can be site visits or events put on by other charities.

Younger professionals are often keen to meet their peers and to learn from more established philanthropists. They come to our philanthropy workshops to connect with others who are at a similar stage in their giving or their career. Our most successful events have featured fund-holders talking about their motivations for giving and sharing the enjoyment they've gained from changing people's lives, with lots of concrete examples. Having ample time for questions is key.

### In a nutshell...

- Younger professionals are often time poor so schedule events as far in advance as possible to ensure a good turnout.
- Timing is important, brief after-work events on Tuesdays or Wednesdays work best.
- Be a good host! Provide snacks and drinks if possible.
- Cover costs by seeking corporate sponsors to co-host events in return for providing a venue and/or paying for the catering.
- Provide background reading if appropriate, such as a case study or recent assessment on the charities under discussion or being visited.
- Encourage networking – peer-to-peer relationships are important for this age group.
- Follow up attendees by offering one-to-one meetings in which they can fully explore their philanthropy and develop a strategy to meet their goals.



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# How to... Work with professional advisers

**Sally-Anne Greenfield**

Chief Executive, Leeds  
Community Foundation

Contributed by

**The Philanthropy  
Fellowship Yorkshire**

## Who are professional advisers?

In the community foundation context, professional advisers are people whose work brings them into contact with potential donors, such as solicitors, accountants, bankers, independent financial advisers, tax planners and wealth managers.

## Why are professional advisers important to community foundations?

A significant – and increasing – number of referrals to community foundations come via professional advisers, but this does not happen by chance, it needs to be planned carefully. Research shows that around one in five wealthy donors consult with professional advisers about their charitable giving (Breeze & Lloyd 2013, p.174) so they can be important allies. But the local community foundation can be seen as a competitor by for-profit advisers, who may prefer to keep all their clients' business 'in-house', including their philanthropic activity.

Professional advisers are not only useful for referrals, they can also become supporters. Financial support may come in the form of them joining a membership scheme, sponsoring an event, setting up a Fund or encouraging employee fundraising through events and payroll giving. Non-financial support is also useful, notably in the form of pro bono advice for groups supported by the community foundation, for example around budget setting, business planning and legal issues.

## What needs to be done before approaching professional advisers?

Professional advisers should be treated as a target group in their own right and a detailed engagement plan drawn up as to how you will both establish and maintain contact with them on a regular basis. Start by doing some research to find out which professional advisers operate in your area. This can be done online as all will have websites that include details of the services they offer and contact details of key staff.

## How to approach professional advisers

It usually makes sense to begin by contacting the senior partner; ask them for a meeting to introduce yourself, to explain what community foundations do and how you can bring value to the firm's clients. Ask to be put in touch with colleagues who work in relevant areas such as trust law and legacy planning.

Ideas from community foundations across the country include:

- Set up an advisory group of professional advisers to help devise and deliver your plan.
- Have a range of printed materials on the various services you offer that are easy for professional advisers to download.
- Publish a separate e-newsletter targeting professional advisers.
- Seek combined PR for any success stories involving clients and professional advisers.
- Change the term 'professional advisers' to 'trusted advisers' and include yourselves as part of that group.
- Attend gatherings, events and seminars that are aimed at professional advisers to show that you are '*one of them*'.
- Put on your own events programme – at least one event a year – to specifically target professional advisers in a seminar-type environment.
- Contact the local Law Society(ies) and other professional membership bodies to ask if you can speak at one of their events and/or write an article in their publications.

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## What can community foundations offer to professional advisers?

It is important to ensure that relationships with professional advisers involve reciprocal benefits, otherwise they will struggle to make time for you. There are four key areas where you can offer a service:

### Advice to clients

Some firms have less confidence in speaking to clients about philanthropy, so offering to attend part of a client meeting to contribute advice is sometimes popular. You need to be able and willing to talk impartially about charitable giving and not just go in and sell your own services.

### Information for clients

Many firms have regular mailings, newsletters and information on the website to which you can contribute content. You could contribute an article on a topical subject, such as the recent introduction of Entrepreneurs Tax Relief, or more general advice about philanthropy.

### Advice for staff

Many professional firms lack experience in talking to clients about philanthropy so working with and learning from the community foundation can help them deliver professional development to their staff. This can be on a one-to-one basis or through running seminars or workshops that talk about working with clients around philanthropy.

### Redundant client accounts

Redundant accounts occur when firms receive money to perform a service, such as house conveyancing or writing a will, and upon completion of the transaction the client cannot be traced to refund any spare monies. This situation often comes about when a firm takes over another firm and the records they inherit are incomplete. Community foundations can accept such monies, although it is necessary to offer an indemnity to the professional adviser to cover any eventuality that the client comes forward, in which case the money will be given back. As the sums of money involved are often very small, this is a low-risk strategy that can make a cumulatively significant difference.

## How can community foundations position themselves as trusted allies of professional advisers?

It is obviously not enough to simply go to a professional firm and say "*please introduce us to your clients*"! You first of all need to demonstrate that you are worthy of their trust because they are understandably very protective of their clients and will want to check your credentials and capability.

They will expect you to demonstrate similar attributes they would ascribe to their own services:

### Excellent customer care

You will need to demonstrate an ability to deal professionally with customers that might be enshrined, for instance, in a code of conduct regarding time-scales for returning calls or emails.

### Professionalism

They will expect your written communications to be accurate and high quality, for example your website should be up-to-date and your reception should be efficiently staffed.

### Advisory skills

Your experience of offering advice to donors and your fee structure should both be clearly communicated, ideally with testimonials from existing supporters.

### Knowledgeable

You will need to demonstrate in all interactions with professional advisers that you are knowledgeable about your work and up-to-date on issues affecting the wider charity sector.



## In a nutshell...

Building strong, trusting relationships with professional advisers who can refer clients, become supporters and offer in-kind support, is time very well-spent.

# How to...

## Set up and support a giving circle

### Anna Douglas

Development and Marketing Manager, Norfolk Community Foundation

Contributed by

The Philanthropy Fellowship East

### What is a giving circle?

Giving circles are groups of people who choose to contribute their money and/or time to benefit causes that they choose collectively. Giving circles are growing in popularity in the UK because the combination of generosity and sociability has wide appeal. Giving circles can create many additional benefits, including educating members about needs and worthwhile causes as well as making their giving more impactful and meaningful.

### Why do community foundations set up and support giving circles?

Giving circles are a good option for community foundations that want to develop their offering to appeal to, and engage with, a wider audience. Giving circles can encourage philanthropy in a number of ways: they can provide an attractive 'first step' on a philanthropic journey for someone who has never given strategically before, and they can be a refreshing new approach to giving for donors who have previously only made individual giving decisions. Giving circles can help to ensure the sustainability of a community foundation by helping it to grow a bigger 'pool' of donors who may set up individual funds in the future.

### What needs to be done first?

As with any new initiative, it's important to begin by defining clear objectives and message. In the case of the Norfolk Community Foundation (NCF), our objectives were twofold: Firstly, to establish a membership group targeted at aspiring and/or rising business people which combines networking with building a new fund to support local charities and grassroots groups covering all types of causes. Secondly, to create a new 'entry level' to the foundation for a new generation of donors who would progress to greater philanthropic activities in the future.

### Agree beforehand, what success will look like

NCF decided that a successful giving circle would have 100 members, each making monthly contributions of £25, so that each member donates £300 per year, resulting in a new revenue fund of £30,000. The Gift Aid collected on all eligible donations made by taxpayers covers the ongoing costs incurred in supporting the giving circle, so we can accurately reassure members that every penny they contribute will be put to good use in the community.

### What human resources are needed?

Although a giving circle is made up of members, they are likely to need support and encouragement from paid staff, trustees and other volunteers to get started. It's important to choose a project team that reflects a similar profile to the targeted audience in order to ensure their thinking is in line with the proposed new donors' viewpoint. NCF created a project team comprised of two of our staff members (our

Chief Executive Officer and our Marketing and Development Manager) and three senior volunteers (one of whom works as a professional adviser, a member of our development committee and a former CSR manager).

### What financial resources are needed?

Giving circles are intended to attract new donors and additional donations, but they will require some financial investment at the start. Be sure to agree a budget in advance and try to avoid the escalation in costs that affects many new projects – don't forget to budget for items such as the cost of organising and hosting consultations with potential giving circle members and staff time or the cost of using an external facilitator if you choose to convene a focus group of potential giving circle members. Whilst community foundations are often successful in attracting pro bono and in-kind contributions, it may be sensible to budget for the cost of venues and catering for initial discussions as well as the launch event and subsequent hosted events, not forgetting the costs of designing and printing any branding and promotional materials.

### What can you do to increase the chances of success?

If you hope the giving circle will appeal to a particular type of audience, such as young professionals, working women or new retirees, then include some representative people in the process from the very start to ensure they are getting something they want rather than what you think they want. At NCF we created a focus group of aspiring and/or rising business people to get their input to shape the project and find out what would work for them and like-minded individuals. By keeping these people involved at every key step to ensure buy-in, we were able to sign a number of them up as founder members before the official launch.

### Agree ground rules without reinventing the wheel

Community foundations often run '100 clubs' which share many of the characteristics of successful collective giving groups. Following focus group discussions, we agreed that the 'Norfolk 100' model of monthly pooled contributions would be good to follow but with a lower monthly commitment of £25 to meet our goal of attracting newer and younger donors. It would also be feasible to follow other models that host events at which charities pitch to donors who have not committed to regular attendance or a set donation amount. Whatever model is chosen, you are likely to benefit by making use of social media to spread the word about membership and forthcoming events as well as by making links with charities looking for funds and other kinds of help that giving circle members may be qualified and willing to provide for free, such as legal advice or marketing skills.

### Agree a project timeline

Unless you establish a timeline projects can, and usually do, slip. Even with a timeline in place, there will often be slippage due to unexpected external factors so be sure to build in a cushion of time to avoid being knocked off course by unpredictable events. It took nine months to launch the Norfolk Future Fund. We began with a focus group to get input from potential members, then created and followed a project plan which covered everything from choosing a name to marketing the idea through a brochure, PR work and a launch event.

### What happens at the launch event?

We decided to demonstrate how the circle works by showing it in action – the audience were given £100 to allocate to charities of their choice. This was a huge success and some members/attendees made additional personal pledges to the community groups presenting that night from their own pocket, which increased the amount awarded by a further £3,000.

### What happens at a giving circle event?

It depends on the format you choose, but we have a committee drawn from giving circle members, who select the charities that will make presentations at the event. The charity representatives are coached to ensure they make best use of the 5-10 minutes they have in front of members. Members can ask questions after which the charities leave the room and the members decide how much to allocate to each cause. This can become heated so it is important to have a good chair, ideally someone who is known to most members and commands their respect.

### What are the benefits of giving circles for members and community foundations?

Our experience shows that giving circles bring a range of benefits to both members and the community foundation that helps to set up and host the circle. Five key benefits are:

- The power of combined contributions – by giving less than £1 a day our members can collectively direct the distribution of an annual fund worth £30,000, which is likely to be a much bigger sum than they would ever be able to amass alone.
- Bigger impact – members decide what to support but can draw on the community foundation's signature expertise in knowing the best local causes to ensure their pooled funds achieve maximum impact.
- Opportunities for engagement that fit donors' lifestyles and personal objectives – whilst members commit to a monthly cash contribution, they can attend and participate in giving decision as little or as much as they like. Direct engagement with causes seeking funds creates opportunity for 'hands-on' engagement by volunteering or offering pro bono help that draws on members' professional skills.
- Personal and social benefits – joining a giving circle offers donors the added benefit of networking with like-minded individuals at the same time as supporting their local community.
- Breaking down the barriers between donors and recipients – meeting the people who lead, work in and benefit from charities seeking support from the giving circle, helps donors to increase their engagement with the local community.

### What can you hope to achieve by setting up a giving circle?

We successfully launched the 'Norfolk Future Fund' on 3 July 2014. As at August 2014 it has 23 members, so within a month of the official launch, we are a quarter of the way towards our annual target. The Fund has been well received and has an enthusiastic membership group, many of whom were able to be involved pre-launch to help make key decisions such as selecting the name of the circle and developing the branding. We will continue engaging with those who were interested but could not attend the launch event, and we will continue identifying further potential members as part of our ongoing development work.



### In a nutshell...

- Set clear objectives – why would it be beneficial to the future of the foundation?
- Agree a strategy to meet your objectives – for example, to appeal to a wider audience or different demographic (perhaps to involve more women in philanthropy).
- Conduct research – to identify potential members and to develop the offering with the input of members who reflect the target audience.
- Plan thoroughly – establish a clear plan to include milestones, marketing and communications.
- Establish a project team – keep your focus group and/or project team involved to ensure the initiative stays on track and seek wider input from staff and trustees.
- Maintain momentum – keep the momentum going to support the group, particularly in the early days to keep members engaged and ensure they spread the word.
- Involve members – support them in offering opportunities to shape the path that the giving circle takes so they feel ownership of it.







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# Chapter 5

# Meet the Fellows

Kate and Toby Anstruther

Sam Evans

Daniel Gill

Kate and Thomas Hill

Carrie-Ann Huelin

Fiona Humphrey

Professor Sir Laurence Martin DL

Lesley Martin-Wright, DL

Helen McArdle

Jane Moss

Sue and John Phipps

Marta Rodriguez

Judy Russell

Susan and Pat Russell

John Skelton and Francesca Skelton DL

Marion Stevenson DL

Catherine Stewart

Tom Ward

Jane and Peter Wilson

Nikhath and Jesse Zigmund



# 5

## Meet the Fellows

### OVERVIEW

In this section we meet some of the people who constitute The Philanthropy Fellowship in all its glorious diversity. The 20 individuals and couples who have agreed to share their stories are fewer than a tenth of the people who have decided to work with their local community foundation to take their charitable giving to the next level as Philanthropy Fellows.

Just one glance at the faces on the following pages tells a story about British philanthropy that is at odds with the classic stereotype of the 'bewhiskered do-gooder' of the popular imagination. For many people, the word 'philanthropist' brings to mind an image of an older, white, wealthy man. Yet the Fellows do not fit this stereotype at all – they include younger and older people from many backgrounds, with a fairly even split of women and men, as well as many couples who enjoy conducting their charitable giving together. All have enough resources to be able to give some away, but they are not all *über*-wealthy or members of the fabled '1%', out of touch with the realities of modern times. Indeed, it is often Fellows' experiences of the sharp end of life – whether through personal tragedy such as bereavement, or awareness of the needs that exist in their locality – that originally motivated, or gave fresh impetus to, their philanthropy.

All the people profiled in this section fit the dictionary definition of 'philanthropist' (love of mankind). 'Philanthropy' also has a simple meaning of 'practical benevolence', and includes not only the giving of money, but also the giving of time, expertise, knowledge, contacts and any other assets that promote the public good.

Yet from the start of the programme, it became clear that the words 'philanthropy' and 'philanthropist' posed a barrier for some of those it was designed to reach. A number of people who were keen to participate in the Fellowship were deterred by the use of terms they viewed as off-putting because they appeared 'too grand' or too laden with negative connotations.

But others are keen to help 'reclaim' or 'rehabilitate' the words, believing that the label 'philanthropist' ought to be seen as a compliment and an aspirational identity, rather than a term that is viewed as, at best, anachronistic, and at worst a euphemism for egotistical and self-promoting behaviour.

Indeed, a curious situation exists in British society that we might call 'the philanthropy paradox'. The paradox is that, generally speaking philanthropically-funded organisations are well thought of, but philanthropists are often not. This creates an illogical situation where charities are admired, whilst those who provide the financial resources that enable charities to do their work are not viewed in an equally positive light.

The existence of this paradox can make the task of fundraising, and fund development, even harder than it needs to be, because the fear of public criticism can become a genuine barrier to giving.

One approach to tackling this paradox is to normalise philanthropy by reminding people that a majority of the population makes charitable donations in any given month<sup>1</sup>. Whilst much giving in the UK remains reactive and spontaneous, typified by putting coins into a collecting tin, it is important to also show that a wide variety of people have chosen to become more proactive and thoughtful givers.

The 20 profiles in this section demonstrate the variety of people who have made the decision to take their charitable giving more seriously by joining The Philanthropy Fellowship. With the support of staff in their local community foundation, they have taken time to reflect on what they care about and developed a plan for using their resources to achieve change to benefit their local community. They have had the chance to engage more deeply with beneficiaries by visiting projects in action, some for extended periods including overnight trips. They may also have attended talks by speakers including charity leaders, other philanthropists and academics. And they have enjoyed many opportunities to socialise and network at events ranging from intimate drinks in the home of a fellow donor to large-scale events at breathtaking locations.

Many Fellows were already giving through their community foundation before The Philanthropy Fellowship began in 2012, but all attest to the benefits they have gained from becoming part of this programme. Most are individuals giving away their personal resources, but a few became involved through the company they work for. Whatever their route into the Fellowship, and however they chose to engage with what was on offer, its impact on their awareness of need in the local community, and their understanding of how best they can respond to that need, is evident in the following pages.

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<sup>1</sup> As demonstrated in every edition of the UK Giving survey, which shows that somewhere between 52-58% of people have made a charitable donation in the preceding four weeks.



## Kate and Toby Anstruther

Toby and Kate Anstruther moved with their two children from London to the East Neuk of Fife in 2008 to run the Balcaskie Estate, which has been in Toby's family for centuries.

“[It has] prompted us to develop a more complex understanding of the issues and the range of opportunities”

*“For us, philanthropy is nothing more than participation within your community – or in relation to a cause you’re involved with – without the expectation of a personal return. We suspect that the desire to do right by your community (whether geographic or cause-defined) is in all of us but it is often crowded out by the demands of everyday life and the lack of spare capacity. We have always contributed in a small way to what we have individually felt were ‘good causes’ but our move to the East Neuk of Fife gave us an opportunity – and more time – to consider a more strategic approach to our engagement.*

*In our case, our move to a traditional rural estate – and Toby’s background in real property – nudged us towards a place-based focus. We decided to establish a fund with our community foundation, to support our local area. As recent residents, we were keen to understand the local communities and consider how best we might participate in them. Our first step was to commission a community profile from Foundation Scotland, researching the area, its needs and assets.*

*We both grew up in families where philanthropy was part of life – there were always examples of people being helped. As a child, Toby remembers sharing the family home with a succession of people in need of somewhere to stay or a helping hand – including foreign refugees from the Prague Spring and the Basque separatists. We have both been lucky in life. It seems completely natural to use the opportunities that luck has brought to help us participate in our communities.*

*We’ve also been conscious of how, since our youth, the dominant focus of our economy and society has come to be on the growth of things that can be measured, usually in financial terms. But we agree with people like Harvard professor, Michael Sandel, that there are limits to the application of market thinking and some realms that shouldn’t be reduced to questions of financial value. As well as influencing our general outlook on society, this relates to our view that philanthropy isn’t simply about being able to give money.*

*Foundation Scotland – and The Philanthropy Fellowship – have been of considerable help. When we started to consider how we might contribute (beyond a scatter-gun membership of some national third sector organisations) we needed the benefit of the community foundation’s experience in considering our approach. The initial community profile that we commissioned provided a basic, objective context about our area and the opportunity to consider how best to contribute. Subsequent discussions with experienced members of the Foundation and a Philanthropy Fellowship study tour to visit a number of community enterprises on the Isle of Mull have prompted us to develop a more complex understanding of the issues and the range of opportunities.*

*Sharing experience is extremely valuable – in philanthropy as much as any field, so meeting other donors has been beneficial. The Fellowship has also facilitated other connections. For example, Toby attended a social investment conference which led to a fruitful meeting with a Scottish Government contact interested in rural regeneration.*

*Taking time to learn about the sector and our various communities has been very important for us. No-one would expect someone with no experience of the business world to just move into some field of commerce and start making good decisions without training or research. It surprises us that sometimes people seem to assume that moving from business to the third sector doesn’t require a similar learning process. In any field, if you’re aiming to invest to make an impact, it seems irresponsible not to do some research first to ensure that you are genuinely going to create value and that your actions – however well intentioned – aren’t going to have unintended negative consequences.*

*Selecting causes and organisations to support is one challenge. There is a never-ending stream of good causes to support within the communities in which we participate. Working with the community foundation gives us confidence that the organisations we support financially really do pass muster. But it is all too easy to consider that giving money alone is the answer. The key issue for communities is not cash but participation. For us, making a difference has to mean getting our hands dirty. You might still be termed a philanthropist just for writing a cheque, but it is far less effective than getting involved as a volunteer too. And – despite all the gratitude that comes from sending a cheque – we recognise that the critical contribution in any local initiative is the one made by the people giving their time and energy to make it happen.*

*The most rewarding projects have been ones where the project has brought out the energy and engagement of its members with long-lasting benefits. An example is the St Ayles Rowing Club whose Coastal Rowing project has, in just a few years, stimulated the development of a network of coastal rowing clubs and regattas around Scotland, using skiffs built to the design pioneered by the St Ayles club as part of this project. We played a very, very small part in that project and can really claim little credit for it, but we are proud to have been able to help.*

*We are very, very cautious of the categorisation of our actions as philanthropy. We contribute to our communities – often less than many other members of them – and, alongside our fellow East Neuk Estates members, being active members of a vibrant community is an extremely rewarding experience. Our own financial context means that we have the opportunity to devote time to some of the community or philanthropic projects in which we are involved. Doing our bit to ensure society is alive and kicking is important.”*



## Sam Evans

Sam is a Corporate Social Responsibility (CSR) adviser for Hill Dickinson LLP. He worked with the firm for a number of years in an accounting role but was given what he describes as his 'dream job' in 2013.

*"I had just taken on this role, which involves guiding my firm's corporate philanthropy strategy, when I learnt about The Philanthropy Fellowship and it was something I immediately wanted to get involved with.*

*I guess my interest in philanthropy started around eight years ago when I did some volunteering at work. Seeing what could be achieved by a few like-minded, good-hearted people was awe-inspiring so I immediately joined my company's charity team.*

*I've always been surrounded by generous and caring family and friends but through my CSR role, I'm lucky to meet the real unsung heroes of the community. They are my real motivation, seeing the often invisible work that goes on in our community every day is truly inspiring*

*Philanthropy is part of my world but since being involved with The Philanthropy Fellowship it's become a part of who I am.*

*At the risk of sounding idealistic, I want to 'make my city a better place to live' and, through the power of The Philanthropy Fellowship, I feel I have a real chance to do that. Oh, and I also want to change the image the word 'philanthropist' brings to mind.*

*The simple advice I would offer to other donors is: get involved. Even if you think you've got very little to give, there is someone somewhere who will need it. Know about your community and what it needs but, at the same time, know your limitations. All giving is good but only the right giving carries on. There is strength in numbers – join The Philanthropy Fellowship or a similar movement to see how the combination of skills and resources makes philanthropic giving so much easier. And don't give up."*

*"Seeing what could be achieved by a few like-minded, good-hearted people was awe-inspiring"*

*The Philanthropy Fellowship has provided a wide range of benefits. It has offered good networking opportunities, it's brought a focus and stability to my philanthropic goals and participating in project visits and being out in the community has had a huge impact on my personal knowledge.*

*Advice and support has played a massive role; there is no such thing as a perfect philanthropist. It's a constantly changing environment and every person is capped by their own limitations. Having the support and advice from other Fellows is essential to making any permanent impact.*

*Staying focused on my philanthropic goals can be challenging. There are so many worthy causes out there that it is impossible not to want to help all of them but by spreading yourself too thinly, you'll dilute the impact you have.*

*I've had countless good experiences as a donor – building a sensory garden in St Vincent's visually impaired school, teaching a dyslexic adult to read and seeing Liverpool Homeless Football Team's positive interaction with corporate companies at the World Corporate Games are just a few of my favourites.*



## Daniel Gill

Daniel Gill is a successful businessman in Leeds who followed in his father's footsteps by setting up a business in the hospitality industry. In 1998 he established Dine and, over the years, has grown this into a very successful group of businesses.

Daniel was brought up in a household that believed in working hard and, at the same time, putting something back into the community in which you work and live. Working in the hospitality arena he met people from all sorts of backgrounds and realised that he was fortunate in having been able to take advantage of opportunities that so many other people couldn't benefit from. At university one of his modules was on social policy where he learnt about the impact of things such as the minimum wage and social welfare reforms and what effect they had on people's lives.

15 years ago he was asked by a friend to join the Leeds business branch of the Royal National Lifeboat Institution (RNLI). He is now the Vice-President and explains: *"I didn't join the committee because I was passionate about the RNLI but because someone I knew – and admired – asked me to. I realised that I could actually make a difference and, whilst I couldn't actually crew the lifeboat myself, I could support people who could."*

His own personal philanthropy didn't really begin until his marriage to Helen. When discussing their wedding list they agreed that they had no need, or desire, for new crockery, cutlery and towels so, instead, they asked guests to make a donation to a Social Inclusion Trust that they had set up. They wanted to be able to make fairly modest donations to local causes where people wanted to achieve something positive, and just needed some support to get things off the ground. However, a busy life with a growing business and young family soon took over their lives and, for some years, they did nothing with the funds from the Trust because they were not quite sure what to do. As Daniel explains: *"having the intent to do something, and then actually being able to put this into practice in a meaningful way are two completely different things"*.

Daniel came into contact with the Leeds Community Foundation in 2009, but it was not until a few years later that the conversations really began when they became part of The Philanthropy Fellowship programme. A number of informal meetings and phone calls were held in which Daniel and Helen began to explore a number of areas of interest. They started by distributing the proceeds of their *"wedding trust"* and, since then, have gone on to make further donations as well as providing practical support.

Talking of his philanthropy journey with the Leeds Community Foundation, Daniel says: *"I always wanted to do something to help the local community but, with so many causes to choose from it somehow made the decision even harder. When we started talking with the Foundation, they helped us clarify our thoughts and we realised that their focus was aligned with our interests – about social inclusion, tackling local need and addressing the lack of opportunities that face too many people. They provide a really easy outlet for us to provide support in so many different ways, and if it's not something they do directly, they always know 'a man that can'. I think that just writing a cheque can be a lazy way of engaging whereas personal involvement and giving of our time and skills is also a great asset to share."*

Daniel and Helen really do embrace the concept of philanthropy in its broadest sense in that it is not just about money, vital though that is. As well as making personal donations, they have done some product-linked promotions by donating £1 for the sale of certain dishes off their menu, and the whole company did a fundraising event to celebrate their 15th birthday raising over £15,000 in the process. They have also been on group visits, presented to children at an inner city school and donated a whole range of kitchen equipment and appliances to a local homeless charity.

Meeting other like-minded people is a key attraction: *"Giving or investing in the local community is not always easy. It's not a topic you tend to talk about very much with friends and family and yet, with the community foundation, it's natural to do that, because that is what they are all about. The ability to meet with other people who, like you, want to put something back is refreshing and inspiring and we always come away from their events having learnt something new, and having met some really interesting people."*

*"Having the intent to do something, and then actually being able to put this into practice in a meaningful way are two completely different things"*





## Kate and Thomas Hill

Kate and Thomas Hill live with their young family in Suffolk, and had been keen to find an effective way of supporting local charitable causes. Under her maiden surname of Earle, Kate runs a successful interior design company, Todhunter Earle Interiors, and Thomas is a QC at Thirty Nine Essex Street.

As a QC, Thomas Hill is all too familiar with the complexities of society, as courts often see the end result of lives that have become complicated for a multitude of reasons. As a Suffolk-based family, Tom and Kate have been keen for some time to get involved with local giving through the Suffolk Community Foundation, both as a way of putting something positive back into the community they live in but also as a way of engaging their children with philanthropy.

When The Philanthropy Fellowship began in their area in 2012, this created an ideal opportunity to put their plans into action.

*"We have discussed various ways of increasing our local charitable impact, but we wanted to be sure that we could be involved in more ways than giving money,"* explains Kate, a renowned interior designer who works under her maiden name of Kate Earle.

*"I was very excited when the opportunity arose to be the Patron of the first Rosa Giving Circle in the UK, here in Suffolk. The giving circle is an outcome of the work funded at the community foundation through The Philanthropy Fellowship programme."*

*It was an example of like-minded people coming together to share, learn and make a difference to a subject they care about, in partnership with Suffolk Community Foundation who really know what they are talking about."*

The Rosa Giving Circle now has 22 members, and has started grant-making to local groups that are supporting local women and young girls in need, such as helping projects in Lowestoft and Felixstowe that are working with teenage mums. Kate adds, *"I am delighted to say that my young daughter asked to become a Rosa member in her own right, and my husband Tom has now joined the foundation's Suffolk 100 Club to help support the wider remit of the Suffolk Fund's community grant-making. As a family, we are delighted to be supporting the foundation and are speaking to many others about getting involved too."*

*"The giving circle is an outcome of the work funded at the community foundation through The Philanthropy Fellowship programme"*



## Carrie-Ann Huelin

Carrie-Ann Huelin is the Senior Regeneration and Community Adviser at Laing O'Rourke and is passionate about the people she works with. She has a real interest in philanthropy and is keen to learn more about giving locally as well as to national networks. She became involved in The Philanthropy Fellowship in 2014.

*"It took me a few years to realise that the work I was doing in my role for Laing O'Rourke had moved into the realms of being philanthropic. The role was never just a job to me; I took it really personally and felt deeply about the successes and failures when working with local people. I discovered a balance in what I achieved for local communities that met the needs of clients and their higher level strategies, but that also resulted in real stories of success for local people. I've now moved to a more senior role within the business but it's still these stories that stick in the minds of colleagues and partners. You don't get to be part of people's lives – helping them and supporting them – if working in business is just a job to you, it has to be a part of who you are. I've realised that that is where I am and I want others to be able to feel as proud of what they do.*

*I do sometimes have to miss Fellowship meetings or events because of business commitments and I'm always sad about that. The great thing is that there is never pressure from the group to attend everything because there is a consideration of everyone's circumstances.*

*I enjoy being able to tell people I'm part of The Philanthropy Fellowship in my region. I like explaining to people outside of the group what it involves, and I've benefited from hearing inspirational speakers that let you reflect and learn from what they say.*

*Being involved in the Fellowship has shown me that if you care about people and communities you can have common ground with people from any walk of life or industry. It has made me feel better about some of the things I'm trying to do.*

*“The Philanthropy Fellowship has shown me that I'm not alone. It has linked me to other people, organisations and sectors that I'd never have met and has shown me the impact that actions can have on all elements of a community”*

*Philanthropy brings many personal benefits – it feels great to help or support someone, and it can also provide opportunities to trail blaze new ideas we can use in the business.*

*The Philanthropy Fellowship has shown me that I'm not alone. It has linked me to other people, organisations and sectors that I'd never have met and has shown me the impact that actions can have on all elements of a community. The idea of a fellowship of philanthropists makes sense to me. It's crucial to have a network of support from peers and colleagues to bounce ideas around, share good practice and work through solutions to problems together. You can always learn from someone who knows more and share your knowledge with someone new.*

*I often experience a battle between what I want to do as an individual and what I have to do in my paid job. For instance, a client might have an interest in a project recruiting purely long-term unemployed people, with no scope for any other cohorts, and I have to put to one side my view about people I personally think would be good to include like young adults with special educational needs. Through the Fellowship I can see others with similar challenges so that makes me feel better.*

*For the future, I want my business to see the benefit of endowment funding and to understand the difference between strategy outputs and real outcomes for people. On a personal level, I would like to understand more about the differences between regions in terms of philanthropic work. Being based in the North of England means I know a fair amount about how we function here but sharing information across the national philanthropy networks is really interesting to me and will be unique to being part of the Fellowship.*

*I have learnt that there isn't a right or wrong way to be a donor if your heart and mind are in the right place. I've also learnt that what we do can have far greater impact than it appears at first sight. For example, helping a local person get a job is about more than them getting a wage – it makes them feel better about themselves, improves their health, reduces the need for Food Bank use, reduces the number of free school meals needed for their children... the list goes on. The Fellowship has helped me gain those sorts of insights.”*



## Fiona Humphrey

Originally from New Zealand, Fiona lived in West London for many years and recently relocated to New York as Director of US Regulatory Programmes for Deutsche Bank.

Growing up, Fiona's parents had a big influence on her awareness of need in the community and encouraged her to help others. *"Where I come from, people would just help each other out – my giving today is just an extension of that. I was brought up to share what I have. I know that other people have suffered in their lives and – through no fault of their own – haven't had the chances I've had. If I've been lucky enough to have enough, then I should share it."* With a busy career in finance, Fiona doesn't have as much time to give to help others as she would like, so she tries to help in other ways, primarily by making monetary donations.

Before encountering the community foundation, Fiona supported large international charities, particularly their disaster relief work, but since receiving individual support through The Philanthropy Fellowship she has developed an approach that she feels is better aligned with her philanthropic goals. Fiona now uses two criteria to select groups: those working on causes in which she has a personal interest, and those that allow her to get closely involved and better understand the issues creating the need. Her more recent giving has focused on addressing human trafficking, the environment, children and young people, carers and her local community. *"Being able to change one person's life, and being able to see that, is hugely powerful."*

Fiona joined The Philanthropy Fellowship to learn more and is starting to put a more refined strategy in place to guide her giving. This involves looking closely at charities' ways of working, supporting grassroots organisations, being hands-on with her giving, and working closely with charities so she can see the positive changes that she has helped to bring about. *"I want to give others the sort of chances that I received just through luck."*

When making gifts, Fiona likes to feel she is making a difference to someone in particular and The London Community Foundation has helped introduce her to a number of local groups where that is possible. When deciding where to give, Fiona looks at what the money will be used to accomplish. She prefers to give to organisations with a track record and will often research a group if it captures her interest. *"I try not to be too swayed by the emotional element – it's there and I think we all have a very human response to suffering, but it's also important to understand the impact of our giving through facts and figures. This is one of the things that I value having learnt through The Philanthropy Fellowship: it allowed me to step back and think through why I wanted to make a donation. As I did, I realised that sometimes the decision was more emotional and sometimes more intellectual. I've realised that there is room for both – in fact, having both is a key part of the balance I'm after. The Philanthropy Fellowship gave me the guidance to reflect and as a result my giving has become more meaningful. In the past, sometimes I've felt guilty about not doing enough, but now I feel more informed about what I hope to accomplish through my giving, whether that's a spontaneous interest or something I'm deeply committed to."*

Fiona is now also happy to fund charities' core costs: *"I think people believe that all of their donations will go directly to beneficiaries. But without paying at least some staff, you aren't likely to get the skills you need to really help people."*

In her experience, there is often a gap between the passionate volunteer who decides to do something and the collection of skills needed to run an effective organisation. Fiona points out that while many local groups start out with one committed, catalytic individual, in order to engage others you need to organise and manage so many things that business skills really help, as does the ability to communicate effectively to everyone about the impact of what they're doing. *"I like to give my time and also the funds to let others give their time to work I value. Effectively, whether I contribute my own time or make a donation, I can enable someone else to do more of the work they are really good at; it can get more done and it puts the right person in the right place."*

*"Being able to change one person's life, and being able to see that, is hugely powerful"*

*"I was really glad to join The Philanthropy Fellowship. Working with The London Community Foundation has made it easier to make a bigger difference because they are able to bring a community-wide perspective and to connect people who have different approaches. Sometimes it's easy to see the symptoms of the problems in a community. And when first one changes, and then another – even small things – you get a sense of momentum that encourages others to add their efforts. There are many ways to make a difference and there is room for everyone to make some kind of contribution. That's what a community is – people looking for their chance to influence things a little."*



## Professor Sir Laurence Martin DL

Professor Sir Laurence Martin, is former Vice-Chancellor of Newcastle University and Honorary Member of the city's Pen & Palette Club.

When Professor Sir Laurence Martin saw the club's plan to set up a fund at the Community Foundation for Tyne & Wear and Northumberland he contacted the Community Foundation to find out more.

As a result of those conversations, in 2014 Sir Laurence established the Lady Betty Martin Fund in memory of his wife. The endowment fund recognises Lady Betty's contribution to, and passion for, education and young people during her time living in Newcastle upon Tyne. The purpose of the fund is to support arts activities for children and young people in communities across the North East of England, with a particular focus on supporting talented individuals to develop their practice.

An experienced philanthropist with a wide range of interests, Professor Sir Laurence Martin says: *"Giving the money is the easy part, but if you want to underwrite a continuing programme of help to people, rather than just putting up a building or putting a seat in a park, you need an experienced and skilled organisation that only the very rich could afford. The community foundation provides exactly that help, ready made."*

*I have wanted to do something for young people and the arts in memory of my wife for a long time and through fortuitous events and my connection with the Pen & Palette Club I was able to find out about the community foundation. The thing that impressed me about the foundation was how it managed its very wide and varied work, and I hope that both the Pen & Palette Club Fund and the Lady Betty Martin Fund can really make a difference to the arts in our region."*

Professor Sir Laurence Martin spoke about his philanthropy to a gathering of supporters of the foundation, encouraging them to become Ambassadors who will inspire and engage new philanthropists.

*"Giving the money is the easy part, but if you want to underwrite a continuing programme of help to people, rather than just putting up a building or putting a seat in a park, you need an experienced and skilled organisation that only the very rich could afford. The community foundation provides exactly that help, ready made"*



## Lesley Martin-Wright, DL

Lesley Martin-Wright is the Chief Executive at Knowsley Chamber of Commerce and has lived in Liverpool for 25 years. With an extensive knowledge and a wealth of life experience, Lesley is also fully utilising resources at the community foundation to enhance her philanthropy.

She became involved with The Philanthropy Fellowship in 2014 and was named Philanthropist of the Year at the Spirit of Merseyside Awards 2013.

*"I am driven to do more than my 'day job', and like to seek out philanthropic opportunities for my organisation and for me as an individual. Until I met a representative from the Community Foundation for Merseyside, my philanthropy (which is too grandiose a descriptor, the word I would prefer to use is 'giving') had been very ad hoc. I began to understand more about the underlying causes and inequality that exists in the city region. By receiving key messages that were easy to digest, my potential for giving and philanthropy became more of a reality.*

*I have to say that I feel incredibly lucky. I am blessed with a supportive family and network of friends. Therefore, what do I care about is 'family'; this is a central strand that runs through my life. For example I moved away from my native North East, lived and worked in the Far East (with a new culture and new career), moved to London where I worked for 10 years, and then to a new city to create a new life and future with no existing connections or friends. Raising two children and dealing with family illness and crises, such as aging parents, helped me understand how important team working is whether that's in the workplace or at home.*

*As a relatively 'new start' in The Philanthropy Fellowship I have already begun to understand a little more about the different drivers of those involved but equally the shared purpose of the Fellowship. Benefits of becoming a Fellow also include a greater opportunity to understand the thematic strands to some of the charitable projects, the flexibility offered to suit individual aims and objectives and the option of viewing projects. One of the statements that I have remembered, and will take forward with me from now on, was made at a Philanthropy Fellowship event addressed by the Duke of Westminster; he cited the Biblical quote 'To those much is given, much is expected'. Listening and learning from those who have become involved in giving and philanthropy certainly spurs me on to do more. I also see a major benefit of working with like-minded people who share similar values.*

*I have learnt a lot, most notably the benefits of co-operating with like-minded others who are working towards the same outcomes. Engaging with the projects we fund has been another highlight. I now have a much better understanding of what they do, the challenges they face and the distance that they have travelled with the support we have provided.*

*Whilst some donors may wish to contribute at arm's length, I think my own experience of first-hand knowledge and feedback gives me a much better insight. In 2011 Knowsley Chamber of Commerce established a joint partnership with Knowsley Council, Knowsley CVS and the community foundation to create a new entity called the Knowsley Foundation. To date we have granted over £250,000 to Knowsley-based projects and interventions. We have created a Knowsley Social Value model, and through our work have engaged with Public Sector Commissioners to drive social value and social responsibility into public sector contracts. There has been innovation along the way too, emanating from the people around the table, who have vision and wish to 'do something different' with the resources available.*

*In the future I hope to maintain, sustain, and develop the Knowsley Foundation to achieve even more. I also wish to use my connections and contacts to work more closely with the private sector, to influence and persuade others to join in the Fellowship.*

*A good way to begin as a donor is to ask yourself: 'What do I really care about?'. From this starting point you should find out more about your underlying values and philosophies. Everyone is different, but by exploring relevant questions it should be possible to create a giving plan that suits your particular approach to life. If I was liaising with a company or organisation that wished to become a donor or more philanthropic, it would also be useful for them to be advised on social responsibility as a driver for business (from the point of view of employee engagement, customer base and winning more commercial success). Many of the large companies who have supply chains seek out like-minded suppliers who share common values, or can demonstrate how they 'put something back or into a community project'. I would also advise that an ideal starting point for a new donor is to have information, advice and guidance from a trusted source – The Philanthropy Fellowship is underpinned by that model."*

*"Listening and learning from those who have become involved in giving and philanthropy certainly spurs me on to do more"*





## Helen McArdle

Helen began her career as a philanthropist in 2007 when she sold her original care home business and decided this was the time to do some good with the proceeds.

As she wanted to know more about the options that were available to her, she conducted research both nationally and internationally to identify causes that met her desire to make a tangible impact in people's lives.

Her two early philanthropic decisions were to work with Build Africa and the Community Foundation Tyne & Wear and Northumberland. With the former, Helen visited Uganda and witnessed the significant school drop-out rate for teenage girls and decided to address this issue by donating the funds to build a school with proper toilet facilities. This meant the girls had a safe environment and came to school every day. This successful experience abroad prompted a desire to find out more about the problems and issues in her own backyard. Helen therefore asked the community foundation to find projects helping families and children in the North East; this choice of beneficiaries reflects her passion and understanding of the issues resulting from her lengthy experience running businesses in the care sector for both children and older people. Helen is proud that she built her business on a 'learning by doing' basis and establishing a 'circle of trust' around her and has applied the same techniques to her philanthropy. This is a good fit with the Community Foundation approach, which encourages donors to get started and begin learning by making some grants, and which provides a team of trusted philanthropy advisers to support each philanthropist on their journey.

Together with her daughter Rachel and long-time colleague Lynne, Helen visited and identified four organisations to support: Newcastle Women's Aid, the Acorns project for children and young people, North Tyneside Carers Centre and Children North East. Rather than offer one-off support, Helen made an initial commitment to provide funding for at least two years because she understands from her business experience that care for vulnerable people requires substantial and sustained investment. Since the original investments Helen has visited the organisations each year and made two further substantial donations to each.

In addition to financial support, Helen is now willing to provide strategic support. She realised the importance of giving more than money as a result of hearing Sir Peter Vardy speak about his philanthropy through The Philanthropy Fellowship. As she has learnt more about the work of the organisations she supports, Helen has developed an interest in the issue of domestic abuse and has come to understand that it affects people from all walks of life. She is now pondering whether a different style of provision for women escaping abuse is needed and how her business skills and philanthropic activity might combine to help achieve this new approach.

Leadership and encouraging others is important to Helen in business and in philanthropy. Whilst she claims that she is not a team player and has little time for committees, she is a team maker and relishes developing connections between people. She is proud to have instigated a project to encourage the giving of time and money by staff at Helen McArdle Care, to support projects in the communities in which the company's homes are located. Reflecting on what she has learnt so far about philanthropy, after seven years of working with the community foundation and as a result of the extra knowledge she received as part of The Philanthropy Fellowship programme, Helen says, *"It is important to me to absorb information, take advice and try things to see what happens. I let my conscience be my guide and follow through on commitments. Above all, I try to never stop thinking about how to improve things."*

*"It is important to me to absorb information, take advice and try things to see what happens. I let my conscience be my guide and follow through on commitments. Above all, I try to never stop thinking about how to improve things"*



## Jane Moss

Jane first became involved with Quartet Community Foundation (QCF) in 1992 when she made a contribution to her legal partnership's revenue fund. In 2005 she became a member of our Ambassadors group, and in 2008 she became a Trustee of the community foundation.

As a very engaged Trustee we invited her to become a Fellow as soon as The Philanthropy Fellowship launched in our region in 2012, this helped to ensure that our Board was fully involved in the programme right from the start.

Although Jane can't pinpoint the exact reasons behind how and why her philanthropy began, she says she has always felt a duty to give to the less fortunate in the communities in which she has lived.

Jane feels her philanthropy has developed as a result of being part of the Fellowship. Since working with us on the programme she feels that her philanthropy has evolved from being a rather transactional process *"which served a purpose by appeasing guilt and ticking a box that an appeal had been responded to"*, to now feeling far more involved and informed.

Jane now wants to fully understand the impact a donation will have on an organisation and the people in the community, and feels far more likely to keep in touch with the grantee so she can learn how the project has developed as a result of the funding. She also feels that this level of engagement is likely to result in her becoming more involved in the future.

Jane says that meeting other donors, particularly those outside the immediate geographic area in which she lives, visiting projects and learning about effective giving, have all been invaluable elements of being a Fellow. The workshops run as part of the programme have enabled her to hear others' ideas and she is keen to see the Fellowship develop so that more people can get involved.

For the future, Jane sees herself being better able to plan her philanthropy and sees structuring the amount of future giving as a challenge, although a pleasurable challenge. She strongly recommends the Fellowship to others who wish to enjoy their philanthropy more.

*“Meeting other donors, particularly those outside the immediate geographic area in which she lives, visiting projects and learning about effective giving, have all been invaluable elements of being a Fellow”*



## Sue and John Phipps

Sue and John had been aware of the work of community foundations for many years as they had both spent their professional lives in the charitable sector. Sue worked for The Richmond Fellowship and John has recently retired as a volunteer at Voluntary Action Swindon.

Sue and John Phipps contacted us in June 2012, during the first year of The Philanthropy Fellowship in our region. They had received a legacy following the death of Sue's brother, John Cowe, who had taken his own life after years of living with undiagnosed Asperger's syndrome. Sue wanted John's life to stand for something and felt that helping others with her brother's condition would be a good place to start.

Sue was aware of the community foundation because of her history of working in the voluntary sector and was initially looking for guidance on delivering the legacy in the best way possible. The extra investment received through The Philanthropy Fellowship meant we were able to undertake detailed discussions about the options available, as a result of which Sue decided to create a perpetual endowed fund in her late brother's name as a memorial to him. The aim of the fund is 'To support groups in Swindon and Wiltshire working in the area of advocacy and supported employment opportunities for people with Asperger's syndrome'.

Once the fund was established, the community foundation team worked with the Phipps to find suitable applicants for the fund and to support Sue who decided to become involved in the assessment and subsequent monitoring of the grants given.

Sue and her family are very pleased with their philanthropic progress so far, which has also had an impact on the community foundation because we decided that our grants team should attend training on '*Understanding Autism*', delivered by the National Autistic Society, to raise our awareness of the condition and to help us when we assess future applications for funding.

*“The extra investment received through The Philanthropy Fellowship meant we were able to undertake detailed discussions about the options available”*

As well as taking advantage of the community foundation's extensive local knowledge and philanthropy expertise, the Phipps were able to take advantage of the Community First Match funding which offered 50p for each £1 donated into an endowed fund. Sue wanted to use some of the legacy for immediate grant-making and after one-to-one meetings to work through the available permutations, she put £25,000 into a pot for immediate distribution and invested £120,500 in our endowment. This was matched by a further £62,250 from Community First leaving a £180,750 fund that will generate income for distribution in future years.



## Marta Rodriguez

Marta is originally from Spain and has been a Londoner for many years. She became engaged with The London Community Foundation in 2012 through her role as a trustee of her workplace's charitable foundation.

When they set up a Donor Advised Fund with the community foundation, Marta was responsible both for shaping the direction and goals of the Fund and for determining which projects would be supported. She joined the London Philanthropy Fellowship to learn more about London charities and local needs across the capital and says the experience has provided many insights and augmented both her professional and personal interests:

*"As a result of the London Philanthropy Fellowship, I'm better at recognising when multi-year funding or funding professional staff can help a charity with planning that can, in turn, help it be more effective in future."*

Marta is worried about increasing inequality in the world, and the effect this has on poverty and lack of opportunity for too many people. *"Every day on my walk to work I see homeless people and feel the urge to try to make a difference to people who aren't as privileged as I feel."* She prefers to support charities that provide education or access to opportunities for young people. *"Quality education is a way of levelling the playing field,"* she says, and she is also passionate about the environment.

To make a difference to the causes she chooses, Marta enjoys being involved at some depth, whether through using her professional skills in a trustee position, or by giving her time as well as money. She believes that more people should get involved in helping their local community, and through her involvement she hopes to inspire others. *"My giving has been influenced by my own experience, the circumstances of many Londoners, and what I see others doing to make a difference. I am inspired by ordinary people who are passionate and very motivated to give their time to help others."*

As a result of her involvement with The London Community Foundation, and the extra support she received through participating in The Philanthropy Fellowship, she is now involved in a number of initiatives, including the Inspiring Women campaign which aims to bring about a significant culture change: that girls – whatever school they attend, whatever their circumstances – get the chance to meet women from all backgrounds and gain first-hand insights into a variety of different jobs and the routes into them.

Marta is also the trustee of La Vida, a charity in Latin America that supports children and their families through education and health projects ([www.lavida.org.uk](http://www.lavida.org.uk)). In particular, she was able to learn more deeply about the charity's work by participating in the grant-making process – something she very much enjoyed. When wearing her trustee hat, Marta looks at the relative impact a donation can have, as well as understanding the direct impact it may have on people's lives.

*"With all my giving, whether personally or through that entrusted to me as a trustee,"* Marta says, *"I would like the satisfaction that I'm doing something to make the world a better place, where everyone has access to opportunities no matter what their background."* She concludes: *"I find it hopeful that more people are making public commitments to philanthropy."*

*"Every day on my walk to work  
I see homeless people and feel the  
urge to try to make a difference  
to people who aren't as privileged  
as I feel"*



## Judy Russell

Following a career which included time as a youth worker in London, Judy Russell now lives in Edinburgh and is an active volunteer with a range of charities.

*"My Philanthropy began in the mid-1990s when the business that had been run by our family for generations was sold to the employees. With the help of family lawyers I set up the Pump House Trust to give funds to support women, youth and the environment.*

*The key influences on my giving were my father and grandfather who always had a very philanthropic approach to the community where the business was based, demonstrating loyalty not just to employees but to their families, too. The pump house was the driving force and the heart of the mill, and that's why I chose the name for my Trust. My father also had a love of the land and an interest in its protection, which inspired my own desire to support environmental causes. I've also been influenced by friends and colleagues; I'm a member of a giving circle which meets a few times a year to share suggestions about causes to support and to collaborate on giving to maximise our impact.*

*"The Philanthropy Fellowship has helped me greatly to be more responsible with my giving and to discover groups that I would not otherwise have been able to reach"*

*Meeting other donors through The Philanthropy Fellowship has been brilliant and visiting projects is informative and helpful. Visiting a food bank in Alloa was especially interesting as it is not the kind of project I would have connected with otherwise through the usual appeals I receive. One project we visited – the Craggs Community Sports Centre in Edinburgh – was actually one I had funded through my Trust. It was great to be able to share what had inspired me about it with other Fellows.*

*Having made a connection with Foundation Scotland, I've become involved with its Women's Fund for Scotland. The Foundation has recommended women's projects that I would have been unable to find through any other channel. As a way of bringing people together to support women through grassroots groups across Scotland, the Women's Fund is a great asset to Scotland and to donors like myself. With the help of the team at the community foundation, I've been able to target some of my giving in a strategic way at improving the life of women whom I'd never have been able to reach otherwise.*

*One challenge I've faced as a donor is knowing how best to help organisations become sustainable. Frankly, one or two organisations that I've become particularly close to have sometimes relied on donors to fund them out of problems. Sometimes it's easier to write a cheque than to know how to best advise them to deal with a challenge or where to send them for support. Through getting involved on the board, I can learn more about how my support can be used most effectively, and the contacts I'm making through the Fellowship and my other volunteering are helpful, too.*

*My best experiences as a donor include just saying to great projects that I can fund them through my Trust. The Tinderbox Project comes to mind. It's a youth arts project in Edinburgh. I funded it once in 2012 for a special event and then when I met the person who runs it over a year later, I was able to say we can support them again. He was so thrilled and had not expected it! I also enjoy seeing the difference that youth projects make. The look on a young person's face when they achieve something they'd never believed they could do – I love it!*

*Philanthropy is very important in my life and Foundation Scotland has given support and flagged up projects to me and to the giving circle that I am a part of. Engaging with them and The Philanthropy Fellowship has helped me greatly to be more responsible with my giving and to discover groups that I would not otherwise have been able to reach.*

*I'm going to continue giving to environmental projects, and most especially youth projects. The Women's Fund has given me a way to work alongside others to support this cause that's very important to me. I've joined the advisory board of the Women's Fund and will be working with others to raise its profile and encourage others to get involved.*

*Giving is a wonderful opportunity to share and make a difference. Even a little to you as a donor can mean a huge amount to people and organisations that have no access to cash but great ideas and motivation. I think people sometimes think you need to donate tens of thousands to make a difference, but I've seen the difference even a few hundred pounds can make to a group that's run by volunteers but just needs some cash to pay the bills or buy some equipment. I'd encourage people to be brave and get out of their comfort zone. Giving is a way to connect to people and communities you might not otherwise encounter. It's enriching and gives you a different perspective."*





## Susan and Pat Russell

Susan and Pat Russell became committed donors of the Community Foundation for Calderdale in 2011. They thoroughly enjoy being hands-on with their Fund, helping groups with funding and practical support and enthusiastically telling audiences about their philanthropy at Foundation events. In 2014 they took advantage of the government's Community First endowment match programme to increase the size of their Fund to over £400,000.

*"Both our careers have been high pressure – the extensive travel and commitment meant high rewards and our long-term aim was to prepare for an early retirement to enjoy the fruits of our labours. Having achieved that aim we realised that we didn't want to relax too much and so we took up voluntary roles with charities where our skills were attractive and valuable to them and the stimulation of the work gave us what we needed to make life interesting.*

*We realised that we were fortunate in having more than enough savings and investments to provide a comfortable life for ourselves and felt that we should look at how we could donate in an effective way to charity. I had benefited from an assisted place at King Edward's School in Birmingham. This was thanks to someone making a donation and now I was in a position to return the favour in some way. By chance, in 2010 we met someone from Community Foundation for Calderdale, and very soon afterwards we decided that we should try to make a difference, and so we set up an endowment fund.*

*As we are both interested in the improvement and education of young adults to help them get on in life and increase their employability, that became the focus of our charitable giving. We are also keen to support adult literacy and numeracy and apprentice schemes for young and not so young people. Helping people to help themselves is how we see it.*

*The attraction of having a managed endowment fund was that we could decide what to support and have a measure of protection from direct requests and the community foundation was very helpful in discussing the sort of charities we might want to support. We can't say yes to everything and we do not want to be judged for what we do or not do. Saying no is a challenge made easier by the community foundation being our public face, and they help to identify those charities that fit our criteria. One of the other benefits is that the community foundation knows the local charities, and are able to facilitate us meeting them. We find it surprising that many donors don't visit their chosen charities and we have found most beneficiaries are very welcoming. Visiting the local charities and appreciating the work that they do is a vital part of our giving.*

*"The community foundation knows the local charities, and are able to facilitate us meeting them"*

*An endowment fund is a great vehicle, and it will last for ever, but initially even if you put in reasonably large sums, by its nature you only have a small amount of income to disburse in any one year. So, being impatient people, in addition we also make one-off donations – either to local charities that we come across, or to larger national charities such as the National Trust and the RNLI. It was refreshing to see that the large charities had a positive approach to developing their relationships with larger donors – as business people we understand the need for building relationships, and we have no qualms about being cultivated in this manner. The responses from these charities for the unsolicited donations meant that we had some unexpected invitations to visit and learn so much about what they all do and where exactly our money would be going. Who wouldn't want to have a tour of a lifeboat and meet some of the team, or go behind the scenes at a National Trust property! Indeed, we have enjoyed visits across England making mini holidays of some of them as well as finding out how local charities tick and what their challenges are. Many of those experiences are very special and enjoyable and we enjoy learning about everything we see.*

*Philanthropy can take over your life and another challenge is to keep a balance and enjoy our retirement at the same time. Visiting projects and meeting a wide range of people has been eye-opening and we will continue to support a variety of charitable causes that we believe do make a long-term difference. It's how we feel we get value for our investment in the charities we support. It is a great feeling to see people pass exams and start work. Making a difference for the better is fantastic, and you do not have to be a millionaire for philanthropy to be life enriching."*



## John Skelton and Francesca Skelton DL

John Skelton and Francesca Skelton DL, became committed donors of Milton Keynes Community Foundation in 1996 when Francesca became a Trustee of the community foundation and a member of the community foundation's Arts Panel.

*"We believe in investing in the community in which we live, and want to play our small part in helping it grow socially and culturally.*

*We believe in the values and vision of the community foundation and see voluntary organisations as agencies of change in our society. We like the wide-ranging remit of the community foundation as it assesses changing needs and priorities and works positively to understand and support local voluntary organisations.*

*We joined the Fellowship as we were interested in being part of the wider movement committed to philanthropy. As we all look ahead to the future, we believe there is strength in working together more actively in an extended but still local region, as well as coming together nationally as part of the UK Community Foundations' network. We have been inspired by speakers from voluntary groups and from donors who share ideas and experiences and broaden our perspective."*

As part of The Philanthropy Fellowship, Francesca and John have attended a number of smaller philanthropic evenings, including a supper hosted by the community foundation's President at his home, where the theme was 'Intergenerational Philanthropy'. Tom and Anna, the Skeltons' young adult son and daughter, attended along with other adult children of donors. A talk by the CEO of UK Community Foundations led to a discussion on encouraging parents to talk about their philanthropic giving with their children. Anna and Tom enjoyed meeting up with Jess, the daughter of another couple who have a fund with the community foundation, who also attended the supper. They remain in contact – the community foundation being their link.

The community foundation approached Francesca and John about creating a named endowed Acorn Fund, which they agreed to do, *"as we were keen to build a fund for the future – it was the right time, and we will build for the long term"*. Taking advantage of the Community First Match Challenge and making regular donations has enabled them to grow their family fund more quickly, making grants to projects that have a lasting effect on communities in Milton Keynes. It helps to support a wide range of projects benefiting the whole community including people with special needs and other disabilities, children and young people, older people and projects that develop the local artistic and cultural life.

As Francesca states, *"Together we can invest in a sector which is innovative, responsive to needs and makes such a significant impact. This is particularly important in Milton Keynes, a new and developing community."*

*"We believe in investing in the community in which we live, and want to play our small part in helping it grow socially and culturally"*



## Marion Stevenson DL

Marion Stevenson was originally a probation officer and has been a family mediator since 1989. She was Director of Oxfordshire Family Mediation from 2006–2011 and writes regularly on mediation topics in the Family Law Journal. In 2013, Marion founded and currently chairs Charity Mentors, a short-term strategic mentoring service for charities, which works closely with the Oxfordshire Community Foundation and is what led to her involvement with the Philanthropy Fellowship.

*"The CEO of Oxfordshire Community Foundation first told me about The Philanthropy Fellowship nearly three years ago. It seemed important to me to create a fellowship of people who are minded to give intelligently to charities in our area and that it was likely that the community foundation had the knowledge to be able to help this happen.*

*Because of this, when I was in the process of setting up the Future-Building Fund, I investigated the possibility of 'housing' this fund within the community foundation. This fund supports infrastructure projects for local charities that have an idea for extending reach and impact and increasing sustainability. With my husband, Tim, I decided to contribute a sum to this fund. I sought others of the same mind who were in a position to give and believed in the concept of 'investing' in good organisations in order to create a stronger platform for delivery.*

*It seemed to me that the rationale for our fund was exactly in line with the philosophy of the community foundation: to enable individual donors to find sensible ways to support excellent organisations. The Future-Building Fund founders were pleased when, having raised £420,000 for a pilot project, we were able to negotiate to house this fund within the community foundation and to benefit from their help and expertise in managing the grant process.*

*This seems to me to be a good example of a partnership between a group of 'philanthropists' – people who are willing and able to give – with an organisation who can provide the back-up and 'intelligence' to do this well. I believe, as well, that the backing of the community foundation has given confidence to our benefactors and that, as we hope to move forward to the next round, the professionalism of our process (supported by the community foundation) and the outcomes achieved by the charities will encourage further giving.*

*I believe that the marketing that the community foundation does about philanthropy (for example holding an excellent debate in the Oxford Students Union in 2014) is vital in encouraging confidence in the community foundation. It also helps to create an environment in which people get excited about giving and making a real difference to charitable enterprises. I have found that people are often looking for a way to do this – and The Philanthropy Fellowship approach supports them in their quest."*

*"It seemed important to me to create a fellowship of people who are minded to give intelligently to charities in our area"*



## Catherine Stewart

Catherine lives in Cambridge and was introduced to the Cambridgeshire Community Foundation following the loss of her husband in 2011. Catherine wished to commemorate her late husband, internet pioneer John Stewart, who died of prostate cancer, aged only 49.

*"I believe that I am not unusual in trying to make something positive come out of something very sad." As John was a keen sportsman, Catherine decided to reflect his interests by setting up 'The John Stewart Memorial Fund – Sport for All' to help those that are less fortunate or disabled to benefit from sport. She also supports Prostate Cancer "for the obvious reason that I would like to prevent others going through what John had to endure. If everyone helped someone, the world would indeed be a better place."*

The community foundation offered Catherine a ready-made structure, extensive support and helpful guidance on how to set up and manage a charitable fund in a simple straightforward way. She particularly appreciated the ability to start her philanthropic journey without the need to call on lawyers or to deal with complex paperwork! This meant she was able to concentrate her time and energy on working out how to grow the fund by encouraging others who knew John to contribute and get involved.

As a result of The Philanthropy Fellowship programme, the community foundation has been able to introduce Catherine to other like-minded donors and has facilitated visits to projects, some of which Catherine has gone on to support with a grant. *"I have learnt a great deal about the organisation and really love the ethos of community foundations,"* she says. The main challenge for Catherine as a donor was to accept that it is not possible to support every good cause. Reflecting on her growth as a philanthropist, she also notes that: *"It is easy to give – but not always easy to make a difference."*

One of Catherine's best experiences as a donor was meeting her first grant recipient in 2012 on a site visit organised as part of The Philanthropy Fellowship programme. The project provides bicycles for young adults with disabilities and Catherine's fund covered the cost of an adapted bike. Catherine was able to take one of her daughters to see the project in action, appreciating the opportunity to involve her family in philanthropic work.

*"It is easy to give – but not always easy to make a difference"*

When asked about her future philanthropic plans Catherine says she hopes *"to carry on fundraising and supporting groups of interest and to be an ambassador for the community foundation by promoting the benefits of setting up endowed funds"*. Her message for others is clear *"take your time to develop a plan, talk to others and meet some projects before you decide to give. I probably wasn't organised enough when I started out, but fortunately I was able to draw upon the support of staff at the community foundation and am now very happy with the direction my philanthropy is going in."*



## Tom Ward

Tom Ward spent the main part of his business career with Scottish & Newcastle plc, with various roles including finance, brewing and corporate strategy. He now has a number of non-executive appointments in both business and the voluntary sectors.

*"I've been involved with charities pretty much all my life, although I was more able to give time than money at first. For instance, I spent two years in Papua New Guinea as a volunteer with Voluntary Service Overseas (VSO) shortly after I qualified as a Chartered Accountant. I've always got a lot of satisfaction from volunteering and from taking part in fundraising events and challenges, and I've enjoyed the variety of experiences it's given me.*

*I was prompted to think seriously about philanthropy when some shares I'd acquired as part of a bonus scheme were suddenly converted into a significant amount of money. This forced me to think carefully about what I wanted to achieve with it, and I decided that I wanted to use some of it for philanthropy.*

*"I want to have a plan with a strategy for making a difference rather than just making ad hoc awards"*

*Having an interest in moral philosophy, I've always been influenced by Epicurus. Others have expanded on this theme, of course, but his idea that a successful life can't be judged by amassing material wealth, since there's always someone who will have more than you, strikes me as being very true. Instead, I subscribe to his view that what matters is learning to be satisfied with what you have and enjoying spending time with family and friends.*

*Beacon Fellow and charity leader, Sir Thomas Hughes-Hallet has been a personal inspiration. I heard him speak about the personal satisfaction to be derived from philanthropy around the time I found myself in a position to give more, and this dismissed any lingering doubt I may have had that taking philanthropy seriously was the right thing to do.*

*Being part of The Philanthropy Fellowship and my wider engagement with Foundation Scotland, of which I am chair, has helped me to approach my philanthropy with the same kind of rigour I apply to my business activities. Giving money away may be easy, but doing so effectively and to make a lasting impact is hard. I think of it like investing for profit –*

*you need to analyse the market, define your objectives, evaluate and identify opportunities. I'm not rushing into giving away large amounts at this point – I'm building up a fund at the Foundation whilst working out how best to take a position that will achieve long-term value. The Fellowship has created opportunities to learn about needs and to ask myself the right questions to help choose between competing demands and strategies.*

*A challenge for me has been the need to bring my family along with me, particularly my daughters. They need to understand why I'm giving this money away and I want them to be as enthusiastic about it as I am. No-one asks you as penetrating questions as your own children; they can challenge you like no-one else will, so I've got to be absolutely clear about why I'm making the decisions I am. They're all independent adults now, and I'd like them to develop the philanthropy habit, too.*

*My best experiences as a donor have been meeting people working in the organisations I've supported. Their dedication and commitment makes me feel humble. Charities don't tend to have redundant layers of bureaucracy, just people working more hours than they're being paid for to make a difference to the people they support. They express gratitude to me as a donor, but I often think I didn't have to work as hard to earn this money as you do when you're spending it!*

*Philanthropy – and the volunteering I do with other organisations – is a big part of my life now. My family have observed a change in me: Ten years ago they might have described me as a thrusting businessman, but now I take most pride in telling them about the things I'm involved in that make a social impact. I get huge satisfaction from what I'm doing and I want to encourage them to share in this, too.*

*I'm still learning about the areas I'd like to make a difference in, such as mental health, and building up my fund so that I can then distribute it according to a plan over, say five years. I want to have a plan with a strategy for making a difference rather than just making ad hoc awards. I don't intend to create an endowed fund that will outlive me; I want to get satisfaction from seeing the funds make a difference.*

*My advice to someone starting out is to think about it carefully, by all means, but don't find excuses to put it off. Be true to yourself – there are lots of options of how and what to give to, and it's important to do what's right for you if you're going to enjoy it. But once you start giving, I'd be astonished if you regretted it. I always say one type of person you'll never meet is an ex-philanthropist."*





## Jane and Peter Wilson

Peter Wilson was the founder of Routeco plc, a distributor of industrial automation and control products, based in Milton Keynes and owns AW James, a property company which he created. He and his wife Jane were amongst the first donors to contribute through their company Routeco soon after the MK Community Foundation was established in 1989, and subsequently created their family fund in 2009.

*"We think that it is important to understand that everything in life evolves from a beginning. Ours was created by the early days after the 2nd World War 'where most people had very little, other than spirit and hope'. We came to Newport Pagnell, which later became part of Milton Keynes, where we felt rewarded as a new family with the opportunity for hard work and endeavour. We enjoyed the growth and wealth created by the New Town and felt the need to give something back. By becoming one of the original members of the MK Community Foundation we found a conduit to support a concept, an idea that to date has become an outstanding success and tribute to those past Founders and Chairmen that had the foresight to envisage the future of our community.*

*As our company Routeco grew, we endeavoured to support the community foundation more. For us it proved successful and helpful in that we acknowledged that the community foundation was a strong body consolidated by elected and very professional people that would ensure a clean and transparent method of giving that we could trust.*

*The community foundation ensures that the funds available for distribution are available to the community of Milton Keynes. It accepts requests and as a body seeks to ensure that funds are distributed through a great variety and category of charities. We are very pleased that we have confidence and trust in a charity foundation that allows us to continue with our services and success in the business world.*

*We are very privileged and proud to have the honour of becoming Philanthropy Fellows but as such we feel the title itself will not make us change our ways or alter how we think. We believe that people are good, we believe that some people are less fortunate than others. We believe that life is short and that philanthropy is a way of sharing a part of our good fortune with the community and country that helped create it. The community foundation is about the future of Milton Keynes in that it welds the community and our working environment together. It is a major force in the city of Milton Keynes and we are glad to be part of it."*

*"We are very privileged and proud to have the honour of becoming Philanthropy Fellows"*



## Nikhath and Jesse Zigmund

A New York City native, Jesse has been living in central London since 2010. Nikhath (Nikki), was raised in London and moved back to the capital in 2012 after attending graduate school in the United States. Jesse and Nikki see huge disparities of wealth in London, and they strongly believe that they have a civic responsibility to give something back to their communities.

*“It was great to exchange ideas, and to be inspired and motivated by their experiences”*

*“People who have the means to do so should help others in London. And if you spend a bit of time looking for ways to contribute, it’s relatively easy to get involved.”*

Both give their time as well as money to support charities. When Nikki was studying for her MBA she researched social enterprises, which prompted her interest in philanthropy. After university she spent six months working with a charity in India, near where her family is originally from. *“Overall it was a positive experience, but it opened my eyes as to how long it actually takes for charities to effect real change.”* Concerned about unbridled consumerism and the wider impact this has on people in other parts of the world, she notes, *“We don’t seem to be examining the real cost of things. The Rana Plaza garment factory collapse in Bangladesh, which killed 1,129 people in 2013, really brought this home.”* Nikki is particularly interested in young people, women’s issues, and the challenges faced by immigrant communities, and she sees increasing access to education and skills as a big part of the solution.

Jesse has been volunteering with charities for over ten years and sees peer expectations as a valuable tool for getting more people to give time and money. At the law firm where he worked in New York, the partners would often write large cheques for charitable initiatives, and pro bono work was highly valued, encouraged and a big part of the culture. While in the US, he became a trustee at the HIV Law Project. *“It was challenging but great. I learned a lot about bureaucracy, but we managed to turn the organisation around and inspire the board to raise more money.”* Today, Jesse gives his time as a Kids Company mentor and a trustee of The London Community Foundation.

Jesse is also interested in education, and in the economics of growth and the environment, particularly with regard to the sustainable use and stewardship of natural resources. But he is most worried about increasing economic instability. *“With young people, it’s not just about education, it’s also about actual opportunities to contribute. Having too few good jobs is bound to disrupt the fabric of society.”*

Jesse and Nikki joined the London Philanthropy Fellowship to meet and learn from people who also want to make a difference. In particular, they’re keen to gain a greater understanding of the needs that charities in London are addressing now, and what charities see emerging as the needs of the future. Jesse notes, *“I have no doubt that the most useful solutions to these will come in large part from the charitable sector.”* They both see the impact of supporting educational opportunities, particularly supplementary programmes that can help level the playing field for under-served communities.

They are keen to establish a giving circle with their friends, to raise money now and to positively influence a group of people who should be in a position to give much more in the future. *“The idea is to get people in the habit of giving early in their careers so that later, when they’ve got less time but more money, they’ll be comfortable engaging in philanthropy,”* says Jesse. *“We have a great circle of friends, and over the last few years we’ve come together a couple of times socially to raise money for one charity or another. This was a natural next step.”* That said, developing a giving circle has been a learning experience and not without its challenges. Asked what advice they’d give to others, the couple offered, *“You need to start with like-minded people, a sense of community and a collective interest in making a change in the world. But one of the biggest challenges was trying to focus in on what that change should be. We explored setting up our own fund, but decided in the end to get started by raising money for the 500 for London Fund, which supports a number of local groups. Another thing we’re learning is how to communicate with purpose, both within and outside of the social group we started with. Face-to-face is vital and it’s a mistake to rely on email. Whether you’re raising funds or raising awareness, it’s important to talk to a lot of people. Think about your potential allies for getting the message out there – you’ll be surprised how the circles in your life overlap.”*

*In London you can’t get discouraged if people’s attentions are pulled in other directions – they will be – and never be afraid to simply ask for support. People will let you know if what you’re doing is right for them and they want to know more.*

*Getting encouraged is important, being reassured that it’s all a normal part of the process. Using The London Community Foundation as a sounding board was really helpful and as a result of The Philanthropy Fellowship they were also able to introduce us to someone who was setting up a giving circle in another area of London. That was really encouraging – you get a real sense that you’re not alone and that others are struggling in the same way to define what they’re trying to do and how they’re going to do it. It was great to exchange ideas, and to be inspired and motivated by their experiences.”*

Jesse concludes: *“I want to know that I’ve done something good, I want to see results. I feel privileged to be where I am now, but it’s all based on luck. I could have been born in poverty. Because I do feel fortunate, it’s really nice to give back.”*

# Conclusion

This report has described and documented The Philanthropy Fellowship programme, which was run by the UK Community Foundations and funded by the Esmée Fairbairn Foundation from 2012–2014. The three key achievements of the programme are:

- The creation of a network of over 200 'Philanthropy Fellows', who have had access to a stimulating programme of donor education and engagement activities and networking events, as well as one-to-one support to plan and revise their philanthropic strategies using a theory of change.
- The identification of a further 1,500 'friends' who have engaged in some way with the fellowship programme.
- The unlocking of over £25 million of new donations to benefit the local community.

The programme has also generated additional benefits within individual community foundations and across the UK Community Foundation network that should ensure a lasting legacy of this programme:

- Investment in staff recruitment and training, which has brought new talent into the community foundation network and up-skilled existing talent.
- Greater collaboration between neighbouring community foundations as a result of working as partners to deliver the programme in a geographic region.
- Increased understanding of the importance of philanthropy development by trustees of community foundations, and greater engagement by the Board in this central aspect of foundations' work.
- The development of a competency framework and training for all community foundation staff who give philanthropy advice, which will enable future improvements in the quality of donor advisory work.
- The establishment of new donor social networks, including the founding of a number of Giving Circles, as a new mechanism to attract and support donors interested in investing in their community.

Despite these many substantial achievements, the biggest legacy of the programme is arguably the integration of the ethos of The Philanthropy Fellowship into the core business of funded community foundations. This shift is well illustrated by a comment from a community foundation director, who says:

*"We have been incredibly successful in shifting the focus of our organisation from grant-making to philanthropy advice, and now start with the donor and what they want to do, rather than what we want them to do."*

Those community foundations that show the greatest indication of sustaining the work funded by this programme are those that always viewed it as integral to their ongoing donor development work and an opportunity to put into practice what lack of resources had prevented them doing previously, rather than as an 'add-on' that would cease once the funding ends.

## The Philanthropy Fellowship and best practice in the wider philanthropy sector

Research shows that having a 'culture of philanthropy' across the whole organisation is the key success factor behind fundraising and fund development. A 'culture of philanthropy' exists when:

*"Most people in the organisation (across positions) act as ambassadors and engage in relationship-building. Everyone promotes philanthropy and can articulate a case for giving. Fundraising is viewed and valued as a mission-aligned programme of the organisation. Organisational systems are established to support donors. The chief executive/director is committed and personally involved in fundraising."*

## Where has the new money come from?

The extra £25 million in donations has been achieved as a result of four outcomes from the programme:

- Donations from new donors who have been introduced to the community foundations as a result of Philanthropy Fellowship activities, such as events.
- Donations from existing donors who have been inspired to increase their giving, exemplified by a South West Fellow who said he had been feeling rather jaded and described the Fellowship as 're-energising'.
- Donations from existing donors that have been made sooner than otherwise planned, exemplified by a North East Fellow, who said:  
*"We were already going to give a big sum in the future – it was already written into our will – but that might have been 20 or 30 years down the road, and my wife and I thought, 'why not do it now?' because we became aware of how much need was out there."*
- Donations made by Fellows and friends to local charities and community groups as a result of being introduced to the organisation through a Fellowship activity, such as a site visit or through new and strengthened relationships with fellow donors who support that cause.

1 This definition is from: Jeanne Bell and Marla Cornelius (2013) *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising*. San Francisco, CA: CompassPoint Nonprofit Services and the Evelyn and Walter Haas, Jr. Fund

## Conclusion continued

Community foundations need to have a supportive board, senior volunteers and colleagues working across the organisation who are willing and able to help support efforts to attract and retain donors (or, in community foundation terms, people who can set up donor-advised funds). Encouraging board members to understand that attracting and working with individual donors is a core part of their role is key to ensuring a successful culture of philanthropy across the network. The programme has worked with board members, and this learning is shared in 'How to get the Board on board with philanthropy development' on pages 14-15.

The goals of the programme reflect wider contemporary debates about what philanthropy is for, and what constitutes 'good philanthropy'. Much of this debate is tied up in discussions of the 'new philanthropy', which highlights the changing demographic of major donors (for example being younger, more likely to be self-made and more cosmopolitan) and uses concepts more commonly found in the business world, such as targets, impact, key performance indicators and strategic planning. Evidence that the programme has affected the thinking of both community foundation staff and donors is reflected in this quote from a leader in the North West region:

*"We're not just giving advice on whether to give to X, Y or Z, but wide-ranging advice on different approaches to giving. We're educating donors on the needs that exist in their local area and how those needs could be met. When we do that, giving comes alive for them because they can see the impact of their giving."*

### Learning from experience

The programme has successfully tested the theory that investing more time and resources in philanthropy development work will strengthen local philanthropy. Three factors explain some variability in the progress of the nine regions involved in the programme:

Firstly, the nine regions had very different starting points. Some had a very warm pool of donors from which to recruit fellows, and more experienced staff able to put together and lead the Fellowship programme. Regions enjoying what could be called an 'accumulated advantage' got off to a quicker start in the first year of the programme than regions without such advantages. However, all regions made faster progress during years two and three because:

- It is easier to recruit people to join something once it is tangible.

- Having some existing fellows was helpful in reaching and recruiting their peers.
- Community foundation staff became more familiar and comfortable with the idea, activities and impact of the Fellowship.
- New tools were developed, such as the Vital Signs reports, that could be used to start and develop conversations with potential fellows.

Secondly, the nine regions also differed by the number of partners involved in the work, ranging from just one community foundation in the London and Scotland Fellowships, up to six partnering community foundations in the Yorkshire and East regions, and seven partners in the South West region. Whilst the extra burden and complexity involved in co-ordinating activity across numerous partners did slow progress in some areas, others turned the partnerships into an advantage, and view the resulting greater degree of co-operation and shared activities as an important positive outcome of the programme.

Thirdly, as this programme was purposefully innovative and flexible, inevitably some efforts have not succeeded as well as others. However, recognising and learning from those less successful experiences helped in developing better strategies as the programme progressed. An example of a specific learning identified in many areas was recognition that most Fellows were not willing or able to travel long distance to attend Fellowship events. Therefore, instead of organising a major event and expecting it to attract attendees from a large geographic area, refined strategies involved organising a larger number of smaller-scale, local events that required less travel time.

### The Legacy of the Fellowship

A key legacy of the programme lies in the shift that has occurred within the staff and trustees of participating community foundations, such that philanthropy development is now viewed more widely as the central task of the network.

An equally important legacy lies within the donor community and the increased capacities of over 200 Fellows and over 1,500 friends. The growth in their knowledge and skills and the changes in their behaviour have resulted in more strategic, committed, confident, vocal, influential and networked donors. At its best, The Philanthropy Fellowship programme has enabled participants to be taken on a journey from being transactional donors, concerned with moving money from one account to another, to transformational donors, concerned with using their resources to make change happen.

In addition, four further outcomes are likely to have a sustained positive impact:

- A stronger network of community foundations, as a result of increased collaboration between community foundations.
- Increased commitment to philanthropy development as a core role of community foundations, both across the staff team and across the board members.
- Greater dialogue between philanthropists, who have created and strengthened relationships through Fellowship activities.
- The generation of compelling stories of everyday British philanthropists. The Fellows whose stories appear in this report help us to reach a better understanding of the contemporary 'face of philanthropy' and will hopefully inspire others like them to give more, and to give more effectively, to their local community.

## Thank you

All involved in the Fellowship wish to end this report by recognising and thanking the trustees of the Esmée Fairbairn Foundation for their generous financial investment and ongoing faith in the role and importance of UK Community Foundations.

We hope the contents of this report justify their faith, and that our efforts to share the key learning of the programme will leverage greater value from their investment by enabling others within the network and beyond to benefit and enhance their efforts to encourage more, and more effective, philanthropy in Britain.

Finally, we also wish to thank the Fellows for sharing their stories, which illustrate the changing face of philanthropy in Britain and will hopefully inspire others to use some of their private resources to enhance the communities in which they live, in a mutually enriching experience of philanthropy and fellowship.

# Appendices

## Appendix 1: The 35 participating community foundations

Region	Partners
<b>East</b>	Norfolk Community Foundation Bedfordshire and Luton Community Foundation Cambridgeshire Community Foundation Essex Community Foundation Suffolk Community Foundation Hertfordshire Community Foundation
<b>London</b>	The London Community Foundation
<b>North East &amp; Cumbria</b>	Community Foundation Tyne & Wear and Northumberland County Durham Community Foundation Tees Valley Community Foundation Cumbria Community Foundation
<b>North West</b>	Community Foundations for Lancashire and Merseyside Cheshire Community Foundation
<b>Scotland</b>	Foundation Scotland
<b>South East</b>	Hampshire & Isle of Wight Community Foundation Kent Community Foundation Community Foundation for Surrey Sussex Community Foundation
<b>South West</b>	Cornwall Community Foundation Devon Community Foundation Dorset Community Foundation Gloucestershire Community Foundation Quartet Community Foundation Somerset Community Foundation Community Foundation for Wiltshire & Swindon
<b>Thames Valley</b>	Berkshire Community Foundation Buckinghamshire Community Foundation MK Community Foundation Oxfordshire Community Foundation
<b>Yorkshire</b>	Leeds Community Foundation Community Foundation for Calderdale South Yorkshire Community Foundation Two Ridings Community Foundation Community Foundation for Wakefield District



## Appendices continued

### Appendix 2: Example of a donor questionnaire

This questionnaire was developed by The London Community Foundation, based on other community foundations' work. The questions are designed to establish and focus the donor's giving objectives and help them to develop or refine a giving strategy.

The process begins by establishing what the donor wants to achieve – what causes they care about and how they might concentrate their giving, based on the needs in the community and the donor's interests.

Having established their objectives, the next step is to create a charitable giving strategy that clarifies the overall goals and objectives, the focus of giving, the types of recipients and the type of support to be provided.

#### Values, ethics, motivations in general

- Why do you want to give? What are your motivations for giving? Why have you decided to put money into philanthropy rather than spend it on yourself or your family?
- Who influenced you in your life?
- What early experiences have you had that you consider formative?
- Does religion, a faith background or other spiritual beliefs inform your giving? How?
- What types of charities have you supported in the past?
- What gifts have you found most personally rewarding?
- What worries you most about the world?
- What do you find promising or hopeful in the world?
- What kind of world do you want to see?
- What causes do you care about?
- How do you want to make a difference to a cause you care about? What can you do to make a difference?
- To what extent do you think that local communities need your help?

#### Current giving

- Do you already have a giving strategy in place? For example, do you have a set of 'rules' for making decisions about donations? Do you leave room for impulse or heart-led donations?
- When you're deciding what to give to or how much to give to a particular cause, what information do you base your decision on? What sources of information do you use?

- What sort of things do you take into account when making a decision to donate? e.g.
  - I'm interested in the cause
  - Details about the organisation – size, staff, location, reputation
  - Timing of the ask – I have money available
  - Knowledge of the organisation and its work
  - Effectiveness of the intervention being funded

#### Perceptions of the voluntary sector

- Have you ever had a bad giving experience?
- Have you ever had a good giving experience?
- How do you feel about funding core costs like salaries and administrative overheads?
- How do you feel about making multi-year grants?
- What is your opinion on government funding of charities?
- Do you have any preference on single-purpose organisations compared to multi-purpose organisations?
- How do you feel about single ethnicity or groups working with specific identity groups, such as Chinese Elders or Somali footballers?
- Do you have a view on whether there should be more charity mergers?
- Are you interested in scaling up or franchising an existing good model?
- Do you have a preference for different methods of funding charitable activities such as making grants, giving loans or enabling income from trading?
- How do you feel about the different ways charities communicate with donors, such as face-to-face on the street or doorstep, collections in public places such as shopping centres or being sent direct mail through the post?

#### What do you want to achieve with your giving?

- What would success in your giving look like?
- Do you want to involve your family or collaborate with friends or peers?
- How would you like to be remembered in terms of your charitable contribution?
- What would you like your lasting impact to be?





This report describes and documents The Philanthropy Fellowship programme, which was funded by the Esmée Fairbairn Foundation from 2012–2014, to encourage a stronger culture of philanthropy, whilst strengthening local communities. Its key achievements are:

- The creation of a network of over 200 'Philanthropy Fellows', who have had access to a stimulating programme of donor education and engagement activities and networking events, as well as one-to-one support to plan and revise their philanthropic strategies using a theory of change.
- The identification of more than 1,500 'friends' who have engaged in some way with the Fellowship programme.
- The unlocking of over £25 million of new donations to benefit local communities.

This report shares key learning from the programme so that others engaged in philanthropy development work can benefit and enhance their efforts to encourage more, and more effective, philanthropy. It also contains 20 inspiring profiles of fellows, which illustrate the changing face of philanthropy in Britain.

The report is edited by Dr Beth Breeze, Director of the Centre for Philanthropy at the University of Kent.



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