

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 includes over 350 recipients. They are drawn from a wide range of organisations including funders, academic institutions and researchers, umbrella bodies and associations, charity fundraisers, various independent initiatives and consultants. All past issues are 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. Recent developments in existing organisations

ARK

Donors from Europe's Hedge Fund community pledged £4,003,500 one of the largest amounts ever raised on a single night in the UK, for ARK (Absolute Return for Kids), a two-year-old charity that aspires to be a catalyst for the industry. The event was the second annual ARK Charity Evening at Old Billingsgate Market. Last year's event raised £2.1 million.

ARK will invest the proceeds in projects benefiting children in the UK, Romania, Kosovo and South Africa. In Romania, ARK has facilitated the closure of four communist-era institutions placing 607 children in secure homes; in Kosovo, ARK has a three year commitment to provide 3000 children post conflict counselling; in the UK ARK supports over 800 children whose parents are struggling with crises. ARK is currently negotiating a major new initiative with the South African government.

"It's a staggering amount of money to be raised from one event in one evening," said Andrew Watt, Head of policy at the Institute of Fundraising.

The ARK award for outstanding achievement was presented to Ken Griffin, founder and Chairman of the Citadel Group, both for his work as a pioneer in the industry and his generosity to ARK. Mr. Griffin matched all donations made on the final auction item: a fund earmarked for the purchase of anti-HIV drugs for South African mothers.

"I'm amazed the industry coughed up this much given the current environment for many managers," said Neil Wilson, Editor of EuroHedge.

Professionals from the fashion, music and film industry joined some of Europe and America's leading fund managers. Valentino and Philip Treacy attended the event, and also donated from their collections for the auction lots. Many others contributed items to be auctioned. Hugh Grant, who attended, agreed to play a round of golf with an auction lot winner, while Elle Macpherson, who wore a Valentino creation, agreed to be the winner's caddy.

"I'm overwhelmed. It was a night where we all pulled together and put kids first," said Arpad Busson, Chairman of ARK and of the EIM group.

Wines were donated by Domaine Clarence Dillon and Diemersfontein Wine and Country Estate in South Africa. Annoushka Ducas and John Ayton of Links of London donated profits from the sale of a specially designed wooden and silver 'Noah's Ark'. Theo Fennell designed and created the award.

Entertainment was provided by an all-star band made up of Roger Taylor and Brian May of Queen, Bob Geldof, Chris Thompson, Roy Wood. A film highlighting the work of ARK was produced for the night by Twofour productions.

The evening's sponsors included many leading City establishments.

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JUSTGIVING

We are reporting this because it emphasises the importance and the challenge of GiftAid administration.

The Limbless Association has raised more than £52,000 online before Gift Aid – or 20 per cent of the total £250,000 - with its appeal for 12-year-old Ali Ismaeel Abbas, who lost both his arms in a bombing raid on Baghdad.

In the first few days of the appeal, when the switchboard was often overwhelmed, the website was taking more than 40 percent of all donations. Without an online service, they would have lost a significant amount of donations.

More than 50 per cent of gifts were made from overseas, many of them overnight, proving the attractiveness of a fundraising method that is ‘open’ 24 hours a day and needs no support staff to run.

Thanks to Justgiving’s automatic Gift Aid reclaim, the charity will gain another £6,549 from the Treasury. By contrast, they are now facing the major task of handling all offline donations and posting hundreds of Gift Aid declarations to donors. Justgiving undoubtedly helped reduce their administration burden.

The online success of Ali’s Fund demonstrates the benefits of online fundraising for smaller charities. Justgiving enables any charity to scale up their operations massively in a matter of hours, with no upfront investment or extra staff.

The Justgiving system is designed to save charities time and administration costs. Donations and Gift Aid are transferred directly into charities’ bank accounts, significantly cutting down on paperwork.

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VENTURESOME

Venturesome was launched by CAF in early 2002 to test both the value and the viability of a risk capital fund for social and charitable enterprises. The fund would accept greater financial risk than banks, and would aim to recycle money several times in contrast to the one-off donation of a grantmaker.

Venturesome works with people who deliver charitable work that can make a lasting social impact. Venturesome provides financial advice, standby facilities and medium term funding, normally at risk, in order to build the sustainability of its clients.

Venturesome has completed its first year of providing risk capital for charities and social enterprises. A review of the first year highlights encouraging signs of the development of the social investment market.

Venturesome has worked in detail with 50 charities and social enterprises in order to find the most appropriate form of funding for each project. The £1m which Venturesome has offered to 20 projects has fallen into three main categories:

- pre-funding of fundraising (50%);
- new streams of income generation (33%);
- working capital (17%).

The form of financing has ranged from debt through to mezzanine debt and equity in the following proportions:

- secured loans (30%);
- unsecured loans (60%);
- quasi-equity (5%);
- equity (5%).

Performance of these loans and investments to date has been ahead of the Venturesome benchmark which expects a write-off / grant rate of 7.5% pa. 25% of the financing for projects has already been recycled, with the projects up and running helped by Venturesome's underwriting support. 10% has fallen away, while 65% remains committed and outstanding.

Venturesome has raised support from its parent charity CAF, Barclays Bank, two major grantmaking trusts and a private individual. Venturesome currently has £1.5m available for its lending/investments.

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2. New Initiatives and recent events

BIGINVEST

BIGinvest (formerly Capital for Communities) will be the first national wholesale fund providing loans to the UK community finance sector. Community finance is relatively new to the UK and has been growing rapidly in recent years, supported mainly by investment from the government's Phoenix Fund. However, most community funds remain small and locally based, and many smaller players find it difficult to access commercial bank finance, leading to undercapitalisation and dependency on grant funds. By providing a reliable source of competitively priced, large scale loan finance, BIGinvest will help to strengthen the community finance sector as a whole and to support regeneration of some of the UK's most deprived areas.

BIGinvest will make large scale, long-term loans to community development finance institutions (CDFIs) which in turn provide finance for disadvantaged communities throughout the UK. BIGinvest will lend to organisations which can demonstrate the capacity and willingness to repay, and which have limited or no access to large-scale commercial sources of finance. The fund will focus on organisations seeking loans to expand or strengthen existing operations, with the aim of assisting those organisations to grow to a point where they are considered 'bankable'. BIGinvest will also facilitate access to other sources of long-term finance wherever possible.

As well as lending to CDFIs, BIGinvest will also make loans directly to large social enterprises. In each case, BIGinvest will lend to viable organisations in situations where commercial finance providers might be unwilling or unable to lend, and will make every effort to provide flexible finance which meets the needs of the borrower. Because of its specialist focus, BIGinvest will be able to take a proactive and flexible approach towards lending and the management of credit risk across its loan portfolio. BIGinvest will seek to minimise credit risk through developing and maintaining close and open relationships with borrowers and through a rigorous due diligence process.

As a high-profile, national fund, BIGinvest will help to increase public awareness of the community finance sector and provide a new social investment opportunity. In particular, BIGinvest will offer the recently introduced Community Investment Tax Relief (CITR). Under this scheme, investors will receive net annual tax relief of 5% of the value of their investment, equivalent to an 8.3% pretax return for a higher rate taxpayer and 7.1% for a corporate taxpayer. In the fourth quarter of 2003, BIGinvest will launch a public bond issue which will qualify for CITR, providing investors with both a social and financial return on their investment.

BIGinvest is a new initiative from The Big Issue, one of the UK's most successful and widely recognised social businesses, and is supported by funding from Bank of Scotland Community Banking. The fund is due to launch operations in the third quarter of 2003.

BRIDGES COMMUNITY VENTURES INVESTS IN EYEBRIGHT PLC

Bridges Community Ventures, the UK's first community development venture capital company, announces that it is investing in Eyebright Plc, a start-up company set to provide cataract surgery facilities to the NHS and private sector healthcare providers.

Eyebright aims to reduce cataract patients' waiting time between diagnosis and treatment, and generally to provide a better and faster service than currently available to most patients. It has developed a modular operating theatre system, which will include twin theatres and can be situated on hospital sites or in general office locations. These are dedicated facilities with highly trained staff and state of the art equipment.

Run by a management team of healthcare specialists with extensive hands-on experience of the sector, Eyebright is building its first clinic in Hull, due to open in early June. Milind Pande, a leading ophthalmologist in the area, has agreed to bring his entire caseload of cataract patients to the new clinic.

Eyebright plans to build 25 clinics over the next five years, working closely with leading regional ophthalmologists.

Commenting on the investment Carolyn Maddox, Director of Bridges Community Ventures, who will join the Eyebright board, said, "We are particularly pleased to invest in Eyebright Plc, a company committed to delivering a strong social impact by rolling out specialist clinics for cataract patients in under-invested areas of England. These clinics will provide more efficient, lower cost cataract surgery to both the NHS and the private sector, where there is a strong, and increasing, market need for cataract surgery.

Dedicated day surgery facilities have been successful in the US and Europe and we believe the company has strong financial prospects. We also anticipate it will make a strong positive impact on the local communities through employment opportunities, supply chain expenditure and addressing the NHS backlog."

Richard Poulden, Chairman of Eyebright plc, adds, "We are delighted by the vote of confidence in Eyebright that the investment by Bridges Community Ventures represents. There is a tremendous opportunity in this sector over the next few years and Eyebright will be well-placed to offer affordable, high quality surgery in areas identified by the Department of Health as high priority."

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FundUK

FundUK, the e-mail discussion list used by over 500 fundraisers every day, has moved to a Web-based bulletin board. The new system offers fundraisers many more ways to use and contribute to the discussions about all aspects of fundraising.

<http://www.fundraising.co.uk/forum>

FundUK, set up in 1996 by Howard Lake, founder of UK Fundraising (www.fundraising.co.uk), is a free forum that enables fundraisers and fundraising consultants to share advice and information using e-mail. Thousands of messages have been exchanged over the years, helping fundraisers save money, raise funds and learn from each others' successes and failures.

Under the new system, FundUK's messages can now be viewed and searched on the Web. Registered users can still receive e-mail notification of all new messages, or they can now choose to receive notification only of certain messages or discussions on areas of particular interest to them.

FundUK will now be part of the UK Fundraising Forum, which it is expected will host a number of other fundraising discussion forums, including those run by other organisations or groups. As a result, FundUK will for the first time be fully integrated into the UK Fundraising Web site (www.fundraising.co.uk), the 5,000 page online resource for the fundraising profession.

The new Web-based version of FundUK offers a great deal more to the fundraisers, consultants and agencies who use it. The Web-based archive should grow into a very valuable resource, representing the freely given expertise and experience of hundreds of fundraisers. Howard Lake hopes that the new Web-based system will further enhance FundUK's reputation as an innovative tool to help fundraisers improve their expertise and effectiveness.

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PLANET FINANCE UK

PlaNet Finance is a global charity in the field of microfinance. Microfinance involves the provision of unsecured loans at fair interest rates to the poorest in developing countries. These loans allow disadvantaged individuals to start small businesses and begin to improve their lives.

PlaNet Finance was founded in France in 1998 to help microfinance institutions in developing countries to enhance their capabilities, professionalism and effectiveness. Through the provision of training and technology, they assist microfinance institutions to adopt better methods of monitoring and to deliver larger volumes of small loans to micro-entrepreneurs in developing countries.

Their work relies on partnerships with private corporations, federal and local governments, NGOs and individuals.

PlaNet Finance UK will further the objectives of the global PlaNet Finance organisation through training, rating and fund support to microfinance institutions in English-speaking developing countries and Eastern Europe. They are currently establishing relationships with microfinance institutions in Africa and supporting the regional development of microfinance in India.

They are planning a reception to mark the launch in the UK on the 1st July 2003. The event will provide an opportunity for potential partners, particularly from the corporate and non-profit sectors, to learn more about their work and to discuss how they may wish to become involved.

The event will be hosted by their Board of Directors:

- Chairman: Keith Clark, International General Counsel, Morgan Stanley
- Pehr Gyllenhammar, Chairman of Aviva Insurance
- Armel Cates, Retired Partner at Clifford Chance
- Jaques Attali, Founder and Chairman of PlaNet Finance France
- Arnaud Ventura, Managing Director of PlaNet Finance, France

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LONDON BUSINESS SCHOOL

Jed Emerson, Advisor to Hewlett and Packard Foundations, and lecturer at Stanford, visits London to discuss “The Blended Value Proposition.”

London Business School, with the generous support of Bridges Community Ventures, was proud to host a visit to London by Jed Emerson, a noted practitioner of engaged philanthropy and now a leading proponent of alternative methods to measure the social, environmental, and financial impact of organizations. Mr. Emerson’s background includes almost a decade as a social worker and nonprofit executive, eight years as Executive Director of the Roberts Enterprise Development Fund (www.redf.org), and teaching positions at Harvard and Stanford Business Schools.

The principal purpose of Mr. Emerson's visit was to deliver the opening keynote address of the 2nd Annual London Business School Conference on Corporate Social Responsibility and Social Enterprise with John Elkington, Co-Founder of Sustainability (www.sustainability.com). Their address was entitled "The Blended Value Proposition: Maximizing Value in Pursuit of Multiple Returns". In their talk, Elkington and Emerson proposed a means to redefine the traditional extremes of how "investment" is measured by society) through the "Blended Value Proposition." In short, the Blended Value Proposition (BVP) charges businesses and non-profit-making organizations to measure all impacts of their work -both positive and negative- and be accountable for uses of all kinds of capital: Financial, Social, and Environmental/Natural. See <http://money.cnn.com/2002/10/28/pf/investing/emerson/> for more about Mr. Emerson and the BVP. Commenting on the implications of the BVP, Emerson stated:

"The capital implications of the BVP are that capital markets are venues within which investors increasingly pursue *value maximization*—blended value that is increasingly understood as economic, social and environmental in nature. From a BVP perspective, the only difference between non-profit and for-profit corporations is the issue of distribution of profits—yet the legal structures and regulatory frameworks we've created to artificially separate social value into one and economic value into the other have led to Capital Market Inefficiencies. These include the extension of the myth that one is charged with social value creation while the other is charged with economic value creation, when in fact *both* create blended value and multiple returns and the Under-Performance of For-Profit and Non-Profit corporations relative to potential for maximizing value generated by investments of all forms of capital (Market, Concessionary/PRI or Philanthropic)." Slides from the presentation can be found at <http://www.lbs-csrclub.net/introduction.htm>

To further develop the idea of the BVP, Mr. Emerson is currently mapping work related to the BVP which is occurring in "silos" which Emerson defines to include: Corporate Social Responsibility; Social Entrepreneurship; Socially Responsible Investing; and Strategic/ Effective Philanthropy. This mapping process hopes to identify systems and approaches which can be shared amongst practitioners in each silo, and to identify cross-cutting ideas from different disciplines which together will further develop the idea of the BVP. The results of the first stage of mapping work will be released in Sept. 2003. More information about the process can be obtained from Kim Brehm (k.brehm@hewlett.org).

A final part of Mr. Emerson's trip was a gathering of 25-30 philanthropic leaders, which was generously supported by Michael Pattison of the Sainsbury Family Trusts and facilitated by David Carrington. At the gathering, Emerson discussed his work as an engaged philanthropist during his time as Executive Director of the Roberts Enterprise Development Fund. More information on this topic is outlined in Emerson's article entitled, "Total Foundation Asset Management: Exploring Elements of Engagement Within Philanthropic Practice," which can be found along with several other relevant readings at

<http://venturephilanthropypartners.org/learning/resources/readings.html>

3. Research and Publications

INSTITUTE FOR PHILANTHROPY

Charities could be missing out on millions of pounds because they fail to understand or meet the expectations of major donors. They rely too much on traditional one-off fundraising campaigns, engage in "short-term, ad-hoc thinking and activities" and have "difficulty sticking to a strategy even if one is in place" to deal with large donors, according to the study published by the Institute for Philanthropy and international finance experts, the Ansbacher Group.

The status of major donor fundraising - securing donations from people giving more than £5,000 - ranges from "very amateur" to "very sophisticated and professional" but "the vast majority of charities would benefit from a more disciplined approach", the study stated.

It urged charities to see major donors as clients and build up relationships with them.

Both the structure and the culture of charities "inhibit the development of major donor fundraising", it stated, with fundraisers "not as central to the organisation's decision-making as they should be." Fundraising should be part of the responsibility of trustees and senior executives and not simply left to professional fundraisers, the study found.

The research also found that many donors would like to become more involved in their chosen charities but are given few opportunities to do so. Donors can feel taken for granted and as a result either limit or halt their giving.

Judie Lannon, the report's author, said: "This shows that charities must take a far more professional and pragmatic approach to the relationships they have with their major donors or risk losing them completely.

"The well-meaning, amateurish approach has got no place in a tough commercial world - giving has come of age and charities must respond accordingly."

Hilary Browne-Wilkinson, director of the Institute for Philanthropy, said 6% of people contributed about 60% of all money donated to charities. "Anything which can be done to improve the understanding of the needs and motivations of this important group can only be of help to the sector as a whole."

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LLOYDS TSB FOUNDATION FOR ENGLAND AND WALES

The Lloyds TSB Foundation for England and Wales has just published its second report on impact assessment. The Foundation established a pilot project in 2001 as a part of a process to strengthen the Foundation's approach to monitoring and evaluation

The pilot was built around a questionnaire-based survey. Foundation staff interviewed 130 organisations working in the area of mental health as part of the project. Results from the interviews have been aggregated into quantitative indicators of how recipient organisations assessed the impact of Foundation funding on their activities.

The main focus of the questionnaires was around three main evaluation themes: impact on service users, impact on organisation and wider policy and practice.

Key Findings

- 92.3% of respondents considered that the Foundation had a moderate or high impact in relation to increasing the confidence of service users
- 82.3% of the organisations indicated a moderate or high impact in terms of involvement in decision-making processes
- 64.7% of the respondents indicated that the funding had a moderate or high impact on increased efficiency (with evidence about management systems, IT, monitoring and evaluation)
- Funding from the Foundation was seen by two thirds of respondents as having a moderate or high impact on local policy and practice, although for 69% of respondents there was no or a low impact on national policy and practice. This could be as a result of the low number of national charities included in the project.
- A Comparison between core and project funding suggests that the Foundation's grants towards core costs have a slightly higher impact than the grants towards project funding.
- There is also little relationship between size of donation and the level of impact, suggesting that small donations can make as much of a difference in achieving outcomes as large ones. There is also no correlation between size of the annual budget of participants and the impact of the Foundation's giving.

Next Steps

The Foundation intends to continue to assess the impact of its grant-making in the light of outcomes it wants to achieve, assess its own efficiency as an organisation, assist in the development and application of best practice and continue to contribute to learning within the wider voluntary sector.

In 2003 the aim is to undertake a third pilot study, this time concentrating on the Foundation's Collaborative Programme.

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SOCIAL MARKET FOUNDATION

Making a bigger splash: Moving from spare change to planned charitable giving

Beth Egan's paper argues that there is a need for further modernisation of fundraising techniques and for the government to move further and faster in promoting and incentivising regular, committed, tax-efficient giving:

The decline in charitable giving that occurred during the mid 1990s led the current government to call for the creation of a Giving Age aiming to increase both the number of people who give to charity and the amount that they give.

Changes to the fiscal framework for giving, introduced in Spring 2000, and the launch of major initiatives such as the Giving Campaign in 2001 have successfully arrested the decline and seen a rise in the total amount of individual charitable donations at the start of the new millennium. However, the paper states that the methods of fundraising in Britain are still largely unsophisticated. Too much fundraised income continues to be generated by old-fashioned techniques that attract 'spare change donations' such as tin rattling, door to door collections and selling raffle tickets. 'Spare change gifts' are unpredictable, creating uncertainty for charities and their clients, and such gifts are inadmissible for tax relief.

The SMF has conducted an original survey amongst over 10,000 current charity donors to analyse trends in giving and attitudes towards 'spare change giving'. Whilst there are encouraging signs that givers, notably wealthier givers, increased their donations in 2002, many donors are still participating in 'spare change giving' which results in overall low levels of giving and leaves the donor feeling disengaged from any Giving Culture as they do not know where the money goes or what it achieves.

The report shows that continuing requests for 'spare change gifts' is an inefficient form of fundraising; it is also far less satisfactory for the charity, the charity clients and the donors than planned, regular giving.

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UKSIF AND JUST PENSIONS

Do UK Charities Invest Responsibly?

The latest Just Pensions report by Duncan Green, based on collaborative research undertaken with CAF (Charities Aid Foundation) and EIRIS, shows that nearly two thirds of the UK's largest charities currently have no written ethical or socially responsible investment policy. In addition, only a third of those in this situation are planning to address the issue in the next 12 months. The report was covered on an exclusive basis by the Guardian on Wednesday 14 May (<http://society.guardian.co.uk/charityfinance/story/0,8150,955121,00.html>). To download the full report and press release visit www.justpensions.org.

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WEALTH TRANSFER IN AN AGE OF AFFLUENCE

A 1999 study by John J. Havens and Paul G. Schervish of the Social Welfare Research Institute, Boston College, concluded that over the next 55 years upwards of \$41 trillion dollars will be transferred from one generation to another through inheritance, philanthropy, and taxes. Recently, they wrote a report confirming the validity of those estimates, despite the downturn in the economy and equity markets. (Both studies may be downloaded from www.bc.edu/swri.) What does this mean for wealth holders, for philanthropy, and for anyone living in the current era? An interview with Professor Schervish about these questions and some of his groundbreaking research on wealth holders can be found on the More than Money website

http://www.morethanmoney.org/articles/mtm32_schervish.htm.

WINGS

WINGS have just released the 2003 Community Foundation Global Status Report on the WINGS-CF website. This new global report on community foundations is a complete update of the 2000 report (Growth of Community Foundations around the World, still available on the website). It has been researched and written by Eleanor Sacks and is available in English and Spanish. It provides detailed country reports and analyses and outlines trends in different countries and regions. It also explores the ways in which community foundation support organisations and networks have developed. The latest count of community foundations worldwide, across 37 countries, is almost 1,100, a nearly 60% increase in just three years. The new report will be available ONLY online, and WINGS aim to update it on a regular basis.

This is a publication by the Council on Foundations (USA) and WINGS-CF.

http://www.wings-cf.org/global_report/index_e.cfm English version

http://www.wings-cf.org/global_report/index_s.cfm Spanish version

Also to be found on the website is the new publication *Establishing a resource center: A guide for organizations supporting community foundations* by Barbara Denmark Long. Although this has been written especially to help the many organisations working with community foundations, the bulk of the document is of much broader use and interest. It covers all aspects of the establishment of a resource centre or information centre or library, and shares the skills and experience of a librarian in a most helpful and practical way. It should be of great value to any association or support organisation which does not itself have the benefit of a librarian on the staff.

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4. Notice of meetings, events and training

NCVO

The 'Summer in the City' seminars aim to enable organisations to get up close to successful income generators and carve out some space for detailed exploration of what it takes to earn it. In partnership with the Community Action Network, this series has been designed with close regard to feedback from their 2003 Annual Gathering which asked for more opportunities to learn directly from case studies.

Building on their introductory events, this joint production between NCVO's Sustainable Funding Project and the Community Action Network is a chance for people who have given some real thought to income generation and who want to set aside some space for closer enquiry. The seminars are not training events but platforms for robust discussion. How did the success stories get there? And how are they finding it now? The chances and challenges, trial and tribulations of generating income from trading goods and services.

Each seminar runs from 2pm until 5pm. They will begin with two case studies followed by facilitated discussion from the Community Action Network and NCVO's Sustainable Funding Project. It's an opportunity for more detailed exploration of income generation than a conference allows. Tales from the experienced. A creative space to think.

Tuesday 8th July

Paul Harrod, Founder and Chief Executive of Aspire

(Aspire is a catalogue company creating employment for people who are homeless)

Fiona Hamilton-Fairley, Founder and Chief Executive of The Kids' Cookery School
(KCS teaches all kinds of kids how to eat and cook good food)

Tuesday 15th July

Colin Crooks, Chief Executive of Greenworks *(an office furniture recycler)*

Jackie Nunns, Chief Executive of the Trojans Scheme *(an after school scheme operating in south London)*

Tuesday 22nd July

Alan Sharland, Director Hillingdon Community Mediation *(it does exactly what is says on the tin)*

Adele Blakeborough, Director of Community Action Network and formerly of Kaleidoscope in Kingston

£25 (or £15 to CAN or NCVO members). All venues are located in central London.

Places are limited to 10 per seminar and will be awarded on a strict first come first served basis. Events invariably sell out and early booking is recommended.

THE FAMILY PHILANTHROPY FORUM

Now in its third year, Campden's *Family Philanthropy Forum*, will take place 14th & 15th October, 2003 in London. This private meeting is exclusively for families, their private offices, foundations, trusts and close advisors. The forum will bring together philanthropic thinkers, family philanthropists and experts to debate this year's central theme of how families can develop partnerships and promote co-operation in philanthropy. The panel of expert speakers will include:

- Jane Ashley, Chair, The Laura Ashley Foundation, UK
- Dieter Berg, CEO, Robert Bosch Foundation, Germany
- William Drayton, Chair & CEO, Ashoka, USA
- Roland Kaehlbrandt, CEO, Hertie Foundation, Germany
- Laura Olivetti, President, Fondazione Adriano Olivetti, Italy
- Felipe Gomez Pallete, Director General, Fundación Amancio Ortega, Spain
- Felicitas von Peter, Director, Bertelsmann Foundation, Germany
- Stefan Schmidheiny, Founder & Chair, Avina Foundation, Switzerland
- Adele Simmons, Philanthropic Advisor, World Economic Forum, USA
- Cummings Zuill, Director & Chair, Centre on Philanthropy, Bermuda

Programme highlights include:

- The role of family members
- Fostering philanthropic partnerships
- Legacy versus paydown
- Case studies of existing philanthropic partnerships including a focus on the developing world and on education.

The Family Philanthropy Forum is facilitated by Campden Publishing Limited as part of a series of private meetings for families. The meetings are private in that they are by invitation only and not publicly advertised or reported. Attendance at the Forum is limited to family members, donors, family office professionals, trusts, foundations and their close advisors. Attendance from the financial service community is restricted to small numbers from the sponsoring companies.

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THE FUNDING NETWORK

Interested in well run charitable projects that effect social change?

Willing to consider making a financial contribution yourself in a setting with no pressure?

Like to be involved with a group in which every member can recommend projects for funding?

As you may have seen in the Guardian article about TFN on April 23rd, those attending are very enthusiastic about it. People are interested to come and see for themselves how philanthropy can be fun and engage people in a new way

The last Funding Day raised over £47,000 for nine projects - which ranged from a literacy programme for UK prisoners and their families, to work with street children in South Africa – and hopes to do at least as well this time. The Selection Committee will be meeting mid June to choose the ten for this event.

Half of the projects will be presented by the organisations themselves in the morning. This will be followed by lunch where potential donors will have the opportunity to talk to these organisations and network with other individuals committed to social change giving. After lunch, the remaining projects will be presented by Funding Network members.

They will then hold an open pledging session where TFN hope to raise funds for the presenting organisations. Although it is hoped that many contributions will be made, there is no obligation to do so. The pledges made are generally between £100 and £1000 towards an individual project; some support one project, some support all, some none.

The next meeting of the Funding Network is on Saturday July 5th at the RIBA in Portland Place W1, starting with coffee at 10.00 for a 10.30 start.

The Funding Network is responding to requests from members and attendees for a shorter version of their funding days with its first evening event on Thursday September 11th, generously hosted by McKinsey and Co in their Jermyn Street offices.

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www.thefundingnetwork.org.uk

THE PHILANTHROPY WORKSHOP

The Philanthropy Workshop is a project sponsored by the Rockefeller Foundation and the Bertelsmann Foundation, in partnership with The Institute for Philanthropy (U.K.), BMO Harris private Banking (Canada) and The Toskan Family Foundation (Canada).

The aim is to create a global network of strategic philanthropists with the skills, commitment and imagination to make a significant contribution to pressing issues of our time. The Philanthropy Workshop was established in 1995 by the Rockefeller Foundation and has grown in scope and reputation since then, with partnerships in Argentina and Canada. Although the initial focus was with US donors, they have seen an increase in participants from other countries and for the first time this year, the workshop will be run partly in Europe, with co-sponsorship from the Bertelsmann Foundation.

Participation in the TPW network begins with an intensive yearlong workshop comprised of four modules. Each module explores critical elements of international and strategic philanthropy through a variety of methods, including site visits, case studies, seminars, discussions, colloquia and retreats. Four goals link the modules: deepening one's understanding of critical social issues and philanthropy's role in solving them; sharpening strategic grantmaking skills; further developing one's leadership; and building and strengthening the TPW network. Participation in TPW entails attendance at all four modules. For each module, participants are given preparatory readings. Workshop faculty include leading experts in the public, for-profit and nonprofits sectors from North America, Europe and the developing world.

TPW at a Glance: Dates and Locations

Module i: Developing a Framework for Strategic Philanthropy
October 15–19, 2003, New York, NY

Module ii: Building Skills and Examining Issues
January 14–18, 2004, Berlin, Germany, and Slubice, Poland

Module iii: Exploring Strategic Philanthropy in a Regional Context
March 31–April 4, 2004, Country break-out modules in Hamburg, London, Toronto and Washington, D.C.

Module iv: Collaborating Across Borders: Global Philanthropy
June 11–16, 2004, Thailand

The cost of the course is \$12,500, excluding participants' personal expenses.

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5. Appointments and moves

COMMUNITY FOUNDATION NETWORK

Community Foundation Network and London Community Foundation have moved:

Arena House, 66-68 Pentonville Road, London, N1 9HS

Arena House is 100 metres from Angel tube.

Tel: 020 7713 9326

Fax: 020 7713 9327

Email: network@communityfoundations.org.uk or info@londoncf.org

WINGS

The WINGS website has a new host (the European Foundation Centre) but is still found at <http://www.wingsweb.org/>

New Committee members

Following a thorough nomination process to find new members for WINGS Coordinating Committee, there are six new members who between them add considerably to the range and diversity of the Committee. They are:

- **Tobias Henkel**, Director of International Programmes and Legal Counsel, Bundesverband Deutscher Stiftungen (German Association of Foundations)
- **Natalya Kaminarskaya**, Executive Secretary, Russian Donors Forum
- **Rebecca Raposo**, Executive Director, Grupo de Institutos Fundações e Empresas (GIFE), Brazil
- **Lourdes Sanz**, Community Foundations Coordinator, Centro Mexicano para la Filantropía (CEMEFI)
- **Rory Tolentino**, Executive Director Asia Pacific Philanthropy Consortium, based in The Philippines
- **Iftekhar Zaman**, Executive Director, Bangladesh Freedom Foundation _ Philanthropy Resource Centre

The new Committee will meet shortly and will be selecting new officers.

Philanthropy UK

a project of ACF

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Issue 8

Please send your comments and contributions for the next issue by 25th July

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www.philanthropyuk.org

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