

EUSCEA
SEMINAR
Liblice, April 24th, 2008



Fundraising for science events



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Title: "Fundraising for science events"
Lecturer: Jordi Mas

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Contents

- 1. What is happening outside?
- 2. How strong we are?
- 3. Build a convincing case.
- 4. Know your objectives.
- 5. Allocate your resources towards your goals.
- 6. How much are you going to spend?
- 7. Who is going to do what? And when?
- 8. Communicate your "ask": what do you offer for what?
- 9. Communicate to the ones you want to reach.
- 10. Negotiate your deal, your contract.
- 11. Monitor the agreements.
- 12. Follow-up and evaluate.

- 1. Introduction & General Concepts
- 2. Strategic analysis
 - 1. External analysis: Sources
 - 2. Internal analysis
 - 3. Which is your case?
 - 4. Needs and objectives
- 3. Fundraising planning
 - 1. Budgeting
 - 2. Scheduling
 - 3. Communication
- 4. Fundraising operations
 - 1. Sponsors during the activity
- 5. Monitoring and evaluation
- 6. Conclusions
- 7. Give-me game

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 **Introduction**

- Some general concepts
 - Definitions
 - Scope of fundraising for a science activity
 - Sources: individuals, companies, foundations, administrations
 - Types of funding: cash, in-kind, others
 - Legal issues: Tax deductions, accountability, contracts
 - Local / International perspectives

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 **From wikipedia**

- **Fundraising** is the process of soliciting and gathering money or other gifts in-kind, by requesting donations from individuals, businesses, charitable foundations, or governmental agencies. Typically refers to efforts to gather funds for non-profit organizations.
- To sponsor something is to support an event, activity, person, or organization financially or through the provision of products or services. **Sponsorship** may be an arrangement to exchange advertising for the responsibility of funding a popular event or entity.

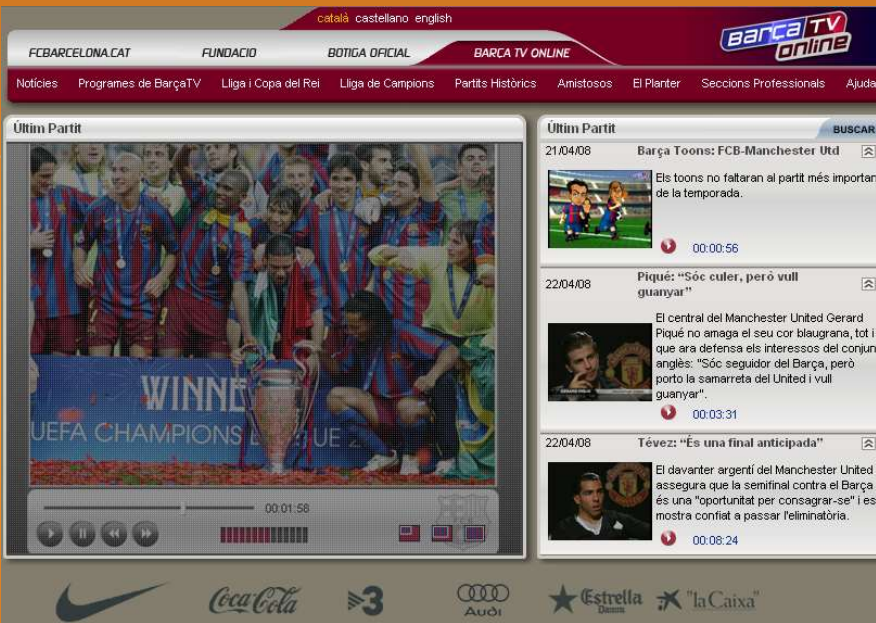
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Fundraising is a hard job...

- It is easier to fundraise for a program helping abandoned children in Somalia than for a science activity explaining physics to children from local schools.
- It is easier to sponsor a popular soccer team than a science event involving Nobel Prize laureates.

• ***DO YOU AGREE?***

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The screenshot shows the FC Barcelona website interface. At the top, there are navigation links for "FC BARCELONA.CAT", "FUNDACIO", "BOTIGA OFICIAL", and "BARÇA TV ONLINE". Below this is a search bar and a list of menu items: "Notícies", "Programes de BarçaTV", "Lliga i Copa del Rei", "Lliga de Campions", "Partits Històrics", "Amistosos", "El Planter", "Seccions Professionals", and "Ajuda".

The main content area is titled "Últim Partit" (Latest Match). It features a large video player showing a group of players celebrating with a trophy. The video player has a progress bar at 00:01:58. To the right of the video player is a list of recent matches:

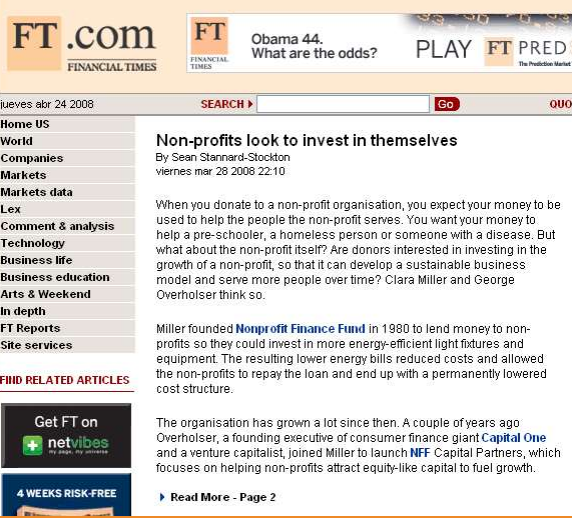
- 21/04/08** Barça Toons: FCB-Manchester Utd
Els toons no faltaran al partit més important de la temporada.
00:00:56
- 22/04/08** Piqué: "Sóc euter, però vull guanyar"
El central del Manchester United Gerard Piqué no amaga el seu cor blaugrana, tot i que ara defensa els interessos del conjunt anglès: "Sóc seguidor del Barça, però porto la samarreta del United i vull guanyar".
00:03:31
- 22/04/08** Tévez: "És una final anticipada"
El davanter argentí del Manchester United assegura que la semifinal contra el Barça és una "oportunitat per consagrar-se" i es mostra confiat a passar l'eliminatória.
00:08:24

At the bottom of the page, there are logos for Nike, Coca-Cola, 3, Audi, Estrella Damm, and la Caixa.

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FT.com FINANCIAL TIMES

Obama 44. What are the odds? PLAY FT PREDICT

Tuesday, Apr 24, 2008 SEARCH Go QUOTE

Non-profits look to invest in themselves
By Sean Stannard-Stockton
Friday, Mar 28, 2008 22:10

When you donate to a non-profit organisation, you expect your money to be used to help the people the non-profit serves. You want your money to help a pre-schooler, a homeless person or someone with a disease. But what about the non-profit itself? Are donors interested in investing in the growth of a non-profit, so that it can develop a sustainable business model and serve more people over time? Clara Miller and George Overholser think so.

Miller founded **Nonprofit Finance Fund** in 1980 to lend money to non-profits so they could invest in more energy-efficient light fixtures and equipment. The resulting lower energy bills reduced costs and allowed the non-profits to repay the loan and end up with a permanently lowered cost structure.

The organisation has grown a lot since then. A couple of years ago Overholser, a founding executive of consumer finance giant **Capital One** and a venture capitalist, joined Miller to launch **NFF Capital Partners**, which focuses on helping non-profits attract equity-like capital to fuel growth.

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Read More - Page 2

WHILE YESTERDAY'S DONORS WERE CONTENT TO GIVE TO A NON-PROFIT BASED ON AN EMOTIONAL APPEAL, TODAY'S DONORS WANT TO KNOW THEIR MONEY IS REALLY GOING TO HAVE AN IMPACT.

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What do they think?

The state of corporate philanthropy:
A McKinsey Global Survey



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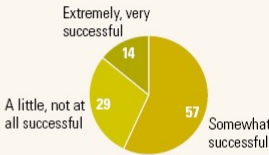
In addition to the social benefits of your company's corporate philanthropy programs, which, if any, of the following business goals does your company try to reach with those programs?

% of respondents,¹ n = 721

Enhance corporate reputation and/or corporate brand	70
Build employee and/or leadership capabilities and skills	44
Improve employee recruitment and/or retention	42
Differentiate itself from competitors	38
Manage current or future risk	19
Build knowledge about potential new markets or products	16
Inform areas of innovation for existing products, services	15
Meet industry norms	12
We do not try to reach any business goals with our corporate philanthropy programs	12

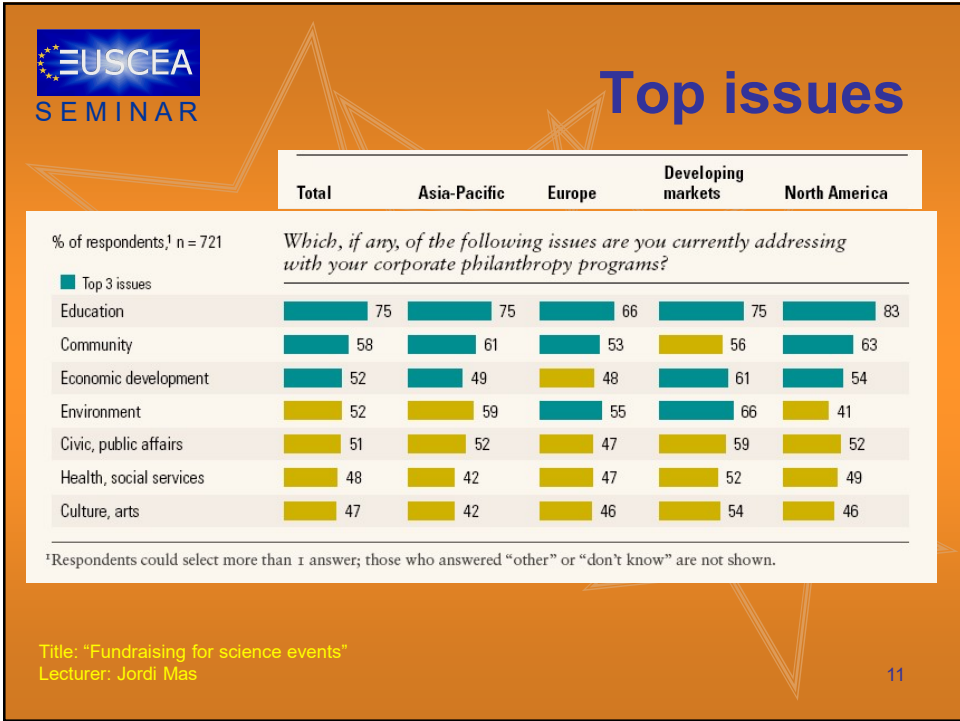
How successful have you been at achieving these goals?

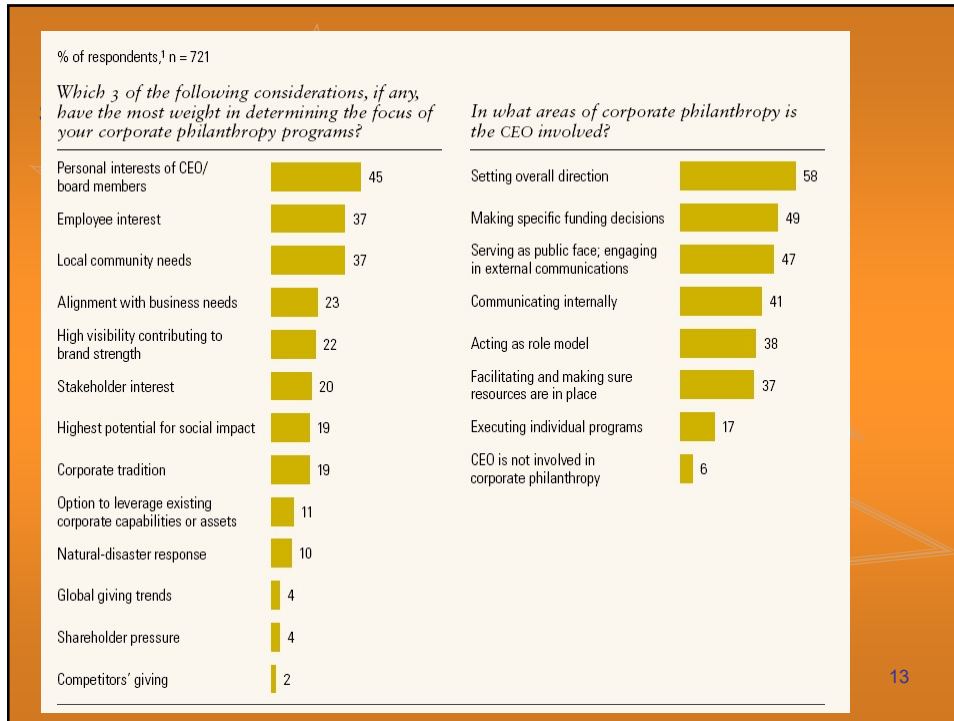
% of respondents, n = 638



¹ Respondents could select more than 1 answer; those who answered "other" are not shown.

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Benefits for Donors

- Long-term strategic benefits
 - Recruitment of staff is facilitated since the donor organization has been shown to “care”
- Community expectations
 - Donations that enhance community relations
- Employee responsibility
 - Articulate the social responsibility of employees
- Enhancing the bottom line
 - If the company “cares”, key customers may enhance sales

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EUSCEA SEMINAR External analysis: PESTEL

<p>POLITICAL FACTORS</p> <ul style="list-style-type: none"> Attitudes of government Changes in government Activities of pressure groups 	<p>ECONOMIC FACTORS</p> <ul style="list-style-type: none"> Business cycles Interest rates Inflation Economics trends: by sector
<p>SOCIO-CULTURAL</p> <ul style="list-style-type: none"> Consumer life-styles Consumption patterns Demographic patterns Content of school education Social networks 	<p>TECHNOLOGICAL</p> <ul style="list-style-type: none"> ICT development Development of new materials New mobile communications New media
<p>ENVIRONMENTAL</p> <ul style="list-style-type: none"> Major polluters Deteriorating landmarks Environmental legislation Recycling 	<p>LEGAL FACTORS</p> <ul style="list-style-type: none"> Legal framework Recent legislation: database management Fiscal framework Tax deductions

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EUSCEA SEMINAR Internal analysis SWOT

STRENGTHS (org.)	THREATS (env.)
WEAKNESSES (org.)	OPPORTUNITIES (env.)

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Activities portfolio

Internal appropriateness

High Moderate Low

External attractiveness

High

Moderate

Low

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Vertical axis

<i>External attractiveness (issues)</i>	Weight (sum 1,0)	Rating (1-10)	Value
Level of public concern			
Likely trends in public concern			
Numbers of people aided			
Immediacy of impact on beneficiary group			
TOTAL			


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Horizontal axis

<i>Internal appropriateness (issues)</i>	Weight (sum 1,0)	Rating (1-10)	Value
Level of previous experience	□	□	□
Perceived importance of the activity	□	□	□
Compatibility with mission	□	□	□
Possession of unique expertise	□	□	□
TOTAL	□	□	□

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Activities portfolio

Internal appropriateness


High Moderate Low

	High	Moderate	Low
External attractiveness	High	Moderate	Low
	<i>easy</i>	<i>easy</i>	<i>evaluate</i>
5,6	<i>easy</i>	<i>evaluate</i>	<i>evaluate</i>
Low	<i>evaluate</i>	<i>evaluate</i>	<i>difficult</i>

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5,3

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Your case

- Why does the organization exist? The answer lies in the human or social problem or need addressed by the nonprofit. This is the organization's mission, its *raison d'être*.
- What services or programs do the nonprofit provide to meet the need or solve the problem?
- Why should prospective donors (individuals, corporations, foundations) provide funds, and what benefits accrue to donors who make gifts?

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Objectives

- Specific
- Measurable
- Achievable
- Results-oriented
- Time-determined

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Human resources

- Good interpersonal skills
- A proactive mindset
- Simplicity and understanding
- A thirst for knowledge
- Articulateness and perceptiveness

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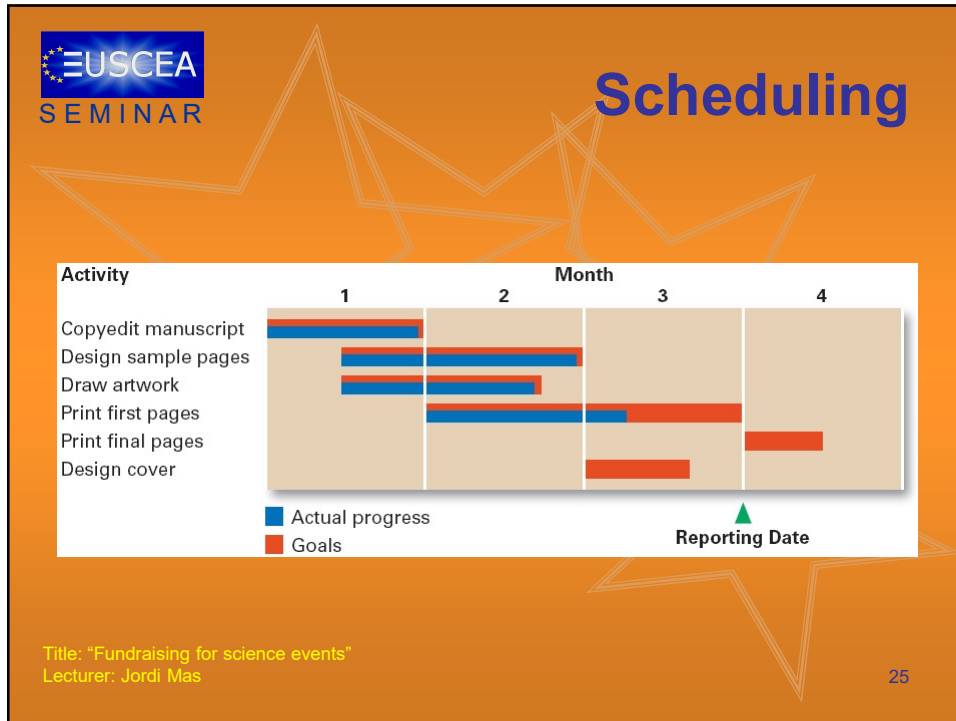
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Budget

- Your costs
 - % to fundraise from the general budget of the activity depends mainly on your ambition
 - Fundraising budget (10%) of amount to raise
- Their costs
 - Total costs
 - Out-of-pocket expenses
 - Opportunity costs
 - Other costs

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Communication

- Personal contact, visit
- Personal letter
- Personal phone call
- Direct mail / email
- Media
- Fundraising event
- Internet based channel
- Mobile media

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	ESOF2008 SPONSORS CATEGORIES			
	PLATINUM >200.000€	GOLD >100.000€	SILVER >20.000€	BRONZE <20.000€
DIRECT IMAGE BENEFITS				
Website				
Logo at sponsors section (categorized)				
Profile of company/institution				
Sponsor of the month				
Printed material				
Logo of Programme Book				
Logo at brochures, posters, panels, etc.				
Advertisement in Programme Book (1)				
full-page				
half-page				
quarter-page				
Name of Programme Book				
Name at brochures, posters, panels, etc.				
Leaflet of company/institution in bag (1)				
Opening and Closing ceremonies				
Company/institution name mentioned				
Logo of panel on the scenario				
Name of panel on the scenario				
EXHIBITION				
Stand location at 1st floor (entrance)				
Stand				
Free space (sqm)	36	16	9	
Stand of reduced price	30%	30%		
Presentation of Exhibition Programme				
PERSONAL BENEFITS				
Number of free registrations to ESOF2008	28	10	2	1
Number of invitations to the ESOF2008 Party	60	25	1	2
Number of passes to the VIP Area	28	10	7	1

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Corporate donor matrix

- Giving Potential axis (horizontal)
 - financial performance
 - attitude of directors
 - giving policy
 - past record of giving, etc.
- Donor's Interest in a particular organization
 - similarity of mission.
 - similarity of target audiences,
 - the need for favorable publicity
 - local interest

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Vertical axis

<i>Interest potential (issues)</i>	Weight (sum 1,0)	Rating (1-10)	Value
Similarity of mission			
Similarity of target audiences			
Need for favorable publicity			
Local interests			
TOTAL			

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Horizontal axis

<i>Giving potential (issues)</i>	Weight (sum 1,0)	Rating (1-10)	Value
Financial performance			
Attitude of directors			
Giving policy			
Past record of giving			
TOTAL			

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Corporate portfolio

Giving potential

High Medium Low

Interest potential

High	max attention	max attention	worth contacting
Medium	max attention	worth contacting	forget
Low	worth contacting	forget	forget

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Fundraising Operations

- Clear message, customized
- Materials to communicate
 - Printed: Brochures, dossiers, etc
 - Digital: web, CD, DVD, etc.
 - Dossier elements/parts
- Ways to communicate
 - Personal visit, letter, email, phone call
 - "The elevator pitch"
- Negotiations and agreements (contracts)
- Keep track of contacts status

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Sponsors during the activity

- Benefits agreed in place?
- Accompanying person
- Logos visibility
- Inauguration ceremony
 - Public recognition by authorities
- Press conference, press release
- VIP reception
- Take photos and videos
- Webcast activities; videos; podcasts
 - Sponsor ad

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Monitoring and evaluation

- Return on investment (ROI) analysis
- Reporting sponsors
- Photo album
- Preparing for next edition
- News dossier
 - Where sponsor was mentioned!
- Thanks letter; ad

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Conclusions

- Conclusions
- Checklists
- Glossary
- Directory of funding organizations

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Foundations, Trusts

1. Audit of Potential Projects
2. Initial Trust Search
3. Network Search
4. Prioritization and Matching of Prospects
5. Selection of Contact Strategy
6. The Application

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Application: pitfalls

1. Not reading the requirements.
2. Providing too much/too little information.
3. Poor Presentation.
4. Not making the ask!
5. Follow Up

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Directory

About the EFC | Contact us | Sitemap

Search



Promoting the work of foundations and corporate funders in Europe and the World

- Who we are
- About the EFC
- Membership
- Services and programmes
- EU Affairs
- Foundation Law Matters
- AGA and Conference
- Knowledge Resources on and for Funders
- Philanthropy Institute Programme (PIP)
- European Forum on Philanthropy and Research Funding
- International Fellowship Programme
- Region-Focused Funders Networks
- Thematic Funders Networks
- Community Philanthropy
- EFC Photo Competition
- Publications

> For grantseekers

SAVE THE DATE!

19th Annual General Assembly (AGA) and Conference
Fostering Creativity
May 29th - 31st 2008 - Istanbul, Turkey

EFC News




Jury announces finalists of 2008 EFC Annual Photo Competition NEW
(April 21 2008)
The jurors of the 2008 EFC Annual Photo Competition have announced the finalists in this year's edition. The photos will be displayed at the 19th EFC AGA and Conference taking place on May 29th - 31st in Istanbul. At the conference, delegates will vote for their favourite photo. The winner will be announced at the conference's closing plenary. [> full story](#)

Registration closed for EFC annual conference NEW
(April 14 2008)
Due to unprecedented numbers, EFC has had to close registration for its AGA and Conference taking place next month in Istanbul. We are now running a waiting list for those still interested in attending. [> full story](#)

EFC announces plans to create European foundation database
(February 29 2008)
EFC and GuideStar International Ltd. have signed an agreement to cooperate on a three month study aimed at determining the feasibility of creating a European Foundation Database. [> full story](#)

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Upcoming events

EFC Annual General Assembly (AGA) and Conference, May 29th-31st 2008

[See all events](#)

Latest documents

EFC - Inside the Slovenian Presidency

Financial Times reports on 'Understanding Global Philanthropy', 11th December 2007

[See all documents](#)

Latest jobs

Human Resources Officer, EFC

[Writer/Communications](#)

SEARCH EUROPE'S ONLINE PHILANTHROPIC COMMUNITY



What's On?

- ▶ [European Foundation Centre Annual General Assembly and Conference, June 1st – 3rd 2007, Madrid, Spain](#)
- ▶ [Visit the EFC's What's Going On...](#)

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Please note that these webpages are not accessible using Firefox or Netscape


Ab

For Grantseekers

Thank you for your interest in the European Foundation Centre (EFC). The Centre is a membership association of foundations and corporate funders that supports the work of its members.

- The EFC does not give grants or any kind of financial support
- The EFC does not provide services directly to grantseekers

Grantseekers might find the following resources useful.

EFC Advice for Grantseekers

In an effort to assist its members in receiving more targeted, relevant applications for grants, the EFC has produced this brief guide for grantseekers on how to approach foundations and corporate funders for support.

>Download EFC Advice to Grantseekers (pdf 127kb)


EFC Resources

- [Funders Online](#): (free of charge to the public) The EFC online public information service on independent funding. It offers access to the websites of more than 500 foundations and corporate funders. The current focus of the directory is Europe, i.e. included are only foundations and corporate funders based or active in Europe. Through the Funders Online advanced search tool you can search for foundations and corporate donors that support activities in your field of interest and work. www.fundersonline.org
- The EFC Bibliographical Database, which includes around 1000 electronic and other resources regarding philanthropy and the third sector in Europe and worldwide.
 - >Download a list of funding directories held in the EFC Bibliographical Database (pdf 193kb)
 - >Download a list of books on fundraising held in the EFC Bibliographical Database (pdf 168kb)
- [EFC Funding Directories](#): (free hard copies are available for EFC members only) These book-length publications contain detailed profiles of foundations active in Europe that outline their mission, background, geographical focus, programme areas, types of grants and application procedures.

Other Resources

Websites on Fundraising

- [The Resource Alliance](#) (formerly known as The International Fund Raising Group)
- [UK Fundraising](#)
- [Funding Digest UK](#)
- [The Grantsmanship Center](#)
- [Tactical Technology Collective](#)
- [Foundation Center](#)
 - Individual grantseekers
 - FAQ for individual grantseekers
 - Non-U.S. grantseekers
- [Global Development Networks](#)



Give-me game

- Participants are provided with EUSCEA-bank notes
 - Participants-group A (20): 10.000€, 1.000€ and 100€
 - Participants-group B (5): 50.000€, 5.000€ and 500€
 - Total amount available for fundraise: 499.500€
 - Each person is identified with a "PD" (potential donor) badge with a color code
 - Colors depending on the type of sponsor
- Seminar participants should ask for funds to the PD ("elevator pitch") during the rest of the day
- PDs fund the proposals they prefer with the amount they prefer (sponsor identity should be kept)
- The winner is the participant that gets more funds for his/her activity. Results at the end of dinner...

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5+20 Potential Donors

<p style="font-size: 2em; font-weight: bold; color: yellow;">BILL GATES</p> <p style="font-size: 0.8em; color: white;">POTENTIAL DONOR</p>	<p style="font-size: 0.8em; color: white;"><i>President</i></p> <p style="font-size: 1.5em; font-weight: bold; color: yellow;">CHEMICAL COMPANY</p> <p style="font-size: 0.8em; color: white;">POTENTIAL DONOR</p>	<p style="font-size: 0.8em; color: white;"><i>Marketing Dtor.</i></p> <p style="font-size: 1.5em; font-weight: bold; color: yellow;">AUTO- MOTIVE INDUSTRY</p> <p style="font-size: 0.8em; color: white;">POTENTIAL DONOR</p>
<p style="font-size: 0.8em; color: white;"><i>Communication Director</i></p> <p style="font-size: 1.5em; font-weight: bold; color: yellow;">TELECOM</p> <p style="font-size: 0.8em; color: white;">POTENTIAL DONOR</p>	<p style="font-size: 2em; font-weight: bold; color: yellow;">YOUR CITY MAYOR</p>	<div style="display: flex; flex-direction: column; align-items: center; gap: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: red; border-radius: 50%;"></div> <div style="text-align: left; font-size: 0.8em; color: white;">LOCAL COMPANY</div> </div> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: green; border-radius: 50%;"></div> <div style="text-align: left; font-size: 0.8em; color: white;">INDIVIDUAL DONOR</div> </div> </div>

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 **EUSCEA** bank notes

 **EUROPEAN BANK OF SCIENCE EVENTS**
50.000 euros
Liblice, April 2008

Collect as many as you can!

 **EUROPEAN BANK OF SCIENCE EVENTS**
5.000 euros
Liblice, April 2008

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 **EUSCEA**

**It's all about
personal
relationships**

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The poster features a solid orange background with several faint, white, multi-pointed star shapes scattered across it. In the top left corner, there is a blue rectangular logo with the text 'EUSCEA' in white and 'SEMINAR' in blue below it. The central focus is a white rectangular box containing the following text: 'A FORUM FOR LEADING SCIENTISTS, YOUNG RESEARCHERS, POLICY MAKERS, BUSINESS PEOPLE AND JOURNALISTS' in small black letters; 'EUROSCIENCE OPEN FORUM' in large black letters; 'ESOFF 2008' in very large, bold red letters; 'SCIENCE FOR A BETTER LIFE' in large black letters; and 'BARCELONA, JULY 18-22' in large black letters.

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EUROSCIENCE OPEN FORUM
ESOFF 2008
SCIENCE FOR A BETTER LIFE
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