



Fundraising Guide

A Resource for **Philanthropists**



Fundraising

A practical introduction
for Philanthropists

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Foreword

Dear reader,

For many wealthy individuals, making money comes naturally. Learning how to give it away however, in an effective, strategic, impactful manner is for most a complex undertaking. We aim to help make this journey simpler.

In so doing, we reached out to our Global Philanthropists Community, an exclusive members-only network, supported by UBS, for leading philanthropists and social impact investors, to ask them what are the greatest challenges they faced with their philanthropy. Over half told us that their foremost challenge was finding philanthropic partners, co-donators, and funding collaborators.

For many, the Community can help to mitigate this issue by connecting active philanthropists with similar interests to share best practice and encourage collaboration to drive even greater impact. However, we are hearing more and more the question of how to raise additional resources. How can a philanthropist fundraise.

This guide has been created to help answer that question. There are numerous publications, websites, and resources available to support professional fundraisers in securing support from companies, governments, institutions and indeed wealthy individuals, but there is little in the way of support for philanthropists themselves who wish to leverage their position, network, and their capital to raise further funding.

This fundraising guide has therefore been built with philanthropists in mind. Philanthropists that might:

- have their own foundation for which they wish to secure additional support
- have a particular passion and wish to mobilise their networks to co-donate with them in a particular project, geographic location, or theme.
- have an (un)official role with a third party organization for whom they wish to leverage funding

Consistently ranked as the leading global bank for philanthropy, UBS is in a unique position to use its networks, resources, and expertise to contribute to the ever evolving philanthropic landscape.



A stylized, handwritten signature in black ink, appearing to read 'Silvia Bastante de Unverhau'.

Silvia Bastante de Unverhau
Head of Philanthropy Advisory

1. Initiate

Fundraising is not to be underestimated; it can be a challenging, time consuming, and even costly undertaking. However, with proper planning and a sound strategy, it can bring significant, cost effective returns to your or your partner's organization.

One thing that is clear is that fundraising should start long before any ask is actually made, as the importance of a proper plan of action is key. The more explicit your ultimate goal and the more carefully planned your tactics, the easier it will be to make the right choices, approach the right funders, and present your case in the most appropriate manner.

For some philanthropists fundraising can be quite a daunting prospect, not knowing where to begin, who to approach and how to actually make the ask. Raising donations, often for no tangible return, does require significant thought and takes careful planning.

There are many things to consider when thinking about fundraising, but two are worth mentioning right at the very start: how much time can you dedicate to your fundraising and how much do you want to raise. As a rule of thumb, the more you want to raise, the more time you will need to invest. The below three case studies are examples of this.

Low demand, low return

High demand, high return



Philanthropist A Case Study

Background: A wealthy widow with her own foundation that supports youth organizations in her home city.

Need: A non-profit needed \$1m for the redevelopment of a youth center. She wanted to donate \$500,000 and raise \$500,000 from friends for her own foundation to donate to the project.

Strategy: She worked with the non-profit to organize a single fundraising event at the youth center. She agreed to invite all the guests, cover all costs, and match all donations up to \$500,000 via her foundation. The non-profit agreed to undertake the entire organization of the event.

Outcome: Over \$500,000 raised

Philanthropist B Case Study

Background: A wealthy entrepreneur and his partner from a diaspora community living in a foreign country.

Need: A humanitarian crisis developed in their ancestral home land and the couple wanted to raise funds by leveraging their networks to mobilize support for those affected.

Strategy: They organized a series of intimate fundraising events inviting peers from their network. Each event was tailored to suit different audiences, catering to the cultural differences amongst their peers. Each event focused on a different theme of the crisis (e.g. refugees, water, health).

Outcome: Over \$1.2m raised

Philanthropist C Case Study

Background: A successful hedge fund manager with his own philanthropic foundation that supports social enterprises.

Need: After years of successful support of social enterprises, he wanted to leverage his network and position to help raise \$15m to increase his foundation's reach and impact.

Strategy: He understood the time needed to successfully execute a fundraising drive would be too demanding and that his best assets were his networks and name. He chose to invest \$120,000 in a fundraising professional to work with him to build a strategy and lead the campaign.

Outcome: \$15m reached

1.1 Why do you want to fundraise?

The first question that needs to be answered is why do you want to fundraise. What is the reason behind wanting to raise capital from others, when you yourself could, in the eyes of others, simply donate at a greater level. Being able to answer this question is key to you being able to engage supporters, because it is guaranteed that it is a question they will also be asking themselves.

An important point to note at the start is that simply because a person is wealthy does not mean that they are obligated to be philanthropic. Likewise, simply because they are connected to you does not necessarily mean that they will support your fundraising drive. So spending time thinking about why you are fundraising is crucial.

The below chart details some possible answers, but this is a question that only you can really answer.

I want to fundraise because ...

I want to achieve scale

The key reason many wish to raise further funds is to generate growth and increase the scale or reach.

I want to make it sustainable

You may have sufficient funds to give yourself, however, encouraging others to give too can help to ensure longevity and sustainability of the work.

I need other resources that I do not have

Fundraising need not just be limited to funds. Other resources can be immensely important depending on the cause (e.g. cargo space for shipping, marketing avenues, products, expertise).

I want to reach the contacts of my contacts

You will have your own network of individuals to whom you can reach out, but those contacts naturally have their own networks. They may also be able to open doors that you cannot (e.g. diplomatic or government connections).

I believe that others will be able to bring additional ideas to the table

As with business, philanthropic work is easier with more minds behind the target goal; getting others involved can facilitate innovation, generate new strategies, etc.

I would like to raise awareness

Being recognized for your philanthropy benefits not only you but also the cause you are championing. Crucially, it also helps to raise awareness of philanthropy itself, helping to generate a culture of giving through inspiring others to follow your lead.

1.2 Why would they donate?

Once you have answered the question of why you want to fundraise, the second point to consider is why would another support your philanthropic aims. To answer this, you first need to flip the table and think about why you would support another's philanthropic work.

What is it that they would want from you (e.g. funds, network, expertise), what pitch would work to bring you on board and what would you want in return? Being able to put yourself in the shoes of your target audience is the backbone of your future fundraising efforts.

They will donate because ...

I have earned their trust

You will have earned the trust and respect of your networks, perhaps through your business or personal activities. Your audience will translate this trust into your philanthropic methodology. One cannot underestimate the power of being asked by a peer; many will find it hard to say no.

I will make giving simple

Effective philanthropy is challenging. It requires time, research, planning, and crucially an avenue to facilitate it. Eliminating these hurdles by doing the background work, undertaking the due diligence, assessing the potential impact, and creating a simple mechanism to give can be a powerful persuasion tool.

I will show them a powerful cause they do not know about

You may be fundraising for a specific cause or project about which not everyone is aware. Opening their eyes to this topic and conveying your passion can be a powerful motivator.

I will offer them unparalleled networking opportunities

Philanthropy can be an open and collaborative social undertaking, providing a forum to bring people together for a common cause.

I will provide an attractive forum to donate

Not everyone will give purely out of altruistic tendencies, some may be motivated by being seen to give or for the enjoyment of the giving process such as an auction at an event or some other exciting method.

2. Plan

Before starting any fundraising activities, it is important to take a step back and use the opportunity to look at your philanthropic work as a whole. Are your vision, your mission, and your ultimate strategy clear? Are they simple for others to understand?

This step is key for your future fundraising activity as it will help you develop a fundraising plan and call to action that can be easily communicated to potential donors

Further reading

The UBS Philanthropy Compass is a tool developed to help philanthropists, either at the start of their journey or further down the line, to formulate a vision and mission and define an overall strategy. The Compass has been designed as a working tool which can ultimately help individuals and organizations find their own answers. Developed by UBS, FSG and CASS Business School, it addresses several topics such as forming your vision, finding organizations and projects to support and involving partners. The Compass is available in 7 languages and can be accessed at no cost on the UBS Philanthropy Advisory website.

2.1 Define your desired outcome and goal

As with any project, the best way to commence your fundraising activity is to visualize what the desired end goal should be. In a philanthropic context, that can be both a simple and complex task as the outcomes

typically have a range and any amount of funding will be of benefit. So set yourself a financial target which is linked directly to the tangible result that will be created by this funding.

While defining your fundraising goal, you should ask yourself:



Once these questions have been answered, you can start to work your way back and understand how to achieve your goal.

2.2 Where are your strengths?

Having thought through these questions, it is worth taking a step back and considering what your strengths are, who you have in your network and where your assets lie in order to help focus your time and energy where they will secure the greatest return.

According to the type of funds you are looking for, your network, your background, and your objectives, you might decide to reach out to different types of potential donors. Whatever your choice is, you will need to find out what their triggers and motivators are and plan the most appropriate approach.

Questions to help you realize your strengths:

Who do you know?

Friends, family, peers, partners, clients, colleagues

What are your own personal and professional strengths?

Do you have a particular standing in a certain area or industry where you hold influence which you can leverage?

What is your call to action?

Why now and why you? What is it that is instigating this fundraising drive and what is the time limit?

Who do you have behind you?

Are you partnering with a larger organization which could leverage your funds to match that of their own fundraising activities?

What other options can you give?

Other than funding, what other options can you give to increase the chance of securing a yes? Having more than one option gives you a backup should your first request be turned down.

2.3 Whom could you approach?

Once you have established where you want to be, you need to look at who is going to help you get there.

The below table depicts the three main areas and provides a basic look at their suitability for a private philanthropist.

Funding sources	Decision making power	Ease of application & reporting	Donation speed
<p>Philanthropists: Engaging other private philanthropists with your cause is perhaps the most natural way to achieve your fundraising aims. Opening and engaging your network and peers to co-donate with you should be a priority. Fundraising can also be a strategic way to build your personal and business network, giving you the opportunity to reach out to those you do not yet know, but would like to.</p>	High	High	High
<p>Corporates: Most larger companies have a social budget which they typically assign to non-profit organizations that align with their business objectives. The bigger the company, the more robust their selection criteria and this pot of funding is often under great demand from professional fundraisers. Going straight to the decision maker of the firm will be your strength, however, they will be under pressure from other stakeholders to ensure fair distribution of funds. Offering reasons to access other budget lines such as Marketing, HR, Innovation etc. may make the approach more successful. Consider also sponsorship opportunities or other activities that will generate publicity.</p>	Medium	Medium	Medium
<p>Grant giving organizations: Many grant giving entities assign a portion of their budget to philanthropic activities and some use that funding in ways that seek to leverage further funding from the private sector. Understanding where these pots of funding are and how to access them through matching opportunities can bring many benefits such as publicity and recognition. There are also a number of grant making organizations, both public and private, that fund specific philanthropic causes. Similarly to the above, such organizations are a focus for professional fundraisers, so thinking innovatively and going straight to the decision maker could be your strength.</p>	Medium	Low	Low

In Chapter 3 of this guide, we will look further into how to engage these funders and discuss specific approaches that a private philanthropist could implement to solicit funding or access resources.

2.4 What could they offer?

Other than direct donations, there are other ways donors may offer financial support:

- **Non-monetary contributions:** When collaborating with companies, think about what else they could bring to the table: resources such as human capital, logistics, merchandise, venues, etc.
- **Real, personal and/or intangible property donations:** Funders may offer to gift real estate, vehicles, art or non tradeable securities. These offers need to be fully researched as depending on the nature of the offer and your ability to turn it into cash, they may present more challenges than the offer is worth.
- **Revenues:** This is where funds are raised through the sale of a retail product, where a portion of the cost is allocated to philanthropic means. Many examples exist and are a common way for companies to secure publicity and drive sales alongside generating funds for their social contributions.
- **Loans:** Loans are much more frequently used in the for profit sphere than among non-profits. However, new innovative funding mechanisms involving debt characteristics are emerging. Innovative funding models are addressed in greater detail in chapter 3.
- **Equity:** Equity capital refers to money that third parties decide to provide in return for an ownership stake in the organization. Funds won't be repaid, but if the organization turns out to be successful, the supporter might get a share of the rewards.

2.5 What activities could you undertake?

So far we have looked at defining your end goal, *whom* you could approach, *what* types of funding sources there are, and *where* your greatest strengths lie.

Now you will need to consider *how* you will go about fundraising and what activities you could put into action.

How will I raise funds...

By taking a peer to peer approach

You can never underestimate the power of asking a peer face to face to participate in your philanthropic aim. And yet, for many it is perhaps the most challenging, simply because it is the most personal and the prospects are often private relationships. Planning the approach ahead of time is crucial. The success will depend on whether you manage to choose the right approach for the right type of person. More about this is covered in chapter 3.

By organizing events

Events are a common tool in the non-profit world as they support in building a prospect base, in gaining and retaining donors, and in raising funds. Events do not always need to center on fundraising but can primarily be informative or a celebration of achieved results. In any case, events provide you with a stage to promote your cause and inform about the approach you or your organization chooses. Remember that events can be cost, time and labor intensive. Events are covered further in chapter 3.

By maximising relevant media channels

If seeking to engage a younger generation or reach out to a wider public audience, social media can be an asset, allowing your audience to receive and share your message and thereby become advocates of your cause. Engaging philanthropists and business leaders, social media can, if used effectively, also create a public image of a private group, giving recognition to its members and making it appealing to others. It can also provide a forum to facilitate discussion. Using the right tool for your audience is naturally integral.

Through capitalizing on a commercial activity

Typically fundraising involves soliciting financial or resource donations. However, there are many examples of those who have brought in a commercial element to their fundraising such as selling products in support of their philanthropic objective. This can be a hugely innovative area in raising funds and can bring many benefits such as sustainability, publicity, and scale, but it can also be time and resource intensive.

Through establishing a credible website

A well developed, user friendly website inspires confidence, trust, and credibility. It is a platform to tell the story with the aid of videos, stories and pictures. A professional website is a simple, fast and relatively cheap tool to have in your arsenal. It should be a dynamic source of information, engaging existing and persuading potential donors through providing information relevant to their needs. Websites need to be clear and engaging, giving regular updates, information about the aims, how to get in touch, what the funding needs are, and how to support.

2.6 Define your action plan and develop your materials

Now that we have looked at where you want to be, what funding is available, where your greatest strengths lie, and how funds are typically elicited, you can start to work on your plan and budget.

It is a misconception to think that you can simply invite your peers to a dinner and ask them to put their hands in their pocket without a robust plan. That might well generate some funds, but it has been done many times before and will not generate the higher return you naturally wish to achieve.

Your fundraising will be as successful as the time put into its planning. If you take the time to think about your plan of action, your strategy, the ask moment, and the income vs expenditure projections, the outcome, of perhaps the same dinner, will most likely be higher.

2.6.1 Developing your pitch and identity

Before getting into the technical details of writing your fundraising plan and budget, start by crafting a donor facing proposition, a one pager that details the cause that you are supporting, and a passionate reason for why you have chosen to champion it.

Here you need to think about what your value proposition is, why your offer is better than others, and what impact is sought through your activities. This needs to be clearly thought through as donors are becoming ever more focused on the bottom line and outcomes.

This is an iterative process and will inevitably be revisited and revised throughout your fundraising journey. However, doing this at the start of your process will help you formulate in your own mind why you are doing this before looking at the technicalities of how you can do it.

2.6.2 Writing your fundraising plan

Putting your fundraising plan in writing will help you consolidate everything you have worked through up until this moment in a structured manner.

Formulating it in this way not only helps you to be clear in your own mind on how you will achieve your aim, but it also enables you to identify potential weaknesses and opportunities.

The following is a structure that can be adopted:

Plan overview

This section is a summary of your fundraising plan. It should be concise, and include your aim and vision together with a brief overview of your objectives, funding need and goal, and a brief description of the strategies you will use. It should also highlight what the funding will be used for (e.g. for emergency aid in Nepal).

Income and expenditure

This section outlines the fundraising need and the costs involved with reaching that target. Here it is good to think about and in turn highlight what your financial contribution will be.

A good way to structure it is:

- a) What is the amount of funding needed? \$ _____
- b) What will be the expected expenses incurred? \$ _____
- c) How much will you contribute financially? \$ _____
- d) Total funding needed \$ _____

The following section goes into more detail about writing your budget.

Implementation

This section specifies from where funds will be raised and how, covering who the target audience will be and the process by which funds will be elicited. This will need to cover the strategies that you will employ to solicit donations, such as holding events or partnering with a company to raise capital from a product.

Target audience

This looks at who will be targeted and how, by whom, and when they will be approached. It can also detail key background information to enable you to answer the aforementioned questions. This section need only be topline information. A separate more robust spreadsheet detailing names, companies, foundations, etc. would be a vital working document to have as part of your ongoing fundraising activities.

Calendar

This section can take the form of a chart or calendar detailing the schedule of activities, milestones, etc. This needs to be ambitious, with strategies being aimed for and not necessarily already set. This then forms the basis of a separate sheet that can be used as a live document that enables you to track and monitor your progress alongside the items that need to be undertaken to get you there. The following is an example of a table that can be used.

Strategies	Goal	Audience	Description	When	Support	Cost
Gala dinner	\$20,000 50 guests	Family, friends	Fundraising event at home	May 15	Staff, board	\$5,000
Product launch	\$50,000	General public	Partnership with company	August – December	Company, staff, board	\$2,000
Private lunch	\$40,000– \$100,000	Mr. John Doe	One on one lunch	September 26	None	\$100

2.6.3 Writing your budget

Your fundraising goal should be linked to a budget. This represents the gap between your needs (expenses) and your resources (revenues). It clearly states what amount of money you need to raise, what it will be used for, and the costs incurred to get you there. It needs to be clearly aligned with your vision and mission. Start with the goals you defined in the first step, and ask yourself what those will mean for you on both the revenue and expense side.

On the *expense side*, you should for instance budget funds for the activities (e.g. projects) but should not forget about the administration costs (e.g. resources, staffing, structural costs, implementation fees). Even if you choose to cover all the expenses yourself, it is still worth tracking so that you can learn and improve alongside providing an ROI (return on investment) figure which can be used for evaluation purposes. This figure can also be a powerful tool for demonstrating the efficiency of your work to potential funders.

On the *revenue side*, you should consider your existing resources (e.g. revenues from capital, recurring revenues) and also make a forecast. This should cover your prospects and the percentage likelihood they are to give and at what level, the target for any fundraising events planned, the expected return on any products marketed, etc.

Wealthy individuals, companies and institutions are always being approached for donations. Try to be realistic when building your budget and learn from what others have achieved in the past.

Practical considerations

- ✓ **Involve others**
Involving others at an early stage can help not only to raise new ideas but also crucially to create stakeholders in the end goal. Perhaps look to involve family members, get a perspective from another generation, approach your business partners for a strategic view or your peers who may have undertaken similar work previously, etc. All of these can also be future donors; getting their advice early on shows you value them and their opinion, making the ask later on much easier.
- ✓ **Be clear**
For many partners and supporters a clear, concise, logical, and detailed financial argument is key to their engagement. You should therefore aim to prepare a clear picture of your financial planning. List your expenses and revenue forecasts in a genuine and transparent manner, and state explicitly the assumptions you make when deriving the numbers.
- ✓ **Think of resources**
Fundraising is costly. Not always financially, but it can require a significant amount of time, which for many is the greater commodity. A clear understanding of the desired outcome, accompanied by a robust plan, will help define the resources needed in terms of manpower, time, and money in advance.

If your planned activities are too demanding for you to manage given other priorities, it might be more cost-efficient to hire a professional fundraiser. In selecting such a person, remember that people donate to people, and that this person will be representing you to your peers.
- ✓ **Use positive messaging**
Philanthropy is a pleasurable activity and in turn fundraising messaging should be full of hope and positivity. Research shows that through positive messaging donors are motivated to give more than through negative messaging.

For example, a well-known aid organization ran two media campaigns for a nutrition project in sub-Saharan Africa. One depicted images of starving children and the second depicted images of the positive impact of its rice growing programs. The second raised more funding as it inspired hope and asked donors to partner with the beneficiaries, not help them. Any communication needs to convey hope and positivity, demonstrating that there is an issue, but also describing the impact you and they could achieve together.
- ✓ **Show the overheads**
Non-profit organizations seek to, and are expected to, work ever more effectively and efficiently and in turn funders are becoming more appreciative of the fact that overheads are a vital part of the equation. Many philanthropists choose to cover all expenses as their contribution, so they can say 100% of funding goes direct to the beneficiaries. A good way to highlight this to donors is to say that you will match a percentage of their gift to ensure it is administered and spent in the most effective way possible and its impact monitored.

3. Implement

The following chapter aims to give you practical advice on the different questions you come across upon implementing your fundraising plan. Until now, you have taken basic decisions on your funding sources and methods given your organization's needs and capacities.

Fundraising is about planning, but equally importantly about relationships. You should first make the potential funders interested in your cause, secure their buy in, convince them to give, thank them, and carry on building that relationship so that they might give again.

An interesting point to note is that the Fundraising Effectiveness Project (FEP)¹ found that the donor retention rate today is 39%, with a respective attrition rate of 61%. This means that a typical non-profit will lose 61% of its donors between the first and second donation. Reasons for this can be as simple as not saying thank you or not reporting back on a donation (i.e. what was achieved).

No one is obligated to make a donation, however wealthy they are or however strong their link is to you or the cause, so making them feel valued and giving them the sense of the impact of their support is essential.

¹ AFP and The Urban Institute (September 2013), The Fundraising Effectiveness Project

3.1 Attract people to donate to your cause

As previously mentioned, your greatest asset is your existing network. This will be where you start building your prospect list including those such as family, friends, colleagues, peers, clients, etc.

However, turning them into donors to your cause takes time and effort. The most important thing is the ability to fully understand your audience on an individual basis as everyone has a different trigger. Know their motivations, drivers, fears, priorities, etc. Only by putting yourself in their shoes will you be able to inspire them to give.

3.1.1 Understanding the motivations to give

Even though many of those you will approach will already be known to you, take the time to truly understand them before making any request for funding. Adapting your style and approach to suit their character type will generate higher returns.

One thing that everyone, regardless of background, has in common, is that as humans, we like to feel valued and we like to be heard. Therefore, ask questions, let them do the talking, and listen. The more you know about them the better you can tailor your ask. Allowing them to talk gives you time to analyze their motivations and triggers, which will give you the tools you need to provide an ask that fits with their beliefs.

There are many philanthropic impulses. We have listed here the most common:

Not wanting to say no to a peer

One cannot underestimate the difficulty of saying no to a friend, family member or peer when asked to support something close to their heart. Although this isn't an impulse per se, it is a reason why people give.

Motivated by their religion or strong family values

All the world's major religions encourage benevolent deeds to relieve poverty and suffering, and support those less fortunate. Additionally, many individuals are driven by strong family values and ethics.

Being a true altruist

Giving purely to help others without personal interest.

A personal or professional interest

For example, they may have specific expertise in a related field or have had a life experience that helps them relate to the cause. They may also be motivated from a practical point of view (e.g. tax benefit or lack of heirs).

Having a business benefit

As individuals, being linked with others through a common cause builds instant rapport which can translate into a professional relationship. From a corporate point of view, being seen to do good is good for business.

To create a legacy

To leave a lasting positive image of themselves for the next generation.

The desire for recognition

To create a positive image of themselves during their lifetime.

Wanting to belong to something

Networking, being included in a certain circle of individuals, being seen, etc.

It is worth noting that few fall simply into one specific category, usually it is a mix and being successful in fundraising is understanding what levels of each category forms the makeup of your prospect.

3.1.2 Understanding the motivations not to give

After having looked at the reasons why people are motivated to give, it is just as important, if not more, to look at why

people choose not to give. Understanding these perspectives will help you to craft your responses in advance.

There are also many compulsions not to give:

They may already be otherwise engaged

Most people have a cause they are passionate about, it may not necessarily be the same as yours.

They might prefer to lead their own work

Many individuals become philanthropists having made their own wealth through hard work and entrepreneurialism. When it comes to their philanthropy, they like to do their own thing and apply their business skills to their philanthropic work, sometimes believing that they can do it better.

They may have so called 'donor fatigue'

A wealthy individual, foundation or company with a public image typically receives many requests for support. They cannot help everyone.

They might have strong views

Some have strict beliefs about certain issues and believe certain issues are not theirs to champion but someone else's (e.g. government, private sector, those affected).

3.1.3 Influencing the decision making process

Having thought about the reasons why people do and do not give, the next step is to engage and influence the decision making process of the potential donor.

There are four effective ways to influence your prospect:

The emotive presentation

Appealing to the heart. Using stories that bring the cause to life and positioning your solution as the key solution that can improve the situation.

The rational presentation

Appealing to the head. Explaining the impact that their funding would have using logical fact-based information. Presenting your answer as the obvious and natural, solution to the issue at hand.

The collaborative presentation

Appealing to their pride. You cannot achieve the outcomes you need without their joining you. Offering three options for them to get involved.

The advisory presentation

Appealing to the ego. There is a saying, ask for funding and you get advice, ask for advice and you get funding. This isn't always the case, but seeking advice shows you trust and respect the individual and attracts them as stakeholders.

This isn't to say that you employ only one of above at any one time, but a mix depending on the audience.

After thinking about the various types of presentation available to you, there are six key pointers that will help you use them in the most effective manner:

1. **You have what they want:** Fundraising isn't begging, it is the facilitation of philanthropy
2. **What are the top 3 things you want:** Is it funding, gift in kind, advice, connections, etc.
3. **Put yourself in their shoes:** What would you want and how would you like to be asked
4. **Plan for their questions and arguments:** Have your answers and counter arguments ready
5. **Listen to their opinions and stories:** Relate your argument to what they have said
6. **Be flexible:** But stick to your core aims

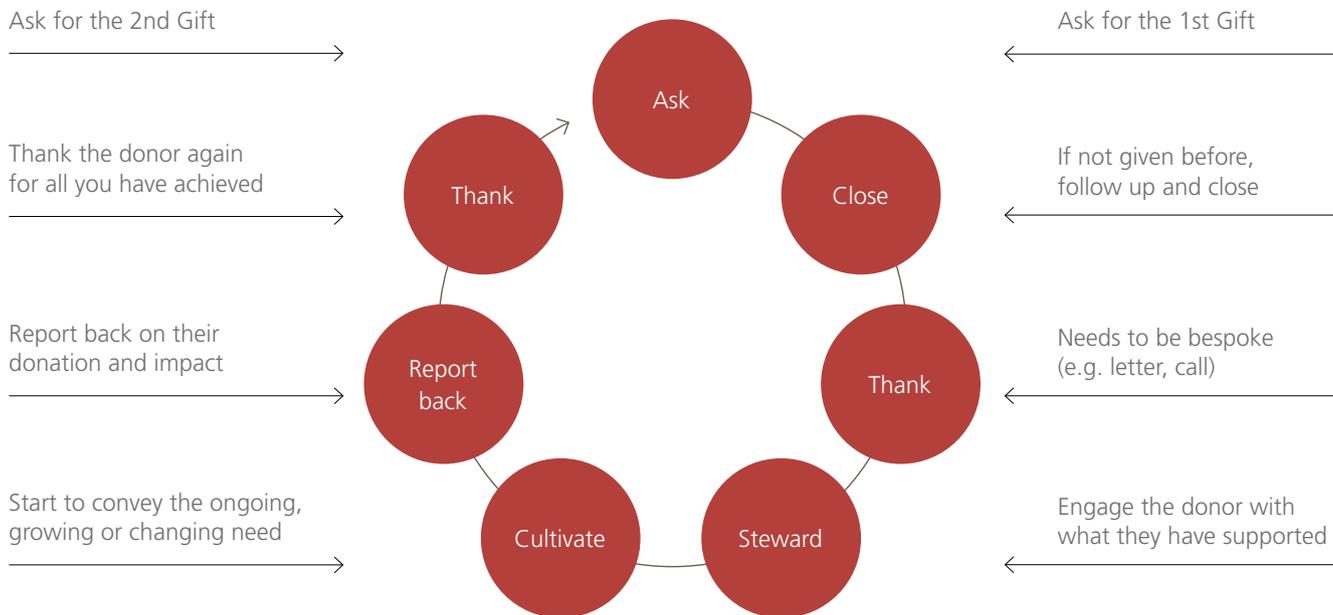
3.1.4 Donor retention

As mentioned at the beginning of this chapter, it is important to keep your donors engaged with your activities and valued as part of the success of the activities in question.

Not only is it more cost effective and efficient to ensure that a donor gives again than trying to source new ones for each

fundraising drive, but demonstrating your appreciation will also set you apart. In addition, many of your prospects will be those who are known to you personally, so you naturally want to ensure that your fundraising improves these relationships rather than tarnishes them.

A simple way to think about how to retain donors is to consider using the circle of giving approach:



Send updates on your efforts and showcase that you are using their money effectively. Be as bespoke as possible, illustrate how their gift in particular has helped your cause and have them feel part of the effort. Last but not least, refrain from making an ask every time they hear from you.

Practical considerations

- ✓ **Network to build your donor base**
Your network may already be extensive, but use this exercise to make new connections, grow your network, and build bridges with those previously not in your circle of influence. Philanthropy can be a valuable tool in opening doors.
- ✓ **Make it simple**
However complex your cause and ultimately your ask, make it as clear, simple, and digestible as possible. In Chapter 2.6.1 you looked at developing your pitch and identity, and it was highlighted that this was an iterative process. Revisit this and try to condense it down to an A4 page, then a paragraph, and finally a sentence. The simpler your pitch is to understand, the more likely people are to support you. People do not donate to things they do not understand.
- ✓ **Make giving easy**
Being philanthropic isn't top of everyone's priority list. Enable your prospects to contribute easily, so it isn't something they have to go away and find time to do. Have a specific bank account and a detailed, yet simple pack with the payment details.
- ✓ **Offer something in return**
Although the act of giving does not necessarily require an expectation to receive, offering something in return can help persuade the potential donor. This can be a visit to see the work in action, a thank you letter from someone special, an invitation to a key event, a form of recognition, and, without exception, information on the impact their support has had.
- ✓ **Communicate the donor's long-term value from the outset**
A common misconception for fundraisers is to leave it too long before asking for a second gift. Feeling that they need to be grateful with that one-off gift, they miss the opportunity of making the donor themselves think of the even greater value they might provide. Timing is important here, not too soon, not too late.
- ✓ **Ask for feedback**
Listening to what your donors have to say will not only provide you with valuable information on what you need to improve (on impact, communications, donor interaction, etc.) but will also make them feel that you value their mind as much as their check book.
- ✓ **Create a recognition platform**
Most successful major donor fundraising campaigns have involved some kind of naming opportunity such as a list of donors on a website or the naming of a building, program, or product. Others have involved an official post, be it a committee, board, patrons group, ambassadors, etc. This is not only a way to further engage large donors, but also to make them stakeholders in the success of the initiative. This also enables you to have something tangible to 'sell' and you may choose to assign a specific sum attached to joining this group (e.g. \$100,000 per annum for a three year period).
- ✓ **Be mindful of the name of your foundation**
It is important to note here that if you are a philanthropist fundraising for your own foundation, donors may be put off if the foundation is named after you, regardless of the cause it supports. In this instance, consider other options such as asking them to donate directly into the beneficiary organization with funds being matched by your own foundation or setting up a separate entity with a more impartial name.

3.2 Engage with different types of funding sources

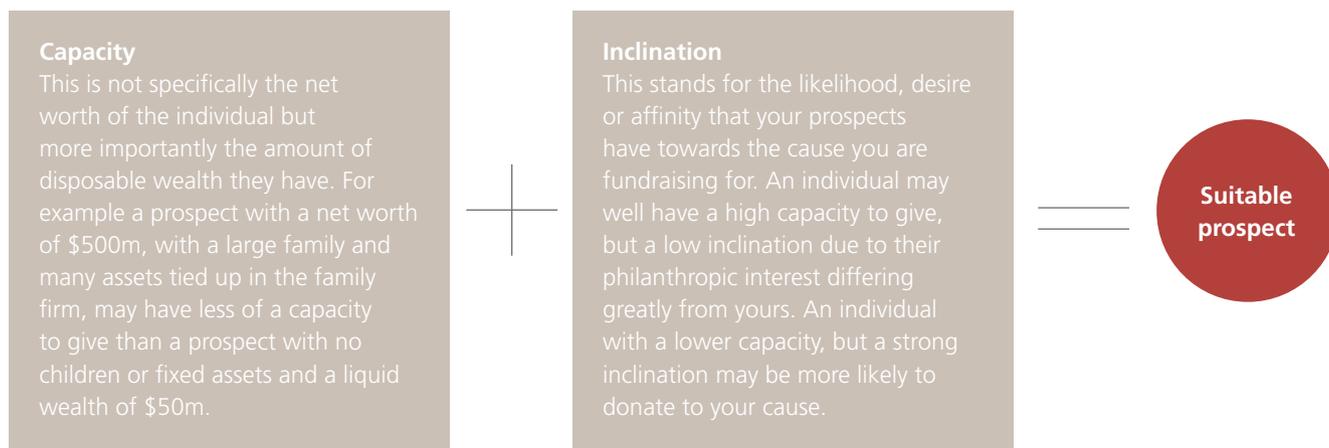
3.2.1 Philanthropists

In the non-profit sector, the term Major Donor defines individuals whose personal financial contribution constitutes a significant percentage of an organization's overall income. Organizations can afford to spend more time on looking after these individuals as the return makes it worth the investment.

A golden rule for non-profits is to follow the *80/20 Principle*, more commonly known in the business world as *Pareto's Law*, which means that 80 percent of their funding should come from 20 percent of their donors. The 20 percent are their Major Donors who provide the most cost effective form of income. Major Donor philanthropists should therefore also form the core of your fundraising drive.

When seeking to engage Philanthropists in your cause, you need to think about who is a good prospect and in whom you will invest the time to cultivate. Earlier on in this chapter we looked at philanthropic impulses, now we need to look at what makes for a suitable prospect.

A suitable Major Donor is categorized by two key elements: their capacity and their inclination to give.



3.2.2 Corporations

The engagement of corporations in your cause will differ from your fundraising efforts that you apply when involving individual donors. The reason is that whilst the donor motivations we discussed might also be true for a business, their main incentive to get involved is typically a different one.

Most companies have a desire to be socially responsible, but need to see a benefit to the business as well. It has to make good business sense. In fact, there is evidence that non-profit organizations could be much more successful in raising corporate funds if they managed to leverage these factors more strategically, focusing on mutual benefit. As an individual raising funds, you may find you have more flexibility on this front.

As mentioned in Chapter 1, the larger the company, the more rigid and structured their social funding. They will most likely have an individual or team who follow strict criteria on how to conduct the company's giving in a way that aligns with the strategy of the firm. Simply being a listed company does not necessarily mean that they will support every ask they receive.

There will also be a difference between a privately and a publically owned company in terms of the decision making process. Your greatest asset will be your ability to go directly to the business owner or company leader and discuss ways of developing a mutually beneficial partnership.

Approach with options; if not aligned to their Corporate Social Responsibility budget, think of targeting their marketing, HR, communications or innovation budgets. What could you offer in return and how could it benefit the company? Understand their business and tailor your offer accordingly.

Corporations need to be very careful with every contribution they make as they will need to justify their giving decisions towards their shareholders. The criterion that matters most to them is an alignment of an organization's mission with their goals. Be aware that the chief decision maker may have others to whom they need to justify their decisions too, so even if they are a close friend of yours, they may not be able to say yes, so make it easy for them by making your asks bespoke to their needs.

Philanthropist D Case Study	Analysis
<p>Philanthropist D founded a high end tailoring retail chain which he sold to a Private Equity firm. He has currently no further involvement with the firm but is still highly respected and connected. He is also a trustee of a young offenders organization, something he is passionate about being a father himself and believing that no child is born an offender.</p> <p>Having financially supported the organization for many years, he decided that he wanted to leverage his contacts in order to fundraise for the organization to help it reach its 10 year growth projections.</p> <p>He developed a prospect list and individual strategies for each prospect. An example strategy was to invite one prospect, the owner of a top fashion label, to join him on a visit to a prison to meet the young offenders, as he realized that although he was passionate about the cause, not everyone would be, but by meeting the young people, that passion may be ignited.</p> <p>Post the visit he presented the individual with a business concept that would generate both income for his firm and for the non-profit. The concept was for the contact to produce a bespoke tie whereby 20% of income would go to the non-profit. The initiative raised over \$300,000 for the non-profit in 3 years alongside significant publicity for the cause.</p>	<ol style="list-style-type: none"> 1. Identified a cause that he was passionate about 2. Partnered with an existing organization 3. Created a prospect list from his network 4. Understood that others may not have the same passions as he does 5. Built bespoke strategies for each prospect 6. Targeted this individual with a proposition that would benefit him as well as the organization 7. Income realized

3.2.3 Grant giving entities

This area of funding is likely to be the most challenging for a philanthropist to access. Foundations, trusts, or other entities such as government institutions follow a clearly defined mission guiding their grant-giving decisions.

Such institutions, be they public or private, define grant priorities each year that are based on their overall long-term mission but accommodate potential changes in strategy. They then typically publish guidelines that outline their strategic focus for the upcoming year but also define what a grant seeker needs to deliver in order to be considered.

The application process is typically very rigid and time consuming and large numbers of professional fundraisers will be competing for the same funding. On the other side of the equation, the reporting requirements on any donation received is typically even more rigorous than the application process and again, professional non-profit organizations will have more resources to dedicate to meeting these requirements.

However, the rewards can be large so they are worth giving some consideration to and seeking ways to access these funding pots via non-traditional methods (e.g. looking at offering to match grants made by a grant giving entity, leveraging further income, partnering with a third party organization with greater resources to dedicate to the application and reporting procedure).

Practical considerations



Make it personal

Major Donor fundraising is about people, both on your and your prospect's side. A funder is often motivated to donate to a cause, first due to the person presenting to them the cause, and second due to the cause itself. Each donor will support for different reasons and each wants their interaction to work for them. Their inclination to donate larger sums depends on your ability to translate your "offering" in a language that appeals to them.



Offer ways to be featured

Reputational benefit is one of the biggest incentives for a company to get socially involved, but can also be a powerful motivator for philanthropists and grant giving entities. As with the case study of Philanthropist D, think of ways how you could prominently feature a donor's support in your own communication channels and more widely.

Let your partner state their ideas about where and in what way they would like to be featured. Accommodating requests of this kind will not only constitute a valuable win-win situation but might actually help you prospect other donors.



Think beyond cash

Maybe there are products and services that a company could offer for free or at a discounted price. Service providers could help to bring your expenses down, those in the retail space could supply products for generating revenue, those in logistics could supply transport or those in the entertainment industry, venues, catering, etc.

3.3 Ways to engage

There are various ways that you can actually implement the ask and various models of facilitating the flow of funding. Choosing the right one for you depends on time, personality type, desired outcome, cultural suitability, and target audience. This chapter will not be able to cover all alternatives as innovation in this space is key to being successful. It will however cover three generic areas.

3.3.1 One on one

This will come as no surprise, but identifying your key prospects and meeting with them on a one on one basis to solicit their support is extremely powerful. More than two thirds (69%) of philanthropists will consider making a donation if the request to do so comes from someone they know and respect, compared to less than a third (31%)² when approached by a professional fundraiser.

Prior to such a meeting, plan for what you want to get out of it and have three possible asks to propose to the individual. Typically if someone says no to your first and second request, they will say yes to the third. So give them options. In such meetings, however well you know the person, ask questions, allow them to talk, and listen. Then adapt your approach accordingly, inspiring them with your passion for your chosen cause. Also consider the cultural background of the individual and tailor your style and wording to suit what they would be accustomed to and what they would find acceptable.

How you actually make the ask varies according to each person. This all depends on how well you know them, what personality type they are, their background, etc. With a professional fundraiser this stage is simpler as the individual has accepted the meeting knowing the job title of the individual, so if there isn't an ask, or an obvious lead to a future ask, made in the meeting, the fundraiser arguably hasn't done their job properly.

However, for a philanthropist asking another philanthropist, this objective isn't so clear. This is why the judgment of character, listening and asking questions are of paramount importance as they will allow you to know how best to phrase the ask. Letting them know in advance why you are meeting will also help set the foundation for the meeting.

² The Guardian "Five Ways Charities Attract Rich Donors" 15.05.2014

3.3.2 Events

Events are used in one form or the other by almost all non-profit organizations and are worth considering as part of your fundraising activities.

Philanthropist E Case Study	Philanthropist F Case Study
<p>Background: Philanthropist E had founded a successful oil and gas business and was well respected in the industry, he also had a philanthropic interest in supporting disadvantaged youth.</p> <p>Strategy: After a number of years supporting a youth non-profit, he decided he wanted to help the organization achieve greater scale. He made an offer to the non-profit that he would underwrite an event for 300 people and if they organized all the logistics, he would get the guests into the room.</p> <p>The non-profit developed a list of the wealthiest people in the oil and gas sector and related industries and crafted an invitation letter to be signed by Philanthropist E. They jointly agreed it would be a ticketed event as the key means of raising funds but that there would also be an auction at the dinner of items that he would source from his network.</p> <p>Outcome: Turned into an annual gala event raising circa \$2m each year.</p>	<p>Background: Philanthropist F was the third generation owner of a global shipping firm. After travelling to India he was moved by the plight of street children and sought advice from his philanthropy advisor as to how he could help.</p> <p>Strategy: He set up a foundation with a clear focus and started analyzing non-profit organizations that operated in a way aligned with its vision and mission. After extensive due diligence, he chose four organizations with whom it would partner with.</p> <p>He then hosted an intimate dinner on the deck of one of his ships, for 15 guests with the necessary philanthropic capacity and inclination. At the dinner a projector was set up with live video link to each of the four non-profits in India to talk about their projects. He asked each guest to donate CHF150,000 per annum and become a Patron of the foundation.</p> <p>Outcome: The 15 guests all pledged to become Patrons and help introduce others in the future.</p>
Analysis	Analysis
<p>Partnered with an established organization to help reduce the impact on his time and benefit from their expertise in organizing events. He also used his influential name to reach an audience beyond his own immediate network.</p>	<p>Sought advice and undertook extensive due diligence before commencing. He organized a unique and intimate dinner that sold the projects to the guests in a creative way. He asked them to become partners, not just funders.</p>

While events can be a great way to introduce potential donors to your cause, raise funds or thank existing supporters, they need to be carefully planned so as not to have the reverse effect by appearing too extravagant or not properly representative of the cause in question. Ensuring that events are executed to a high standard can mean that they become time consuming and expensive.

Part of the plan should be a budget, taking into account all costs associated with the event so that you can monitor whether at the end the funds raised over the cost involved were worth the effort.

The first consideration is the type of event you want to hold. Do you want to introduce people to your cause: cultivation, do you want to raise funds: fundraising, or do you want to thank existing donors: stewardship. What is the objective and what is the key outcome you want to achieve? You can mix styles to capture a wider audience and secure multiple outcomes, but one type will need to remain the principal aim.

One key point is to let guests know what the objective of the evening is, both via the invitation and again at the start of the event. You do not want guests turning down an invitation to a stewardship event thinking they will be asked for funding and likewise you do not want guests attending a fundraising

event thinking it is just a cultivation event. Giving them the knowledge in advance of the activities will enable them to feel more at ease and open to the proceedings.

The three main types of event are:

Type	Purpose	Description	Cost	Time	Outcome
Cultivation	To introduce individuals to a cause	Typically small intimate gatherings over breakfast, lunch, or dinner	Low	Low	Engaged prospect pool One on one follow up with attendees to ask for support
		An opportunity to share the vision and aims of a cause A chance for guests to ask questions and become engaged with the cause		Medium	
Fundraising	Events where the sole purpose is to raise funding	Can be either small intimate gatherings or large gala events	Dependent on size – Low	Dependent on size – Medium	Funding One on one follow up with key attendees to ensure longevity of relationship
		There are various innovative ways to raise capital, the most common are auctions or pledge moments An opportunity to reach a large group of individuals in a short space of time	Medium	High	
Stewardship	Events without an ask that seek solely to further engage existing supporters	Typically intimate gatherings but can be larger depending on format and resource	Dependent on size – Low	Dependent on size – Medium	Retained funders
		A chance to be creative and really demonstrate the impact of their donation To thank your funders and position them for the next ask	Medium	High	

Once you know what the objective of the event is, you can plan your invitation list. Will it be a large gala or an intimate dinner? Tailor your guest list accordingly and consider what would be most appropriate from a cultural or social viewpoint.

It may also be worth considering securing a co-host, either an expert in the area your fundraising is focused on, a peer who will be able to widen the invitation pool or a well-known public figure such as a celebrity who can garner publicity.

All elements of the event will then need to be orchestrated to help facilitate the desired outcome. You need to be led by the end result and not by opportunities that present themselves

along the way. For example, if it is a fundraising event, having a panel discussion around the topic in question could lead away from generating the desired emotional response. If it is a cultivation or stewardship event and more focus is given to the entertainment than the subject matter, guests may feel that funds are being misspent.

One of the most important parts of an event is the follow up. Be it securing one on one meetings to personally ask for support, sending thank you letters or conducting thank you phone calls with those who gave at the event, updating those who couldn't attend on the event's success. Whatever the follow up, it needs to be immediate and it needs to be bespoke.

3.3.3 Alternative funding mechanisms

The non-profit and philanthropic landscape today is very different from what it was at the turn of the century and this development has driven innovation in fundraising where various beliefs, approaches, methods, and systems have been adopted and adapted from other sectors.

Today this makes for an interesting space to fundraise in and there are various models available which can be used to generate interest and excite potential donors.

The below are just some of these:

Type	Description	How to put this into practice
Social Impact Bond (SIB) or Development Impact Bond (DIB)	<p>SIB or DIB are essentially a payment by results system where a “commissioner”, typically a local or central government or a private foundation, offers to pay for a better social outcome.</p> <p>An organization delivering programs to improve those social outcomes will secure support from private funders who on success of the program have their initial donation refunded, including, on occasion, a percentage of profit.</p> <p>As a basic example, X Ministry offers \$10 per ex-offender not re-offending 1 year after release. Non-profit Y runs programs costing \$8 per person and secures this funding from philanthropist Z. On evidencing that non-profit Y has reduced recidivism rates, X Ministry pays the promised \$10 covering the donors \$8 donation with a \$2 profit.</p>	<p>SIBs are still relatively new and many philanthropists are unaware that there are such models available where a financial return is possible.</p> <p>This may be an innovative way to excite new funders and unlock funding from the public sector, but can also be time intensive.</p> <p>UBS Optimus Foundation in partnership with the Children’s Investment Fund Foundation and Educate Girls launched the world’s first DIB aimed at retaining girls in education in India.</p>
Crowdfunding	<p>Although the first recorded use of the word “Crowdfunding” was in 2006 in relation to an internet site which enabled groups of individuals to co-donate in the creation of a new product, the concept has arguably been around a long time.</p> <p>In the philanthropic sense, crowdfunding can either take place in the physical world or online.</p> <p>In the physical sense, it can take the form of a giving circle, with membership “fees” whose combined pot is directed towards a common aim.</p> <p>In the online space, it is typically about a much larger viral campaign where masses of individuals all join together for a united outcome.</p>	<p>Create a giving circle that incorporates a funding element (e.g. membership fee)</p> <p>Work with an established organization to run a viral crowd funding campaign, linking in a matched giving element.</p>
Matched giving	<p>Matched giving is a significantly enticing prospect for potential funders as it offers them the chance to have their donation multiplied, maximizing their initial donation and ultimately their impact.</p> <p>There are many examples of this from companies matching employee donations to philanthropists offering to match other philanthropists donations. The UK Department for International Development (DFID) for example has in recent years started to make pots of funding available to partner organizations for specific causes which can be accessed on a one to one ratio (i.e. a non-profit raises \$1 from a donor, DFID gives a further \$1)</p>	<p>There are various ways that this could work in your fundraising:</p> <p>Offering to match all donations you get from your fundraising.</p> <p>Partnering with a ministry, department, company, philanthropist, non-profit where gifts are matched \$1 to \$1.</p> <p>With a fundraising event, offering a matching system can be a powerful elicitor of funding.</p>

Practical considerations

✓ **Remember events take strategic planning**
As mentioned previously, events take strategic planning, with every activity geared towards the desired outcome. Nothing can be left to chance. Done properly, such events cannot be confused with personal events and it would be worthwhile seeking advice from others and attending other such events to see what does and what doesn't work.

✓ **Think of who you can partner with**
If seeking to use an alternative funding mechanism or wanting to organize a large event, it might be worth partnering with others with greater resources, other networks, and specialist knowledge.

From an event perspective, it is worth thinking about the appropriateness for the event to be sponsored. This can be in the form of headline branding for a large gala or as subtle as a thank you in a speech at a smaller gathering. Also seeking to secure the venue, catering, drinks, etc. as gift in kind will help ensure maximum funding goes to the cause.

✓ **Consider the cultural context**
This fundraising guide is written within a western concept of philanthropy and although much is relevant across cultures, one needs to think about socially relevant principals when translating this guide into practice in a non-western context. Publicity and forms of recognition for donors is a key area that will be very different culture to culture. For example, a fundraising event in the USA or UK would be more overt in making the ask and in recognizing donors than in parts of Asia or the Middle East.

✓ **Think about the timing**
Following on from the above, something that should also be taken into account that will aid your fundraising is understanding the times of giving in different cultures and religions, as this will impact when and how they donate.

Although challenging, if not impossible to predict, the timing of global current events will also impact your fundraising, either positively or negatively. A natural disaster will inevitably draw people's philanthropic attention in its direction or extensive media coverage related to the area of your chosen cause might support or weaken your fundraising ask.

4. Evaluate

4.1 Measuring the impact of your fundraising activity

You should now try to evaluate how successful those decisions were in achieving your ultimate goal and the milestones that you originally defined.

The clearer you articulate at the outset where you want to go, the easier it will be for you to assess the success of your activity at the end.

Start your evaluation by developing the overall criteria you will use.

Some things to think about are:	When to evaluate
<p>What fundraising techniques used were most effective</p> <p>What was the amount spent</p> <p>What was the amount raised</p> <p>Numbers of supporters engaged</p> <p>The different donor types</p> <p>The number of new vs. existing supporters</p> <p>What was successful and what wasn't</p>	<p>There is no hard and fast rule on when and how often you should evaluate your fundraising activity.</p> <p>However, a good practice to have is to ensure that evaluation is a live process, ongoing throughout your fundraising activities, with more robust assessments carried out post key milestones such as a fundraising event.</p> <p>If your fundraising activity is an ongoing process and not a one off drive, you need to take into account that some gifts may take longer to realize.</p>

No matter what criteria you choose and how detailed your evaluation is, you should end with insights into the following:

- What accounted for the biggest successes?
- What were the biggest challenges?
- What should you change, avoid, or add?
- How much on average did it cost to bring on each donor and how can you bring that down?

4.2 Measuring the impact of your project or initiative

This document will not go into too much detail on monitoring your project or initiative as this is covered in greater detail in the UBS Philanthropy Compass which is available at no cost in seven languages on the UBS website (by following the link in the box shown in the next section).

However, it is worth mentioning that key to retaining donors for future fundraising activities is the measurement of the impact that their funding has had. Whatever the project or initiative that has instigated your fundraising drive, ensure that a robust monitoring and evaluation process is in place which feeds into a sound reporting mechanism for your donors.

5. Closing

Over and above the sense of achievement of bringing additional resources to a cause you care passionately about, fundraising can be an exceptionally rewarding activity for many reasons.

It can however also be a frustrating, time consuming and costly undertaking if not planned and executed in the right way, at the right time. Therefore, before starting be clear in your own mind as to why you would like to fundraise, what you would like to access or acquire (e.g. funding, networks, products, logistical support), and crucially, why someone would support you.

This document is a resource to help you on your journey, but it is not conclusive, so do speak to others to learn as much as you can before commencing. Your peers will be a good sounding board for initial ideas and thoughts around what might work. Those who have fundraised in the past can provide a valuable insight into lessons learnt and best practice and organizations with whom you are or may be considering partnering with could help you to better understand the need and what they have done previously. Or reach out to a philanthropy advisor to provide support tailored to your needs.

UBS Philanthropy Advisory

UBS has been widely recognized for its thought leadership on the topic of philanthropy and is now the premier reference point for UHNW individuals and families on philanthropy and socially responsible investments globally.

Our global philanthropy experts come from leading institutions across the non-profit and philanthropic sector, who work to help philanthropists achieve their philanthropic aspirations. For more information about UBS Philanthropy Advisory please visit: www.ubs.com/philanthropy

Further Reading

There are numerous resources out there for professional fundraisers. The below are just a select few books and websites that might provide additional support.

Title	Insight on
UBS Philanthropy Compass <i>by UBS Philanthropy Advisory</i>	A step by step guide to accompany you on your philanthropy journey. Available via the UBS Philanthropy webpage
The Generosity Network <i>by Jeff Walker and Jennifer McCre</i>	Written by a fundraiser and a philanthropist, this book looks at how to activate resources
Relationship Fundraising <i>by Ken Burnett</i>	The techniques of effective communication with donors in the twenty-first century
Giving is Good for You <i>by John Nickson</i>	A book about philanthropic motivations, looking at experiences of key philanthropists
Fundraising for social change <i>by Kim Klein</i>	Hands-on, specific, and accessible fundraising techniques for non-profits
The Complete Guide to Fundraising Management <i>by Stanley Weinstein</i>	A step-by-step guidance on planning cost effective fundraising strategies for non-profits
The Institute of Fundraising http://www.institute-of-fundraising.org.uk	The professional membership body for UK fundraising – with guides and resources
Alliance Magazine http://www.alliancemagazine.org	A print and online resource providing news and analysis of what's happening in the philanthropy and social investment sectors
The Chronicle of Philanthropy https://philanthropy.com	An online resource providing news, advice and tools on philanthropy and fundraising
The Resource Alliance http://www.resource-alliance.org	Information on resource mobilization fundraising and philanthropy

Appendix

Publisher	UBS Philanthropy Advisory
Authors	Christoph Courth Grégoire Muhr Silvia Bastante de Unverhau
Contacts	UBS Switzerland AG Philanthropy Advisory P.O. Box 8098 Zürich Switzerland email: sh-philanthropy-advisory@ubs.com www.ubs.com/philanthropy
Design	BLYSS, Zürich
Printer	Neidhart + Schön AG, Zürich

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UBS Switzerland AG
Philanthropy Advisory
Paradeplatz 6
8098 Zurich
Switzerland
Tel. +41-44-234 83 30

www.ubs.com/philanthropy

