

# Philanthropy UK

A quarterly e-letter for all those interested in the **Development of Philanthropy**

CURRENT NEWS FROM THE WORLD OF PHILANTHROPY ■ ISSUE 20 ■ MARCH 2005

*The PhilanthropyUK Newsletter emerged from the PhilanthropyUK Project directed by Theresa Lloyd, which ended in 2004. It is currently being overseen by a consortium of organisations, including the Association of Charitable Foundations (ACF), Charities Aid Foundation (CAF), Community Foundation Network (CFN), Impetus Trust, Institute for Philanthropy, New Philanthropy Capital (NPC) and Pilotlight. The editorial board is chaired by David Carrington.*

*While the Newsletter is focused on new initiatives in philanthropy, we also want to provide our readers with information and developments that have a 'double-bottom line' return—that is, those that offer a social as well as a financial return—which we have decided to do through a link with the UK Social Investment Forum (UKSIF). The March 2005 issue introduces a new feature, *What's New in Social Investment*, an overview of recent developments in the social investment sector. This quarterly update will be prepared by Adam Ognall, co-ordinator of the Charity Project jointly run by the Ethical Investment Research Service (EIRIS) and UKSIF. Future social investment-related Newsletter submissions should be directed to Adam, at [adam.ognall@eiris.org](mailto:adam.ognall@eiris.org).*

*We always welcome comments and ideas for inclusion in future editions - and urge every reader to suggest at least one new subscriber! For comments and suggestions, please contact Anja Hubrath, Newsletter co-ordinator, at [Anja@acf.org.uk](mailto:Anja@acf.org.uk).*

*Best wishes,*

*David Carrington, David Emerson, Susan Mackenzie and Bernard Mercer  
PhilanthropyUK Newsletter editorial board*

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### Tsunami appeal to sustain impact on charitable giving?

Described by the UN as “among the worst human tragedies in history”, the tsunami disaster in Southeast Asia affected people around the globe. Roughly 250,000 people are believed to have perished, 200 of them Britons, while hundreds of thousands more must somehow rebuild their lives amidst utter devastation. The response of the British public has been “amazing”, according to Brendan Gormley, the Chief Executive of the Disasters Emergency Committee (DEC). Within two months of the tsunami disaster, DEC’s tsunami appeal brought in £300 million in donations, according to the BBC. Other British charities raised an additional £50 million, while the Government has promised £75 million to the aid effort.

Yet, although the tsunami appeal received a tremendous response, its impact on overall charitable giving in the UK is as yet unknown. A recent member survey by the Institute of Fundraising (IoF) found that one-fifth of the 293 respondents reported an increase in income in January; another one-fifth reported a decrease in income; while the remainder reported no meaningful change. However, of those organisations that attributed the increase to the tsunami appeal, 73% were either members of DEC or were involved in tsunami-related fundraising. Of more concern is the fact that 80% of charities reporting a decrease cited the tsunami as the main factor. A follow-up survey will be conducted in June.

Expectations of the longer-term impact of the tsunami appeal on charitable giving are less certain. Almost half of the IoF survey respondents indicated that they ‘did not know’ what the longer-term impact would be. However, one-quarter of the respondents forecast a negative impact, predicting that, at least in the current fiscal year, both individual and corporate donations would decline and that new donors would be harder to attract.

Less than one-third anticipate a positive impact. The most frequently cited positive outcomes were a raised profile of the voluntary sector and an increased ‘feel-good’ factor from giving. Less than 20% indicated increased donations as a potential benefit. These results were echoed in a *Third Sector* ‘Hot issue’ debate (2 March 2005 issue), where an environmental charity and an aid

agency predicted an increased awareness of environmental degradation and global need, respectively.

Other surveys offered an encouraging outlook for two very different segments of donors. An ICM poll commissioned by NCVO revealed an especially strong response among the nation’s youth. Of the 18-24 year-olds who responded to the poll, 86% said that they gave to a charity in response to the tsunami appeal; and of those who gave, 37% were not regular donors to charity. For all respondents (of all ages) who gave money for the tsunami disaster recovery, 54% said that they were regular donors who would give the same or more to charities this year. Meanwhile, Age Concern Research Service reported that nine out of ten people over the age of 50 said that their contributions to the tsunami appeal would not affect their other charitable giving this year.

One *PhilanthropyUK Newsletter* reader, the chief executive of a national foundation, summarised: The tsunami appeal “alerted a wider donor base to international needs”, but he cautioned that the “challenge is to deploy resources effectively; failure to do so could easily harm fundraising for overseas aid in the future.”

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### Impetus Trust makes two investments

Impetus Trust has announced two new investments. The venture philanthropy fund will invest £330,000 in St Giles Trust over three-and-one-half years, to support the charity in its transformation from helping the homeless to assisting offenders “turn their lives around and make a positive contribution to society.” St Giles will enable offenders to access housing, benefits, and medical treatment, and will offer basic skills training with pathways to further education and employment. Building on these services, St Giles will also extend its work with affected communities, including providing estate-based support to vulnerable tenants. The Impetus investment also includes management and capacity-building support, focusing on business planning, branding, management development programmes, and performance measurement.

Impetus is also investing in the Eating Disorders Association (EDA), a national charity that provides information and support to people affected by anorexia, bulimia, and

other eating disorders. To support the charity's re-branding campaign, Impetus will provide £325,000 in infrastructure funding through March 2009, as well as management and capacity building support. Non-financial support will include trustee and management development, financial systems, business planning, and performance management.

Impetus Trust, believed to be the first general philanthropy fund in the UK, aims to enable the charities it supports to "have a greater impact on the lives of more people in need by improving the quality, efficiency, and effectiveness of the services delivered." For further information, contact Impetus Trust at 0207 953 0530, or visit their website, [www.impetus.org.uk](http://www.impetus.org.uk).

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### King Baudouin Foundation launches new online giving tool

The Brussels-based King Baudouin Foundation, together with Transnational Giving Europe (TGE), has launched a new cross-border online giving tool for donors and charities. The tool is an interactive databank that provides information for donors, intermediaries, and beneficiaries on the legal and fiscal aspects of cross-border giving, taking into account the home country of the donor and the beneficiary, as well as the country where the assets are located. It covers the 15 EU countries before enlargement and Switzerland. The Charities Aid Foundation (CAF) is the UK partner of TGE. For more information, contact Ludwig Forrest at [forrest.l@kbs-frb.be](mailto:forrest.l@kbs-frb.be) or visit the giving tool's website at [www.givingineurope.org](http://www.givingineurope.org).

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### Venture capitalists climb Mt Kilimanjaro for charity

In a trek organised by the European Venture Philanthropy Association (EVPA), a group of 17 venture capitalists, their family members and business associates raised over €250,000 (£170,000) for charity by climbing Mt Kilimanjaro in February 2005. The participants, all of whom made it to the top, walked 46 miles, up 13,000 feet, in eight days to reach the 19,300-foot summit. Of the total donations raised, one-third will benefit EVPA; one-third will help Friends of Tanzania, a UK charity that supports impoverished people in the Kilimanjaro area of Tanzania; and one-third will be distributed to 15 charities designated by the individual participants.

The EVPA is a membership association aimed at organisations and individuals who either are practising venture philanthropy or who are interested in learning more about it. In addition to supporting its membership base, EVPA also actively promotes venture philanthropy throughout Europe as an effective means of philanthropy. Chairman Doug Miller explained that the funds raised from the trek will be focused on "expanding the knowledge and practice of venture philanthropy throughout Europe." The association was founded in January 2004 by five professionals in the European venture capital industry, all of whom are either founders or investors in their own venture philanthropy organisations. The EVPA will host its first annual conference on 15 June 2005 in London.

For more information on EVPA, or to subscribe to the EVPA quarterly newsletter, contact at [info@EVPA.eu.com](mailto:info@EVPA.eu.com), or visit [www.EVPA.eu.com](http://www.EVPA.eu.com).

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### Active Communities Unit spins off charitable giving group

The Active Communities Unit (ACU) of the Home Office has spun off a new Volunteering and Charitable Giving Unit (VCGU). VCGU, headed by Richard Harries, will "seek ways in which the Government can support and encourage higher levels of charitable giving among greater numbers of people". The existing ACU will continue to focus on the development of a healthy voluntary and community sector. For more information, contact VCGU at 0207 035 5349 or 0207 035 5002, or visit [www.homeoffice.gov.uk/inside/org/dob/direct/vcgu.html](http://www.homeoffice.gov.uk/inside/org/dob/direct/vcgu.html).

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### The Funding Network launches new affiliate in Cambridge

Cambridgeshire Community Foundation (CCF) and The Funding Network (TFN) joined forces to launch The Funding Network in Cambridgeshire on 2 March 2005. The event was held at the Pitt Building in Cambridge (courtesy of Cambridge University Press) and was attracted over 40 people.

After supper and a chance for networking, the audience heard brief presentations from five different projects, all of which have a link to Cambridgeshire. The projects were:

- A project to establish Romani Radio, the UK's first gypsy community radio station;

- A primary school playtime buddy scheme seeking to tackle exclusion, isolation, and bullying amongst pupils;
- A project placing university engineering students on development projects overseas where they train locals in maintenance skills;
- A project seeking to provide profoundly disabled people with useful sensory experiences through days out to local attractions; and
- A microcredit scheme operating in rural Zimbabwe for a network of young women, presented by Anne Cotton, Founder and Executive Director of CAMFED International, and 2004 UK Social Entrepreneur of the Year.

The event concluded with an open pledging session, when many in the audience gave generously to the projects presented. With Gift Aid the final sum raised from the event was over £20,000. CCF plan to host a second event in September 2005.

For more information on TFN Cambridge, contact Jane Darlington on 07941 226 778 or [jane@cambscf.org.uk](mailto:jane@cambscf.org.uk). For more information about CCF, visit [www.cambscf.org.uk](http://www.cambscf.org.uk), or for TFN national, visit [www.thefundingnetwork.org.uk](http://www.thefundingnetwork.org.uk).

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#### Acumen Fund CEO featured in TIME magazine

TIME magazine has profiled Acumen Fund CEO Jacqueline Novogratz in its 7 March edition, in an article entitled "Beyond Charity: Givers

Who Mean Business". In addition, *Fast Company* magazine (March 2005) features Acumen Fund's investment in bed net technology that combats malaria, as well as its public-private partnership with ExxonMobil, WHO, Sumitomo, and UNICEF. The articles are available on Acumen's website, [www.acumenfund.org](http://www.acumenfund.org). Acumen was also featured in the October 2004 issue of the *PhilanthropyUK Newsletter*.

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#### WINGS Director selected as Senior Fellow of the Synergos Institute

Gaynor Humphries, Director of WINGS, has been selected as a Senior Fellow of the New York-based Synergos Institute for three years. The programme, which began in 1999, engages Fellows in a range of peer-learning activities, including cross-national affinity group projects, field assignments with developing foundations, and independent research. The current cadre of 65 fellows and alumni come from 25 countries, predominantly developing nations in Africa, Asia, and Latin America. The fellowship is open to individuals who are current staff members of a grantmaking foundation, have extensive experience in a leadership capacity, and possess knowledge in one or more of the following areas: foundation formation, governance, programming, resource mobilization, and outreach. For more information, visit [www.synergos.org](http://www.synergos.org).

## ANNOUNCEMENTS

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#### Innovative philanthropy prize seeks nominations

The Mercator Fund is seeking nominations for the second annual Raymond Georis Prize for Innovative Philanthropy in Europe. The prize is awarded to an individual, organisation, or project that illustrates a "creative and innovative philanthropic initiative with a high impact result" and will express a strong belief in the role of Europe and European values in philanthropy.

The prize ceremony will take place in Budapest on 4 June 2005, on the occasion of the European Foundation Centre's Annual Assembly. The winner will receive an original piece of art chosen by Mr Raymond Georis. The 2004 prize winner was Ms Avila

Kilmurray, Director of the Community Foundation for Northern Ireland, for her work towards "peace and social solidarity both in her own country and in the Balkans with the YouthBank project". For more information, contact the Mercator Fund at [info@mercatorfund.net](mailto:info@mercatorfund.net) or visit the website [www.mercatorfund.net](http://www.mercatorfund.net).

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#### Venturesome recruiting new investment manager

Venturesome is recruiting an Investment Manager to assist the Director in developing the organisation as an innovative financial provider. This will include appraising applications, monitoring a portfolio of investments, and marketing its services.

The candidate must be passionate about the charity sector (ideally with relevant experience) and excel at client interaction whilst having strong financial acumen and an entrepreneurial approach, bringing sound judgment and creativity to this hands-on role.

Venturesome provides risk capital financing to charities and other non-profit organisations. A CAF initiative, Venturesome has committed £3.5 million to 50 charities since launch in 2002, and now has an investment fund of £4 million.

For an application pack, visit [www.prospect-us.co.uk/jobs](http://www.prospect-us.co.uk/jobs) or call 0870 224 1444. For more information about Venturesome, visit its website at [www.venturesome.org](http://www.venturesome.org).

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### UnLtd announces MBA internship programme, re-launches websites

UnLtd - the Foundation for Social Entrepreneurs - invites MBA students to apply for its 2005 MBA Internship Programme. The programme offers MBA students an

opportunity to either support consulting engagements, working alongside UnLtd Ventures, or to develop particular pieces of field research. Interns will receive customised training and mentoring from McKinsey & Co and Goldman Sachs Asset Management. The London-based programme will run for eight weeks in June-July. For more information, contact UnLtd at [mbainternship@unltd.org.uk](mailto:mbainternship@unltd.org.uk) or visit [www.unltd.org.uk](http://www.unltd.org.uk).

UnLtd has also re-launched its main website, [www.unltd.org.uk](http://www.unltd.org.uk), which now includes a searchable database of Award Winners, a new Tools & Resources section, and regional/country sections. UnLtd has also updated its Millennium Awards Fellowship website, [www.starpeople.org.uk](http://www.starpeople.org.uk), and its social ideas bank website, [www.unltdideasbank.org.uk](http://www.unltdideasbank.org.uk).

## PUBLICATIONS AND GUIDANCE

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### Institute for Philanthropy promotes the return of philanthropy in Britain

In her article, 'The Return of Philanthropy,' first published in the January 2005 issue of *Prospect* magazine, Institute for Philanthropy Deputy Director Beth Breeze argues that Britain should celebrate its Victorian tradition of philanthropy: "By celebrating our history of giving and explaining the difference that philanthropic contributions can make we could inspire the next generation of wealthy Britons, and reclaim our place as world leaders in philanthropy." Read the article at: [www.instituteforphilanthropy.org.uk/IFP%20he%20Return%20of%20Philanthropy.pdf](http://www.instituteforphilanthropy.org.uk/IFP%20he%20Return%20of%20Philanthropy.pdf).

The Institute also published a guide to seasonal giving in December, entitled *Oh yes you can!* The guide analyses reasons why people do not give and offers tips on ways through barriers to giving. Read the paper at <http://www.instituteforphilanthropy.org.uk/Oh%20yes%20you%20can.pdf>.

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### new economics foundation releases new SROI report, launches online tool

The new economics foundation (nef) has released a social return on investment (SROI) analysis of *Getting Out to Work*, a Tomorrow's People programme in Merseyside

that helps ex-offenders into long-term, sustainable employment. The report details the social outcomes and financial impacts of the programme. Additionally, in January nef launched, in collaboration with London Business School, the *SROI Primer*, a web-based audiovisual introduction to measuring social returns (<http://sroi.london.edu>).

Currently nef is working with a variety of organisations to develop SROI case studies, including social firms, community enterprise, microcredit, social housing, employment support, child care, recycling, and community arts; and is beginning to explore SROI with corporate CSR programmes and social investment funds. Additionally, the Adventure Capital Fund (ACF) is using SROI to evaluate public investment in social enterprise; while nef is working with several local authorities that are exploring using SROI in their procurement decisions.

SROI is one of a number of tools and approaches developed or co-developed by nef to capture economic, social, and environmental impacts. For more information on nef's Measurement and Evaluation portfolio of tools, or to access the *Getting Out to Work* SROI report, visit [www.neweconomics.org/gen/new\\_ways\\_top.aspx](http://www.neweconomics.org/gen/new_ways_top.aspx).

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### **New report on the future of philanthropy**

Global Business Network and Monitor Institute have released a new report, *Looking Out for the Future: An Orientation for Twenty-first Century Philanthropists*. The report explores the dynamic forces shaping philanthropy around the globe over the next decades, and offers specific action points and tools for philanthropists to examine their current charitable giving, and consider what they may do differently. Access the report at [www.futureofphilanthropy.org](http://www.futureofphilanthropy.org).

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### **CIVICUS releases new report on civil society**

*Assessing and Strengthening Civil Society Worldwide: A Project Description of the CIVICUS Civil Society Index*, a new report by CIVICUS, describes the framework and methodology the organisation used in developing its Civil Society Index (CSI), as well as discusses issues around conceptualising and assessing civil society in a comparative manner. The report can be purchased for \$3 for CIVICUS members and \$5

for non-members, plus shipping, from CIVICUS, at [info@civicus.org](mailto:info@civicus.org).

The CIVICUS CSI is a participatory needs assessment and action planning tool for civil society in countries around the world, which aims to create a knowledge base and impetus for initiatives that strengthen civil society. For more information, visit [www.civicus.org/new/CSI\\_overview.asp?c=FD8912](http://www.civicus.org/new/CSI_overview.asp?c=FD8912).

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### **WINGS releases example of chief executive performance appraisal**

WINGS has released a new case study to help grant-maker associations appraise the performance of their chief executives. Washington Grantmakers, a US association, has made available to the WINGS network its appraisal form for the association's president. The report may be downloaded (in pdf and Word) at [www.wingsweb.org/information/links\\_practitioners.cfm#staff](http://www.wingsweb.org/information/links_practitioners.cfm#staff).

## **FUTURE EVENTS**

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### **Carnegie Medal of Philanthropy 2005 to be hosted at Holyrood**

Previously hosted in the United States, the Carnegie Medal of Philanthropy will be 'coming home' to Scotland this year. The award ceremony, to be hosted at Holyrood, will feature an international symposium with six high-profile debates on the challenges of philanthropy in addressing various global concerns, such as poverty, education, and the environment.

The Carnegie Medal of Philanthropy, created in 2001 at the centennial observance of Andrew Carnegie's official career as a

philanthropist, is given biennially to one or more individuals who have "dedicated their private wealth to public good". The three main criteria are philanthropic vision; impact; and a sustainable track record. Previous winners include Lord Sainsbury, Bill Gates, George Soros, Ted Turner, and The Rockefeller Foundation. For more information, contact the Big Partnership: Alan Barr at 0141 333 9585 or Frances Donald at 01592 643 200; or visit [www.carnegieuktrust.org.uk/news\\_and\\_events/philanthropy\\_medals](http://www.carnegieuktrust.org.uk/news_and_events/philanthropy_medals).

## WHAT'S NEW IN SOCIAL INVESTMENT?

A brief round-up of developments in the social investment world

Prepared by the Charity Project jointly run by the Ethical Investment Research Service (EIRiS) and UK Social Investment Forum (UKSIF)

**The ART of social investment.** Sir Digby Jones, Director General of the CBI, has showed his personal commitment to social investment by becoming a personal investor in ART (Aston Reinvestment Trust), the Birmingham-based pioneer of CDFIs (community development finance institutions): [www.reinvest.co.uk](http://www.reinvest.co.uk).

**Bridges Community Ventures (BCV)** has released a report concluding that there is a need for a new kind of venture capital fund to provide equity-type capital to high-potential social ventures such as Oxfam's Progresso Cafes: [www.bridgesventures.com](http://www.bridgesventures.com).

**Charity Bank** has announced a new partnership account in association with Street (UK) foundation. The returns offered by the new StreetSmart account are higher than those offered by similar high street savings accounts, and the 2% interest earned on the deposits will directly benefit Street (UK): [www.charitybank.org](http://www.charitybank.org).

**Triodos Bank**, which celebrates its tenth anniversary this year, has reached the landmark of lending over £100million to organisations that benefit people and the environment: [www.triodos.co.uk](http://www.triodos.co.uk).

**Futurebuilders England** the £125million government investment fund announced the recipients of its first investment awards on 22<sup>nd</sup> February. It will publish statistics relating to applications received: [www.futurebuilders-england.org.uk](http://www.futurebuilders-england.org.uk).

**Money for Change.** With the introduction of community investment tax relief (CITR), CDFIs are attracting increased social investment, and can deliver both social and financial returns giving investors tax relief of 5% per annum. (CITRs provide a tax incentive to individuals and companies that invest in not-for-profit and profit-seeking enterprises in or serving disadvantaged communities): [www.cdfa.org.uk](http://www.cdfa.org.uk).

*If you require any further information on these stories or have a social investment news item please contact Adam Ognall, co-ordinator of the joint EIRIS and UK Social Investment Forum Charity Project, at [adam.ognall@eiris.org](mailto:adam.ognall@eiris.org).*

*The project promotes awareness of ethical and socially responsible investment amongst charities and assists them in developing and implementing a responsible investment approach.*

## FEATURE PROFILE

### New Philanthropy Capital: Raising the bar

“What does it mean when a charity turns a car thief into an AA patrol man? How can a donor know the impact a charity is having?” As Peter Wheeler considered this proposition posed to him by David Robinson of Community Links, he turned to his colleagues at Goldman Sachs for advice. Inspired by the challenge, they launched New Philanthropy Capital (NPC) in 2001 in an effort to “maximise the quantity and quality of charitable giving”, according to Nigel Harris, NPC Chief Executive.

#### Research and advisory

Today, NPC—whose funders include The Big Lottery Fund and Esmée Fairbairn—focuses on two main activities, research and advisory. Inherent in all its work is a commitment to doing what works best from the perspective of the charities’ beneficiaries. “We take a demand-side, as well as a supply-side, perspective”, noted Harris.

NPC carries out independent research and analysis on where and how donors can target their resources most effectively. Paralleling brokerage research, NPC’s in-depth reports combine sector and charity analysis; are evidence-based; assess outcomes; and make specific investment recommendations for donors. Unlike brokerage research, however, NPC makes its reports available for free on its website. Harris explains: “NPC was deliberately set up as a charity and not a for-profit consultancy. Our mission is to increase both the level and effectiveness of charitable giving, so we want to make our research as widely available as possible.”

Over the last three years, NPC has learned, through its research, much about the complexities of the voluntary sector. For example, its forthcoming reports on *Prisoners and Offenders* and *Truancy and Exclusion* highlight interconnected issues for young offenders. Moreover, NPC is in a unique position to tackle cross-cutting sector issues, such as cost allocation in funding, which it addressed in its Full Cost Recovery report.

Further building on its research, NPC also provides bespoke, fee-based donor advisory services to foundations, corporations, and high-net-worth individuals. Not surprisingly, NPC’s donor advisory services mimic those offered by wealth management firms. In addition to general strategic advice on

#### Trustee profile

##### David Robins, Chairman and Co-founder

*Background:* 25-year career in investment banking, principally at Philips & Drew and UBS; former Chairman and CEO of ING Barings. Current Chairman of Henderson TR Pacific Investment Trust and LCH Clearnet Ltd. Current Chairman of The Hackney Empire and Deputy Chairman of the East London Business Alliance (ELBA).

Growing up in Northeast England, David Robins witnessed people living in “desperate conditions” in Middlesbrough. He has since travelled and worked in Southeast Asia, mostly in developing countries, where he was exposed to more deprivation. Then, in 1995, he joined a Seeing is Believing tour hosted by Business in the Community (BITC), and felt compelled to act: “Working in East London, where poverty was on our doorstep, I thought ‘How can we not do something?’”

Inspired by this experience, Robins soon instituted the beginnings of a CSR programme at UBS, which joined ELBA (then known as the East London Partnership), and chose the St. Luke’s Hawksmoor church as its flagship project. UBS partnered with the London Symphony Orchestra to refurbish the church, with the aim of creating an educational space where disadvantaged kids could learn about music. Today, St. Luke’s is the home of LSO Discovery, the LSO’s community and music education programme.

When he moved to ING Barings in 2000, Robins successfully replicated these efforts. He remarked: “People in the City work hard at their jobs, because that is what they believe is expected of them... but when the Chief Executive tells you that it is okay to volunteer your time to charity, many people will come forward.”

Robins credits his parents with inspiring his philanthropy: “I come from a very strong socialist background. My parents instilled in me a belief in social values and equality of opportunity”. His private charitable giving also reflects personal experiences. Robins, whose mother died of a stroke 10 years ago, does a major walk each year to raise money for Connect, a national charity that helps stroke victims. However, he admits that, overall, his charitable giving is “probably not as effective as it could be;” but, with the help of NPC’s research and analysis, he intends to “raise the bar” on his own philanthropy.

## Trustee profile

### Nigel Morris, Trustee

*Background:* Co-founder, ex-President and COO of Capital One. Currently on the board of the Economist Group, London Business School, and Quanta Holdings.

NPC's newest Trustee, Nigel Morris returned to London in 2004 after 20 years in the US, where he created and ran one of the greatest success stories in the financial services industry, Capital One. While he implemented its well regarded CSR programme—Capital One has been ranked as one of the best places to work both in America (*Fortune*) and in the UK (*The Sunday Times*)—Morris had not focused on his personal philanthropy.

Since returning to the UK, Morris and his wife have spent time looking at various models, to “see where we could have the most impact on the charitable sector... we are seeking to effect change on a tremendous scale, and so are focusing our resources on a few charities, where we can make a difference with both time and money.” Morris, who was once a social worker in East London, and his wife primarily support charities, such as NSPCC, that help children at risk.

Inspired by US venture philanthropy, Morris was also keen to become involved in ‘new philanthropy’ in the UK, and sought an opportunity to effect “systemic change in philanthropy”. He elaborated: “Philanthropy is a harder sell in the UK than in the US, owing to differing sensibilities about charitable giving.” Morris found NPC compelling for its “world-class research” that can “both inform and inspire giving”, and was impressed with the management and trustees, who he describes as “imaginative, committed, and replete with high energy.” Morris concludes: “I am excited to be a part of NPC as it moves to the next stage and becomes a change agent for charitable giving in the UK.”

metrics will you use to measure that value? Our research will not only increase donors' confidence in giving, but also will help ensure that their funds are channelled to the most effective charities.” NPC Chairman David Robins agrees: “There currently is a lack of transparency in the voluntary sector. Donors often are not given the desired feedback or opportunity for involvement. Consequently, they do not feel engaged and appreciated.”

Yet Robins believes that a culture of giving does exist in Britain. “People are generous for the right issue”, he added. Indeed, the compassionate response of the British public to the Asian Tsunami disaster is clear evidence of this, as is *The Guardian's* Christmas charity appeal, which raised an estimated £250,000 in 2004 for charities helping the elderly, which were researched and recommended by NPC. NPC believes that it can nurture this culture of giving by bridging the information gap between donors and the voluntary sector. “We are knowledge creators and information providers”, said Harris.

approaching philanthropy,

NPC also helps donors choose among sectors as well as specific charities by establishing a process for philanthropy. In its first three years NPC advised on £20 million in donations.

### Inspiring philanthropy

Through its work NPC hopes to inspire more philanthropists by helping them find the ‘right’ charities—those that touch them personally—and by increasing their confidence in the organisations they choose to support. Nigel Morris, an NPC Trustee, elaborated: “We want to make it fashionable for donors to ask the right questions, such as ‘How will the funds be used?’, ‘What value will be created?’, and ‘What

## Donor profiles

### Execution Charitable Trust

In November 2002, Execution Ltd, a London-based equity brokerage, held a charity trading day, converting all commission revenues to charitable funds. After raising £547,000 to support small community based projects, the company approached NPC for advice on where its funding could be used most effectively. Using NPC's research and advice, Execution Charitable Trust chose 14 projects in the UK. As a result, the charities have hired much needed case workers, extended their services, and are helping to improve the lives of many disadvantaged individuals. The charity trading day was so successful that the company held its third event in November 2004, again distributing funds raised to charity with the advice and support of NPC.

### Individual philanthropist

An entrepreneur with £1 million to give to charity approached NPC for advice because he was impressed with NPC's investment approach and sector research. Relying on NPC's counsel, he donated unrestricted funds to 12 UK and international charities; that is, his donations were not tied to a specific project. For example, he donated £100,000 to Family Action in Rogerfield and Easterhouse (FARE), a small charity working to help the most vulnerable people on the Easterhouse estate in Glasgow. The donation enabled FARE to move out of its cramped building and relocate to a new purpose-built centre suitable for the elderly, disabled, and parents with young children.

## Audacious goals

Looking forward, NPC plans to actively broaden its client base. To date NPC's advisory services have focused on donors who have £100,000 or more to give away, but the organisation believes it can now reach "further down the wealth spectrum", helping individuals seeking to donate around £10,000 to charity. NPC also hopes to work more closely with corporate CSR programmes to develop employee giving schemes. In exploring new marketing and distribution models, NPC is again turning to the financial sector for inspiration. Could the UK soon see its first charity mutual fund?

Undaunted by the challenges presented by these audacious goals, NPC intends to stay true to its mission; and, in so doing, will continue to raise the bar for charitable giving in the UK.

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