

## Current news from the world of philanthropy

The purpose of this newsletter is to help to foster a connective network between those who are interested in all aspects of exploring and promoting new ideas about philanthropy. It is published every two months and is distributed free via email to anyone who expresses an interest in this field. The current mailing list is almost 400. Recipients are drawn from a wide range of organisations including funders, academic institutions and researchers, umbrella bodies and associations, various independent initiatives and consultants. It is also available on the Philanthropy UK website.

*Philanthropy UK* exists to work with others to promote new philanthropy, particularly among higher earners and those with significant resources.

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## **1. Developments in existing organisations**

### **ARK APPOINTS DIRECTOR OF RESEARCH**

Toby Eccles has been appointed the first Director of Research of ARK, the charitable trust created by key players of the European Alternative Asset Management industry that aims to transform the lives of children who are victims of abuse, disability, illness and poverty.

Toby's appointment will enable ARK to research and evaluate projects and organisations in-house. He brings 10 years mainly commercial experience, including business development at Data Connection, a leading UK software engineering company, and Corporate Finance at UBS Warburg. He has also worked with a variety of start-up companies and voluntary organisations and is a non-executive director of an Internet business.

Teresa Albor, ARK's Managing Director commented "We are delighted to appoint Toby to this new role. He is ideally placed to develop our research, evaluation and monitoring processes to ensure our social investments deliver the greatest social return on investment possible."

To find out more about ARK and future ARK events visit their website or call 020 7227 0040.

[www.arkonline.org](http://www.arkonline.org)

## 1. Developments in existing organisations contd..

### **BIGINVEST RECEIVES CORNERSTONE FUNDING**

BIGinvest, the multi-million pound community finance loan fund being developed by The Big Issue, has received £1m cornerstone capital funding from Bank of Scotland's Community Banking.

BIGinvest, a UK wholesale fund for community finance, aims to regenerate and stimulate enterprise in some of the UK's most deprived areas through lending to community development finance institutions (CDFIs), which in turn on-lend to small businesses, social enterprises and community organisations. The fund will lend between £100,000 and £250,000 to organisations which cannot obtain finance from commercial providers and is due to make its first loans before the end of the year.

Bank of Scotland has made its £1m loan under the recently introduced Community Investment Tax Relief (CITR). This enables CDFIs to raise capital at very low or zero cost, while providing investors with tax relief equivalent to a pretax 8.3% return. BIGinvest is now seeking additional capital from commercial banks, private investors and charitable trusts, with the eventual aim of raising between £5 - £10 million through a mix of term loans, bonds, shares and grants.

“This is a very positive development,” commented BIGinvest chairman Nigel Kershaw. “We are very pleased that Bank of Scotland have decided to make the loan under CITR and are now looking forward to making our first loans. Together, The Big Issue and Bank of Scotland brands have tremendous strength in the social business sector. By working together to create this fund, we can create business-like solutions to social and financial exclusion and be a real force for change in people's lives all over the country.”

For more information about BIGinvest, please contact Leonie Hirst on 020 7526 3239

[www.biginvest.co.uk](http://www.biginvest.co.uk)

leonie@biginvest.co.uk

*Readers might also be interested in an article in The Guardian, 3<sup>rd</sup> November 2003, reporting on new links being forged between The Big Issue and large corporations.*

<http://media.guardian.co.uk/>

## 1. Developments in existing organisations contd...

### BRIDGES COMMUNITY VENTURES

*We have received the following update from Bridges Community Ventures:*

“It has now been a little more than a year since Bridges Community Ventures achieved our target to raise £40 million in venture capital funds.

Bridges Community Ventures is the UK’s first community development venture capital company, established to invest in businesses with high growth potential in the most under-invested parts of England.

In September 2002, Bridges Community Ventures raised £40 million worth of funds, £20m from the private sector and £20m in the form of matched investment from the Government. Bridges Community Ventures’ founders, Sir Ronald Cohen of Apax Partners, Tom Singh of New Look and 3i, invested in the funds as did a range of institutions including HSBC, Lloyds TSB Scotland, West Midlands Pension Fund, Doughty Hanson, Lehman Brothers, Reuters, Schroder Salomon Smith Barney, South Yorkshire Pensions Authority and The Royal Bank of Scotland Group Pension Fund.

Bridges Community Ventures seeks growth companies at the early and expansion stages, as well as management buy-outs and buy-ins. Its investment in a single business ranges from £150,000 to £2 million.

During the year we have invested in a total of 9 companies, which all meet our criteria of being located in and economically linked to an under-invested area. These include the following:

- TrusttheDJ, a DJ talent agency, which manages and books more than 30 DJs, hosts the official website of over 70 of the world’s leading DJs and has released more than 35 albums.
- Simply Energy, a start-up company, which provides a price comparison service for energy consumers. This impartial service is based on a price comparison engine, which has OFGEM-energywatch accreditation.
- Touch ‘n’ Glo, a company which has developed the “Intelliswitch”, a new range of intelligent lighting solutions which have touch control on, off and dimmer functions as well as applications as security lights.
- Eyebright, a start-up company, set to provide cataract surgery facilities to the NHS and private sector health care providers.
- Elixir, a design and development studio for video games. The company’s mission is to combine the best creativity with the greatest technology to deliver video games that are both commercially and critically successful.

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- The Office, a company that acquires freeholds and manages buildings in Bridges Community Ventures target areas. It also provides easy in, easy out managed offices to suit small businesses.
- Harlands Labels, a company that produces specialized high quality self adhesive labels for leading manufacturers in the toiletries, personal care and cosmetics, beverages and pharmaceuticals markets, serving brands like The Body Shop, Avon and Marks and Spencer.
- EB2 International, a company that develops unique products and services that optimize airlines' on line distribution channels.
- HS Atec Ltd, a company that distributes new spare parts for heavy goods vehicles and trailers.

At this stage it is still relatively early to know what the financial results will be but some interesting social impact is coming through. Simply Energy, one of our portfolio companies, is a good example of this:

Simply Energy was a start-up and decided to commit to locate in and hire people from our target areas as a result of our investment. 44% of employees taken on live in qualifying wards. In addition to these direct benefits to the local community, Simply Energy offers other social benefits. The company works through Affinity Partners, which offer price checks as an additional service when communicating with their customers. Simply Energy have already signed up a number of charities, including Mind, the mental health charity and Epilepsy Action, aiming to provide them with an opportunity to make money, as well as provide employment for local people in the area.

The Woodland Trust has recently signed up with Simply Energy as an affinity partner. By calling the Simply Energy Greenline, householders will not only get access to every major green tariff in the UK but also the chance to compare how green the products and suppliers are, meaning consumers can make an informed decision. Even though green energy is only available for electricity, Simply Energy will search for a cheaper gas supplier. A tree will be planted for every customer that switches to green energy which could make a huge difference to the environment.

We are delighted with our progress this year and are pleased to announce that we received the GP Capital Investor Allstars award for the New Venture Capital Fund of the Year in October. We are particularly excited to receive this award because we hope to blaze a trail for a whole new set of private equity funds that invest for a social purpose as well as a profit.”

[www.bridgesventures.com](http://www.bridgesventures.com)

## 1. Development in existing organisations contd..

### THE COMMONWEALTH EDUCATION FUND

*We are reporting on the Commonwealth Education Fund because we know that many donors are interested in education, and because of the leverage funding provided by the government.*

The Chancellor of the Exchequer, Gordon Brown, launched the Commonwealth Education Fund in June 2002 under the leadership of Sir Edward George, the former Governor of the Bank of England, and Sandy Leitch, Chief Executive, Zurich Financial Services, to mark the Queen's Golden Jubilee. The Fund aims to promote universal primary education within low income Commonwealth countries in South Asia and Sub-Saharan Africa by supporting the efforts of civil society organisations to influence their governments to deliver universal primary education by 2015.

The British government has pledged £10 million towards the fund and will match pound-for-pound everything subsequently raised by individuals and businesses up to a maximum of £10 million. Ultimately, the Commonwealth Education Fund could reach £30 million and it will act as a seed investment attracting even more resources into education.

Three globally prominent non-governmental organisations, with decades of experience in developing education work in the countries involved -- ActionAid, Oxfam and Save the Children – have come together in a working alliance. These agencies will collectively manage the Fund and provide support and guidance to CEF representatives at the country level.

The Commonwealth Education Fund provides an innovative approach to increasing access to primary education in the Commonwealth where 70 million children live with no access to school. The Fund encourages individual and corporate donors to support coalitions on education in each of the 17 target countries, which can work closely with wider national coalitions to research factors that exclude children from school, document innovative work to reach those children, work on budget monitoring and analysis and, jointly with civil society coalitions, influence national government policy to make free universal access to primary school education available for all.

The Commonwealth Education Fund welcomes individual and corporate donors and operates in Cameroon, Gambia, Ghana, Kenya, Lesotho, Malawi, Mozambique, Nigeria, Sierra Leone, Tanzania, Uganda, Zambia, Zimbabwe, Bangladesh, India, Pakistan, and Sri Lanka.

For more information on the Commonwealth Education Fund visit the website or contact Cecilia Calvo, Corporate Partnerships, Commonwealth Education Fund at [ccalvo@commonwealtheducationfund.org](mailto:ccalvo@commonwealtheducationfund.org) or 020 7561 7619.

[www.commonwealtheducationfund.org](http://www.commonwealtheducationfund.org)

## 1. Development in existing organisations contd..

### PILOTLIGHT

*We have received this report from Fiona Halton.*

**Pilotlighting** n. A pioneering process for brokering the donation of business and professional skills in a time-efficient, flexible and strategic way, designed to maximise the benefit to all parties and so help small charities survive and grow. (See also **moonlighting**, as in the act of working at a second job from which the worker derives benefit.)

We have been involved with Philanthropy UK since its first newsletter and have appreciated the exchange of information between its members. The landscape for venture philanthropy looks very exciting now and I feel we are in the right place at the right time with our Pilotlighting scheme where we broker the donation of business and professional skills to help small charities survive and grow.

Pilotlighting grew out of research amongst senior business people. We asked them to consider how they might get involved with charities, particularly in the light of what we knew venture philanthropy might offer. They were most attracted to skills giving but identified a series of barriers to this such as having little time available and not knowing where best to apply their efforts.

At the same time we researched the need for skills giving in 25 small charities. We found that over 67% of small charities would like free professional help but did not receive it. Further, of those that did receive such help only 4% found it effective. Clearly there was a major mismatch here that left both parties dissatisfied. So, we then went on to research best practice in skills giving to see how we could dramatically improve this disheartening mismatch of expectations.

Out of this came a process - 'Pilotlighting' - that would answer the needs of the two groups but with one further ingredient: Pilotlighting was to concentrate on in-depth, sustained skills giving to develop a charity's infrastructure.

We launched Pilotlighting in May as our sole focus. So far we have recruited over 40 Pilotlighters, all at director level. To date these Pilotlighters are giving their skills to 6 charities. All Pilotlighters donate funds to Pilotlight to enable us to manage their time.

At present our focus is on small innovative charities working with disadvantaged people in the London area which have the potential to develop, and whose way of working maybe replicable, but are frustrated in their growth by lack of infrastructure and sustainability.

Like everyone else we need to measure outcomes, so we are producing regular reports to measure the effect of Pilotlighting. We then feed these back to Pilotlighters so that they can both see the effects of donating their skills and time and apply what they have learnt to their workplace.

We would love to hear from those of you interested in Pilotlighting. Our website can be found at [www.pilotlight.org.uk](http://www.pilotlight.org.uk).

## 1. Development in existing organisations contd..

### THE FUNDING NETWORK

*We asked The Funding Network to report on what they have achieved since their first event last Spring...*

'We are enormously proud of what we have achieved since our first Funding Day in March 2002. We have raised over £350,000 for 63 different projects, all from individual donations to projects of between £100 and £1500.

We seek to provide a forum for people to give in a setting where they can support causes they already feel passionate about, and also learn about and give to exciting projects they may not have known existed. So far the public have responded with attendance varying between 35 and 50 at any given event. We recently had our 6<sup>th</sup> Funding Day and people were amazed at the variety and scope of the projects presenting: from refrigeration units for high altitude communities in China, to a film challenging ideas about career decisions that will go on the university 'milkround', to a journalist whose book makes up 50% of the prosecution case for the International Criminal Tribunal for Rwanda (the papers for which she has stored in her attic in London). In response to requests from members we piloted our first Funding Evening in September and we hope to run these in parallel to our Funding Days.

Some of these comments illustrate why what we're doing is powerful and different, and beneficial in more than just financial terms for the presenting organisations.

"I think the idea of re-engaging real people (donors) with real projects, is desperately needed, I think fundraising has become increasingly professionalised and remote, leading to a lack of trust and confidence between charities and donors. "

**Alastair Wilson, School for Social Entrepreneurs**

"The funding events offer an opportunity to stop awhile and engage with what giving is about. For me I get excited about bearing witness to so much potential for change. I get a simple buzz from being able to contribute a bit. I would be very happy to have 'philanthropic bon viveur' on my headstone."

**Greg Battle, TFN Member**

"It is such a tonic to be allowed to address people who are prepared to be open minded, engaged and enthusiastic. The grant makes an enormous difference to us, its financial importance being matched by the method by which it was given: there is a real social benefit from meeting people who actually want to support such initiatives. In short, the idea of TFN clearly works."

**Ed Baxter, Resonance FM**

We also have plans to start a TFN South West in conjunction with the Greater Bristol Foundation. The launch of this initiative is planned for March 2004.

To join our email list please contact [info@thefundingnetwork.org.uk](mailto:info@thefundingnetwork.org.uk).

[www.thefundingnetwork.org.uk](http://www.thefundingnetwork.org.uk).

## 1. Development in existing organisations contd..

### WINGS

**New network participants:** WINGS has been expanding the roll of network participants. Within the last few months, the following organizations have joined, bringing the new total to 100:

- [Allavida](#), UK
- [Association of Slovak Community Foundations](#), Slovak Republic (also known as Asociácia komunitných nadácií Slovenska, AKNS)
- [Global Philanthropy Forum](#), USA
- [Initiative Bürgerstiftungen](#), Germany (aka Community Foundations Initiative)

<http://www.wingsweb.org>

### CHARITY TECHNOLOGY TRUST

CTT has recently launched two new services for charities and a new interactive website at [www.ctt.org](http://www.ctt.org)

The new services from CTT focus on the reduction of time and costs of payments processing for charities whose funding is derived from many donations of amounts between £5 and £100 per transaction; and a new version of eRaffles for Hospices called eDraws - which manages the online operations of weekly lotteries.

As with all of CTT's products these have been researched for 9-12 months and are launched in direct response to a clear need and in partnership with a group of charities in each case. CTT believes that across all of its service areas - online lotteries, email, payments and IT advice - it provides the most focused and cost effective technology solutions for charities in the UK.

Visit the various sections on the new website to find out more...

[www.ctt.org](http://www.ctt.org)

## **2. New Initiatives**

### **LONDON BUSINESS SCHOOL BRINGS THE GLOBAL SOCIAL VENTURE COMPETITION TO THE U.K.**

Professional mentors needed to coach aspiring social entrepreneurs

The Global Social Venture Competition (GSVC) is the only global business plan competition that promotes the creation of social ventures. The competition evaluates business plans based on their combination of high financial and social returns on investment, and awards \$100,000 in prizes. This year, London Business School makes the competition truly global by hosting it in London.

In 1998-99, students at Haas School of Business at the University of California at Berkeley launched the competition. In 2000, the competition expanded its scope and reach by uniting with Columbia Business School and the Goldman Sachs Foundation, which gave a \$1.5 MM gift in support.

Last year, the competition attracted 95 business plan submissions from more than 40 business schools across the world. With London Business School's global connections, there will be significant growth in the number and global scope of entrants this year.

The mentoring programme is an integral part of GSVC. Professionals are needed to coach competition entrants through the process of developing their business plans. GSVC mentor contributions significantly influence how businesses learn to redefine profitability and success.

In the past, mentors have assisted teams with writing the business plan, calculating social return on investment, and presenting ideas to potential investors. Best efforts are made to match teams with mentors whose industry experience and skills compliment those of the team and its business plan. In addition to working with aspiring social entrepreneurs, mentors also have the opportunity to network with other professionals involved in the competition, including other mentors and judges.

Professionals in all fields who are interested in becoming GSVC mentors should email Astrid Vandershriek at [avanderschriek.mba2005@london.edu](mailto:avanderschriek.mba2005@london.edu)

More complete information about the competition and the mentor programme is available at [www.socialvc.net](http://www.socialvc.net).

## 2. New Initiatives contd...

### SKOLL FOUNDATION INVESTS IN CENTRE FOR SOCIAL CHANGE

*This is an extract from a report in The Society Guardian of 26<sup>th</sup> November 2003.*

‘Jeff Skoll, ranked by Fortune magazine as the fourth wealthiest person under 40 in the US, is former president of online auction site eBay and founder and chairman of the \$300m Skoll Foundation. Its \$7.5m (£4.4m) donation to the Said Business School will establish the first global academic establishment dedicated to the study and promotion of businesses that trade for social purpose.

Skoll, 38, says his philanthropy stems from what he regards as failure of conventional business and politics to tackle social ills. “There is a realization that traditional political or business approaches have not eliminated the problems of the world. We’re living in a fragile house of cards that could come down at any time.

“It’s fair to say that social entrepreneurship has been around a long time but there has been a huge groundswell in the last 10 years.

“This is not a US phenomenon,” he adds. “It is a global movement. That is why we wanted to anchor the programme outside the of the US to reinforce how social change is coming from all the corners of the world.”

The Skoll Centre will teach a one-year MBA programme in social entrepreneurship and undertake research.’

<http://society.guardian.co.uk/>

### 3. Research and Publications

#### ALLIANCE

*Alliance* focuses on the impact of tax incentives upon philanthropy in Australia

The December issue of *Alliance* includes an article by Elizabeth Cham, National Director, Philanthropy Australia analysing the impact of tax incentives upon the growth of philanthropy in Australia. The main focus of the December issue is governance and accountability, looking at the reasons behind the increasing pressure for improved NGO accountability, some of the new models of accountability that are emerging, and some of the ways in which the corporate and NGO sectors can learn from each other.

An article by Jaime Faustino and Barnett Baron argues that fundraising from individuals is likely to do more to improve NGO governance and accountability than legislation and self-regulation, while an interview with Paul Brest from the Hewlett Foundation looks at the question of failures and foundation accountability in general.

For further information, contact Anand Shukla, *Alliance* Business Development Manager

[www.allavida.org/alliance](http://www.allavida.org/alliance)

[anands@allavida.org](mailto:anands@allavida.org)

#### DAVID CARRINGTON

David Carrington was in Melbourne and Sydney in October as the 2003 Eloise Waislitz Fellow at the Asia-Pacific Centre for Philanthropy and Social Investment at Swinburne University in Melbourne. As well as participating in a various seminars and workshops, briefing meetings and conferences, he gave a formal lecture in both cities: "How Trusts and Foundations can be more than grant-makers": a copy is now on his web site at <http://www.davidcarrington.net/articles.php>

See also <http://www.swinburnephilanthropy.net/about.htm>

## 3. Research and Publications contd...

### THE GIVING CAMPAIGN

There are two new publications from The Giving Campaign:

#### **‘Charity Financial Products – A New Approach to Giving’.**

The report summarises the work undertaken by a group of key individuals from the financial and voluntary sector, examining the charity financial product marketplace in the UK and highlighting the benefits for charities. They include:

- Substantial volume of new income at low cost
- Encourages a more planned approach to charitable giving, allowing charities greater scope in long term planning
- Access to new donors
- Better understanding of donor’s financial circumstances
- Greater prominence of charity in consumer thinking about financial affairs

#### **‘Making Giving Go Further’**

This is a free new guide for fundraisers on tax-effective giving. *‘Making giving go further’* is a comprehensive tax-effective giving resource for fundraisers, explaining how each charitable giving method works and the associated tax reliefs available for charities, individual donors and businesses.

The book brings together all the work the Campaign has done to help charities of all sizes make the most of tax-effective giving, with sections on Gift Aid, Payroll Giving, Share Giving, legacies and giving to businesses. Written for charity fundraisers of all levels, it explains how all the reliefs work, what the benefits are for both charity and donor and tips on how to successfully market tax-effective giving.

To order these free reports or simply to find out more, please either visit the Giving Campaign website, or contact them on 020 7930 3154 or by e-mail at:

[admin@givingcampaign.org.uk](mailto:admin@givingcampaign.org.uk).

[www.givingcampaign.org.uk](http://www.givingcampaign.org.uk)

## 3. Research and Publications contd...

### INVESTING IN CHANGE: WALES FUNDERS FORUM RESEARCH

The purpose of the Investing in Change Project is both to understand the context of funding in Wales and further afield, and to help create a more coherent and consistent approach to funding. We know from existing empirical work that charitable foundations do not necessarily redistribute wealth equitably and that a broad range of political (local, grass roots, and individual) and political (national and international, public) issues influence the opportunities for funders to make a difference.

It can seem an impossible task for any funder to make a meaningful difference, especially if working in isolation, and successes are often not repeated as the rush to fund 'something new' or 'something innovative' overwhelms the evidence.

The Investing in Change research has focused on four key areas:

1. funding patterns in Wales;
2. the strategic environment of funding (characterised by the policies of statutory funders – especially important as funders tend to follow the lead of Government policy, even if unwittingly);
3. the underlying philosophy and values of funders (and their perceptions);
4. existing concepts, evidence, and theories in relation to funding.

The findings of the research were presented to a range of funders at a meeting on 20<sup>th</sup> October in London organised and hosted by the Lloyds TSB Foundation for England and Wales – as part of a series of workshops to explore feedback on the findings and ways forward. (Attendees included Calouste Gulbenkian Foundation, Esmée Fairbairn Foundation, Joseph Rowntree Charitable Trust, Joseph Rowntree Foundation, The Baring Foundation, Tudor Trust, Llankelly foundation, and SHINE.)

These initial findings noted the following points:

- in Wales the highest overall level of per capita funding from non-statutory bodies appears to be attracted by those local authorities with the lowest levels of deprivation overall;
- there does not appear to be a strategic environment for funding - all funding, in general, tends to follow Government ideology and this ideology is expressed via statutory policy - statutory policy at the local level is neither strategic nor coherent, and it is not geared towards meaningful change;
- in general, with some notable exceptions, funders do not have a good understanding of how to bring about meaningful change, and can be resistant to learning as indicated by the resistance to evaluation;
- theories relating to societal change are complex, as they should be, and have difficult concepts, as they should have. Not all funders understand these theories

contd...

and concepts and as such are vulnerable to 'hot ideas', and to being influenced by any party with slightly more knowledge;

- overall, funders of the 'voluntary sector' tend to lag behind current, and important, trends and developments while assuming they are leading the way (for example, key developments in evidence-based policy and understanding innovation);
- however, there are a small number of 'intelligent funders' who, by virtue of their vision and values, are able to avoid the 'high fashion' of funding and, at least anecdotally, and by logical and critical argument, make an important and meaningful contribution to improving society.

At the meeting the following key points were raised:

- there is a lack of clear drivers for funding - funding is often driven by applications;
- big capital grants can distort the figures;
- funders often get more applications from Scotland than from Wales and many funders present did not have a specific budget for Wales;
- funders are often reactive and do not proactively seek applications - this can exclude those with a lack of capacity;
- the importance of theory was raised - theories assist in finding solutions and it is important to develop a framework for learning;
- the link between language, identity and funding was raised as it is unclear if funding 'follows' language issues (a peculiar pattern emerges in the funding data that seems to indicate that National identity i.e. being Welsh, and speaking Welsh, empowers communities to attract funding - however, this may also be a proxy measure for the strength of the community and further work is needed);
- it is important to find out what other barriers there are when applying for funding in Wales;
- funding in Wales is issue-based rather than geographically-based.

There are three important next steps for this work:

1. to expand the audience for the findings of the research project - further dissemination workshops and presentations are being prepared in relation to this;
2. to synthesise all the emerging findings into a coherent whole with a small number of key messages and recommendations - planned for the second quarter of 2004;
3. to begin to engage funders in a program of change, and improvement, and to this end strategic partners are being sought, particularly with a few to developing and progressing the 'intelligent funder' model.

Further details can be obtained from Dr William J Fear, Director, Wales Funders Forum, 12 Cathedral Road, Cardiff CF11 9LJ, telephone 029 2023 6900 and email: [bill.fear@walesfunders.org.uk](mailto:bill.fear@walesfunders.org.uk)

### 3. Research and Publications continued...

#### WINGS

##### Promoting Philanthropy through “Giving Circles”

Individual donors coming together to pool their funds and to make grants – that is the idea behind giving circles. Emerging as a new trend in the United States, giving circles are typically organized around a particular issue or area of interest and are considered a high engagement form of philanthropy. The circle’s grantmaking functions, proposal review, and site visits engage members in a participatory process that, when combined with the increased impact of pooled charitable resources, has strong appeal to many donors. The Baltimore Giving Project, housed at the Association of Baltimore Area Grantmakers (USA), has supported the growth of many giving circles since 2000 and just released its report *Growing Philanthropy through Giving Circles: Lessons Learned from Start-up to Grantmaking*, which details the growth and lessons learned from two of these circles. The report is available for download at [www.abagmd.org](http://www.abagmd.org) and in the [WINGS-CF Compendium of Resources](#). Print copies are available upon request by contacting ABAG at +1 (410) 727-1205 or [bgp@abagmd.org](mailto:bgp@abagmd.org)

WINGS has also published two volumes of **case studies of organisations from the WINGS network**. Volume 1 covers seven grantmaker associations on five continents, with variety in the location and nature of the organisations, their stages of development and the contexts of their work. Volume 2 focuses on community foundation support and covers eight organisations. Additional essays are by Jayne Millar Wood, first director of WINGS, Barry Gaberman of the Ford Foundation, WINGS’ Chair Emeritus, and UK researcher Diana Leat.

The studies offer information and guidance for emerging and existing organisations on organisation, management, governance, sustainability and member services, and we hope they make a contribution to the development of philanthropy worldwide. Please help spread the word. The publications are available online at <http://www.wingsweb.org/programs/casestudies/>, while hard copies can be obtained at WINGS.

[www.wingsweb.org](http://www.wingsweb.org)

### **3. Research and Publications continued..**

#### **THE TRADE BRIEFING**

In 2002 Comic Relief commissioned a report on fair trade, ethical business practice and global terms of trade. It covers key organisations involved in this area, describes the then current position and looks at what Comic Relief is doing to address these matters. This report, written by Ceri Johnson, former Project Assistant with Philanthropy UK, was prepared as an internal document for Comic Relief, but they have generously agreed to supply copies to people who might be interested.

Please contact Anne-Marie Draycott on [a.draycott@comicrelief.org.uk](mailto:a.draycott@comicrelief.org.uk)

## 4. Notice of Meetings, Events and Training

### THE FUNDING NETWORK

The next TFN funding day will be held at the RIBA on Saturday March 13th, starting at 10 for 10.30am. Representatives from trusts and foundations who would like to hear about, and meet personal representatives of, some interesting social change projects which may have slipped under their own radar, are welcome to attend, as are any individuals who support social change in the UK and overseas. For an invitation, e-mail [info@thefundingnetwork.org.uk](mailto:info@thefundingnetwork.org.uk) or telephone 020 7586 1442. TFN's website gives details of the organisation and of projects supported at previous events, together with feedback from projects and from attendees.

[www.thefundingnetwork.org.uk](http://www.thefundingnetwork.org.uk)

### THE SUSTAINABLE FUNDING PROJECT

The Sustainable Funding Project 4th Annual Gathering takes place on 18 March 2004 in London. It is a gathering where enquiring minds meet experienced practitioners committed to sharing their knowledge.

'How does our garden grow?' is a unique opportunity for voluntary and community organisations to:

- take a wide-ranging look at the funding climate and future developments
- think creatively beyond the perennial problem of time-limited grant dependency and associated insecurity
- identify emerging best practice across planning, fundraising and income generation

Who should attend?

Funding advisers from second tier, infrastructure agencies and local authorities working with voluntary and community organisations at the local level. Senior staff and trustees with strategic responsibility for the funding futures of their organisations. Funding bodies keen to explore and think further about their funding practice.

For more information contact Kim Turner on 020 7520 2519 or see

[www.ncvo-sfp.org.uk](http://www.ncvo-sfp.org.uk).

## 4. Notice of Meetings, Events and Training continued...

### WINGS

**Advancing Philanthropy – Call for Session Proposals:** The Forum of Regional Associations of Grantmakers (USA) seeks session proposals for the conference *The Established, The New, The Potential: Advancing Philanthropy Region by Region*, to be held 4-6 February 2004 in Washington, DC. The meeting seeks to convene participants who support existing philanthropies, catalyse new giving, or educate individual philanthropists. Although the primary focus is on regions in the USA, the Forum would be delighted to receive submissions from presenters in other regions. Proposals are due **10 October 2004**. For more information see [http://www.givingforum.org/news/philconf\\_callforsessions.html](http://www.givingforum.org/news/philconf_callforsessions.html) or contact Oscar Izaguirre at [oizaguirre@givingforum.org](mailto:oizaguirre@givingforum.org).

**International Fellowship in Philanthropy:** The Johns Hopkins Institute for Policy Studies, Center for Civil Society Studies is calling for applications for the International Fellows in Philanthropy Program for the 2004-2005 academic year. Based in Baltimore, Maryland, USA, the program affords an opportunity for advanced study, research, and training for up to eight participants each year who are involved in studying or managing private nonprofit, or philanthropic organizations outside of the United States, or working as NGO liaisons in the public or commercial sectors. The application deadline is **25 February 2004**. Special funding is available for Fellows from East Africa and for Fellows conducting research on Community Foundations. For more information visit [www.jhu.edu/~philfellow](http://www.jhu.edu/~philfellow) or contact Carol Wessner ([cwessner@jhu.edu](mailto:cwessner@jhu.edu)).

**Foundations for Peace:** An international network is emerging of foundations (community foundations or other) working in divided societies, launched by the Community Foundation of Northern Ireland in October 2003 and including so far foundations working in the Balkans, Israel, South Africa, and Sri Lanka. Based in areas of conflict, these funders wrestle with the unique problems of funding social justice, inclusion and peace building. Foundations for Peace is calling on other organisations and individuals worldwide working in this field to join to share experiences and to work collaboratively to advance their common causes. To this aim they are convening a second meeting to be held near Brussels, Belgium 15-18 January 2004. For more information on the network and the meeting and the participation criteria please download a short [backgrounder](#) (you will need the [Acrobat Reader](#)), or contact Ms. Jan Garrill, Centris, at [jangarill@centris.org](mailto:jangarill@centris.org), +44 191 232 6942.

[www.wingsweb.org](http://www.wingsweb.org)

## **4. Notice of Meetings, Events and Training continued...**

### **PERCENTAGE PHILANTHROPY WORKSHOP**

#### **Organised by the Nonprofit Information and Training Centre (NIOK)**

There will be a workshop in Budapest, 19 – 20 January 2004, to present the findings of a study on percentage laws in Hungary, Slovakia, Lithuania and Poland encouraging charitable giving to civil society organisations.

Percentage philanthropy refers to legal mechanisms which allow taxpayers to allocate a certain percentage of their previous year's paid income tax to beneficiaries entitled to receive such funds. Percentage type laws have been adopted in four countries in Central and Eastern Europe: Hungary, Slovakia, Lithuania and Poland. In each country the legal framework and mode of operation differ. The number and types of beneficiaries also vary but largely include non-governmental organisations (NGOs) carrying out public benefit activities.

[www.onepercent.hu](http://www.onepercent.hu)

[www.nonprofit.niok.hu](http://www.nonprofit.niok.hu)

## 5. Ideas for Christmas

### THE GIVING CAMPAIGN

Post Office Ltd is working in conjunction with The Giving Campaign this Christmas to promote the use of Gift Aid on charitable donations. A new range of Postal Orders, including a Gift Postal Order range, launched today by the Post Office could release up to an additional £5.6million for UK charities.

Charity donations by Postal Order total an estimated £20million a year and the new range of Postal Orders incorporates a Gift Aid declaration. Gift Aid allows charities to claim an extra 28% from the Inland Revenue over the face value of each Postal Order. For example, a £10 Postal Order with a completed Gift Aid section is worth £12.80 to a charity.

[www.givingcampaign.org.uk](http://www.givingcampaign.org.uk)

### NEW GOOD GIFTS CATALOGUE: CHARITIES ADVISORY TRUST

Funds charities through imaginative presents: Patrick Viera's choice is a holiday by the seaside for a hard-pressed family, Martin Bashir's is to establish a Bicycle Repair shop in Africa and Mo Mowlam's is a Bike for a Midwife in Sri Lanka. Alexei Sayle liked it so much he ordered two acres of rainforest as a birthday present for a friend.

A cluster of silver birch trees can mark silver weddings, and what lover would not appreciate the chance to revive a bluebell wood? From a trip to the pantomime for a deprived child in the UK, to computers for schools in Africa, there are gifts for everyone, from £10 - £1,000+. These are just some of the ideas offered in the Good Gifts Catalogue, and there are over 75 gifts in total for every possible occasion, and all types.

The recipient gets a great card, detailing the gift, a lasting warm glow and each gift comes with the guarantee it is always wanted.

The catalogue offers easy terms (for example staggered payments) , in memoriam gifts, a wedding and wish list service, and something no commercial catalogue can do; tax rebates (because the gifts are charitable) so higher rate tax payers get an 18% refund from the taxman. Every penny is guaranteed to go on the gift. Payments are gift-aided if the purchaser is a standard-rate British taxpayer and the recovered tax funds the scheme.

More Information

Hilary Blume

Tel: 020 7794 9835

Email: [people@charitiesadvisorytrust.org.uk](mailto:people@charitiesadvisorytrust.org.uk)

[www.charitiesadvisorytrust.org.uk](http://www.charitiesadvisorytrust.org.uk)

## 6. Appointments and Moves

### PHILANTHROPY UK

Ceri Johnson has now left Philanthropy UK, to take up a new post as Communications Officer for the Anchor Trust. We wish her the best of luck in this new role. Theresa's new assistant is Mary Wright.

### WINGS

Two new staff who joined WINGS last month.

Gina M. Estipona started her position as Projects and Programmes Coordinator. Before coming to Brussels, Gina served as Senior Development Officer of the Ayala Foundation, Inc. (AFI) in the Philippines.

Miryam Hernández Irigoyen became the new WINGS intern last month. Miryam succeeds our previous intern Jana Heimel.

For more information go to <http://www.wingsweb.org/admin/secretariat.html>.

### IMPETUS

Impetus trust moved on 12<sup>th</sup> November, and are now at:

Impetus Trust  
Hamilton House  
Mabledon Place  
London  
WC1H 9BB

Tel: 020 7953 0530

Fax: 020 7554 8501

[info@impetus.org.uk](mailto:info@impetus.org.uk)

[www.impetus.org.uk](http://www.impetus.org.uk)

### Feedback and comments

Please send your comments and contributions for the next issue by 23<sup>rd</sup> January 2004

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[www.philanthropyuk.org](http://www.philanthropyuk.org)