

**WHAT KIND OF SOCIETY DO WE
WANT TO BUILD? WHAT IF...**

**THIS ISSUE: NEW LOCALISM, A FOCUS
ON COMMUNITY**

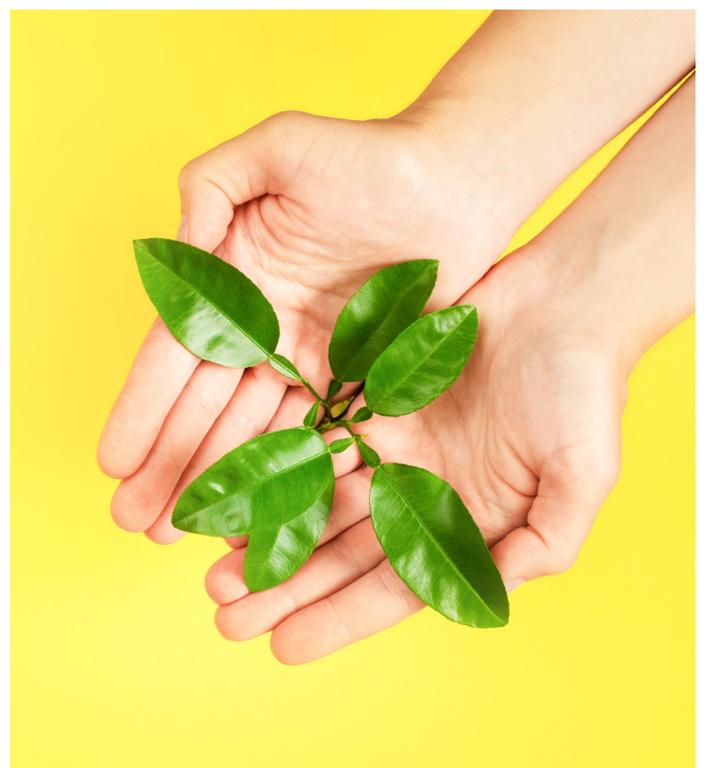
PART THREE OF A FOUR-PART SERIES



HOW LOCAL PHILANTHROPY CAN HELP BUILD A COMMUNITY-DRIVEN SOCIETY



**TRUSTEES AND FAMILY OFFICES AND THE "NEW
NORMAL": WHAT DOES GOOD LOOK LIKE?**



**WILL THE TREND OF GIVING TO LOCAL, GRASSROOTS
CHARITIES CONTINUE FOR HIGH NET WORTH INDIVIDUALS?**

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Vision: A world where individuals and families engage in philanthropy and social impact investment, supported by professional advisors.

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The purpose of the magazine is to share information about philanthropy and social impact investment in a domestic and international context. We welcome articles, letters and other forms of contribution to philanthropy in Philanthropy Impact Magazine, and we reserve the right to amend them.

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EDITORIAL

LOCALISM – A FOCUS ON COMMUNITY

RUSSELL PRIOR - WWW.LONDONCF.ORG.UK

The first wave of COVID-19 saw a rapid change in both practices and approaches to philanthropy to focus on the massive level of need at a local and community level.

Yet as lockdown started to ease, we could already see a reversion to previous ways of working. As we look to the future, we have to find ways of embedding the benefits of the incredible steps forward, and not fall back on old ways.

When COVID struck the UK in March, grassroots charities mobilised. Their agility and size meant they could quickly channel resources to reach the most vulnerable people in their local communities. Their intimate local knowledge and trust became the vehicles for COVID response.

The role of community-level philanthropic bodies in connecting donors with under-the-radar community action became more visible and more essential. And funds followed — from individual philanthropists, companies, housing associations, local and central government. Why? The ability to quickly reach projects, community groups and small charities, who in turn can reach the people most in need.

So what were and are the critical elements that will enable this powerful shift to become not just the vision for the future, but the reality?

Amplifying the voice of the frontline. A louder and more powerful voice for the frontline challenges donors, rebalances power and influences the direction of funding. For example, at London Community Foundation (LCF) the needs of London's communities were built into the approach for our COVID funding — over 50 per cent of funds have supported BAME communities, more specifically investing in BAME-led organisations; almost 20 per cent has been directed towards domestic abuse services; and the 10 London boroughs with the highest child poverty rates have received 48 per cent of COVID funds.

Collaboration. Working together and challenging each other builds trust, proportionality and flexibility. The London COVID response saw a collective of over 60 funders come together to share insights and resources to design COVID grant programmes and deploy funds through one central portal for charities and community groups. Quicker and stronger together.

Recognition of the infrastructure. With so many small charities hit hard by the lack of fundraising events, it is a harsh reality that many, even the most impactful, may not be here in six months. We have to recognise the incredible role played by grassroots organisations.

The outcome? A new partnership. Charitable organisations bringing profound trust, reach and insight; donors and funders guiding and developing impact ambitions alongside people with life experiences to help shape and inform their work.

Localism and a focus on community, where it is accountable, impactful, and resolute, will connect constituents to not only help drive social change but also bring more equality to our communities.



RUSSELL PRIOR

RUSSELL PRIOR – CHAIR, THE LONDON COMMUNITY FOUNDATION

As well as being Chair of The London Community Foundation, Russell is also Chair of the The Bell Foundation and Head of Philanthropy, Family Governance and Family Enterprise Succession at HSBC Private Banking, EMEA.



HOW LOCAL PHILANTHROPY CAN HELP BUILD A **COMMUNITY-DRIVEN SOCIETY**

ROSEMARY MACDONALD - WWW.UKCOMMUNITYFOUNDATIONS.ORG

We need to unlock the power within our communities to enable charities, businesses and public services to collaboratively work together in a combined effort to improve the lives of vulnerable people

When we think of charity, most of us think of bucket-shaking at Christmas or Direct Debits to a favoured cause.

But the truth is that wider-scale philanthropy has always played an integral role in the charity sector's successes. As a consequence, it is responsible for catalysing some of the major social changes throughout history. Philanthropy has been around for centuries. Henry VIII established Christ Church College in Oxford in 1546, and campaigners like John Howard and Elizabeth Fry and the Quaker movement were responsible for prison reform in the 18th century.

Now, philanthropy, both personal and corporate, is needed more than ever as charities reliant on public-purse fundraising struggle to keep up with demand for services.

Recently, Danny Kruger MP released a report entitled Levelling Up Our Communities, which set out a vision for a more local, more human and less bureaucratic, centralised society in which people are supported and empowered to play an active role in their neighbourhoods.

THE VOLUNTEERING MENTALITY

The report was commissioned to ensure that the "community spirit" shown at the peak of the first wave was captured and supported. Whilst local

people volunteering to support their communities in difficult times is nothing new, the sheer number of people volunteering with local grassroots organisations to provide aid was unlike anything we've seen.

Certainly, the volunteering mentality born from COVID-19 is one that we should look to replicate as we look to the future. The uptake in people offering to lend their time and support was extraordinary, and it's this level of energy that is needed to build a reliable and passionate network of volunteers – attributes which are crucial to futureproof against shortfalls.

Together, community organisations, volunteers and statutory services – including schools, local authorities and social services – can work to find more local solutions, with pandemic-built community hubs replicated. Although typically location-based, learnings from the pandemic suggest that theme-focused hubs, such as family hubs, could provide a solution to the increasing demand on social support.

UNLOCKING COMMUNITY POWER

To make this a reality, we need to unlock the power within our communities to enable charities, businesses and public services to collaboratively work together in a combined effort to improve the lives of vulnerable people.



ROSEMARY MACDONALD



Philanthropists are key to such social transformation, enabling people in the community to unify and be heard. However, with society suffering from a lack of organisation and cohesion between the efforts of individuals and organisations, it is crucial that resources are put towards funding more community organisers at a local level.

Community organisers have the power to work with grassroots groups lacking capacity and bring them together to combine their efforts and ensure needs are met. Asset-based community development (ABCD) is an effective way of strengthening communities through connecting people that might otherwise be isolated, and recognising, identifying and harnessing their skills, knowledge and resources to quickly build trust and flourishing partnerships.

KEEPING IT LOCAL

To ensure communities are heard and aren't subject to geographical bias, it's crucial that this authority and impetus remains local and independent to the government. Community foundations can have a hand in this by becoming a local convener for grassroots charities, helping them to solve social issues in an independent and strategic way by connecting them with likeminded businesses and individuals to combine resource and knowledge.

The effectiveness of such local decision-making has already been proved during the pandemic. Independent coronavirus appeals galvanised communities to raise

thousands of pounds for those in need – which is why it's essential that we carry it into the future to build more empowered, resilient communities.

A shortfall in conveners isn't the only challenge to be addressed, though. To build a community-driven society, it's important to recognise and actively work to limit the long-term social and economic effects inflicted by COVID-19 on people across the country.

A recent [article](#) in *The Times*, about Amazon CEO, Jeff Bezos' (worth £160 billion) lack of philanthropy, shone a light on the personal responsibility that high-earners bear. When an individual's personal wealth is higher than the GDP of certain countries, it begs the question as to whether they have the responsibility to do more. After all, you can only wear one pair of shoes at a time.

COMBINING RESOURCES

By thinking creatively about their giving – and considering local organisations as well as their own interests – philanthropists can help communities at grassroots level. Although typically an individual act, by taking a brave step and collaborating with other likeminded donors to combine resources and money, philanthropists could end up increasing their impact on society beyond what they could achieve alone.

Working with community foundations to establish a matched funding programme is a good place to start, as community foundations' strong local knowledge –

“COMMUNITY ORGANISERS HAVE THE POWER TO WORK WITH GRASSROOTS GROUPS LACKING CAPACITY AND BRING THEM TOGETHER TO COMBINE THEIR EFFORTS AND ENSURE NEEDS ARE MET.”



which has been built up through years of needs analysis, local grant-making and convening key partners – enables them to distribute funds in a way that will ensure the greatest local impact. [The National Emergencies Trust Coronavirus Appeal](#) is a prime example of this. Community foundations have distributed £55 million in emergency funding leveraged from a range of supporters and this has had a massive impact in communities.

ARTS AND CULTURAL HERITAGE

The UK's culture and community assets should be another focus. The arts and cultural heritage sector has been badly affected by the pandemic, and the recession means this is likely to continue.

Philanthropy focused on supporting local grassroots charities that keep museums, galleries and music venues running are equally important – after all, without charities like the [Music Venue Trust](#), the likes of Adele, Amy Winehouse and Ed Sheeran might not have had the success they are recognised for today.

Certainly, the coronavirus has acted as a catalyst for reflecting on the kind of society we want to build and how we can best support the transformative changes that the country is facing.

To find our footing in this new normal, it's essential that philanthropists consider the positive impact their time and money can have on local organisations, helping them to protect the most vulnerable in their community.

Ultimately, the focus shouldn't be on how society is to return to normal, but rather, how we must strive for a society that empowers local people to act and change their community for the better. This is the kind of society we are looking for.

"CERTAINLY, THE CORONAVIRUS HAS ACTED AS A CATALYST FOR REFLECTING ON THE KIND OF SOCIETY WE WANT TO BUILD AND HOW WE CAN BEST SUPPORT THE TRANSFORMATIVE CHANGES THAT THE COUNTRY IS FACING."

ROSEMARY MACDONALD – CEO, UK COMMUNITY FOUNDATIONS

Rosemary Macdonald is a leading third-sector expert in transparency and accountability, governance, and best practice, and has been a part of the Community Foundation network for twelve years.

With a master's degree in Charity Finance and Accounting and a diploma in Charity Management, Chartered Secretaries and Administrators, Rosemary drives the growth and strategic direction at UK Community Foundations – a national network which connects people and organisations that want to improve their communities.

Committed to promoting the work of community foundations, Rosemary is focused also on taking the charity sector forward, building strategic partnerships at local, regional, and national government level and with the business and public sectors.

Prior to becoming CEO, Rosemary served six years on the Board for UK Community Foundations, and during that period was Vice Chair for three years and Chair of the Membership Committee for three years, respectively. Rosemary has served as CEO at Wiltshire Community Foundation for twelve years.

UK Community Foundations is a national network of 46 accredited community foundations across the UK. Our members bring communities together, fund great ideas and inspire local philanthropy. We support community foundations by providing advice, learning and resources, by championing philanthropy at a national level and by developing national programmes that invest in local communities.

Our network collectively gives out around £100 million every year in grants to charities, community groups and individuals.

TRUSTEES AND FAMILY OFFICES AND THE “NEW NORMAL”: WHAT DOES GOOD LOOK LIKE?

LYDIA ESSA - WWW.TRUSTCORPCI.COM

A good trustee or family office team is in a unique and privileged position, perfectly placed to galvanize families on philanthropic strategic direction and responsible/ESG investment. And they should be encouraged and educated in how to play this fundamental role now

This year has seen a simultaneous health and financial crisis on a global scale. The pandemic has arguably served as the most powerful social leveller ever seen — very few have not felt its impact in some way and there is a sense of inevitability that the worst is yet to come.

The value and fundamental importance of healthcare, social funding and education has been reinforced, and the imperative for timely philanthropic activity as part of a global response is becoming clear. In parallel, conversations on social enterprise and impact investing have moved up the agenda quickly.

Exceptional circumstances demand exceptional responses, and high net worth individuals, and families with philanthropic ambitions and a loud social conscience, must react, respond and mobilise at the earliest opportunity, as the world feels its way through (and shapes) the ‘new normal’. But how can a family trustee or family office contribute to this process?

It is generally regarded as the responsibility of private wealth advisors to start the conversation with families they advise on the nature and extent of their philanthropic aspirations and also, increasingly, the options available to them for ESG investing (i.e. an investment approach that takes account of environmental, social and governance issues). The pivotal role that a family trustee or family office can (and arguably should) play in expediting a family’s thought processes and planning on these issues, however, can be understated or overlooked altogether. This is a missed opportunity and the lens through which trustee duties are framed and judged may need a change of focus.

FIRST PRINCIPLES

Going back to first principles, trustees of family asset-holding structures generally operate within a strict legal framework that imposes upon them core fiduciary duties to act reasonably and prudently, with care, skill and, importantly, at all times to act in the best interests and for the benefit of their beneficiaries. They have to give very careful consideration to how trust monies are applied and cannot ever be influenced by their own moral considerations when deciding if, when and how to apply or invest any part of a trust fund.

That said, they can (and probably always should) consider moral wellbeing or a wider moral or social obligation when deciding whether it is beneficial to make a distribution from a trust to, for example, a charitable organisation on behalf of a beneficiary, or directly to a beneficiary, for the purposes of establishing and/or funding a philanthropic vehicle. But this can only ever be one of a host of factors that will need to be considered.

Likewise, in an investment context, trustees are generally duty bound to consider investment performance and not just moral and social factors. However, this can be a complex area for them. The definitions of ‘best interests’ and ‘benefit’ in a trusts context usually need to be demonstrated by reference to financial measures. But do we need some further means of measuring the “value” of ESG investment and philanthropy to assist trustees in their decision-making?

In Guernsey, a fundamental feature underpinning its trust law is the duty of a trustee to act as “bon père de famille” (or “as a good father”). Again, query whether the existence of a duty of this kind (which is replicated in a similar form in a number of jurisdictions with reputable trust law regimes)



LYDIA ESSA

“THE DEBATE UNDOUBTEDLY CONTINUES IN 2020, BUT TRADITIONAL ARGUMENTS ON THE (INFERIOR) LEVEL OF RETURNS FROM ESG INVESTING ARE BEING CHALLENGED.”



actually imposes a positive duty on fiduciaries to take an active, rather than passive, role in the philanthropic process and the consideration of wider ESG issues and, importantly, take a longer-term view as part of their overall stewardship of the trust assets?

FIDUCIARY DUTIES

The clear mission underpinning the UN Global Compact’s 2016 report, *Fiduciary Duty in the 21st Century*, was to end the debate about whether fiduciary duty is a legitimate barrier to investors integrating ESG issues into their investment processes and to encourage a shift in society’s expectations of modern-day fiduciaries and the duties imposed on them. The debate undoubtedly continues in 2020, but traditional arguments on the (inferior) level of returns from ESG investing are being challenged — a BlackRock report ([Sustainable investing: resilience amid uncertainty, 2020](#)) from earlier this year noted that 88 per cent of the sustainable indices it analysed outperformed their non-sustainable counterparts across the first four months of 2020, when the world was in the grip of the pandemic. There is a demand for a wider acceptance that ESG issues are financially material.

Putting aside the intellectual debate for now, it must be acknowledged that a good trustee or family office team is simply in a unique and privileged position as the ‘reservoir’ of all knowledge on a family and its affairs. They are perfectly placed to galvanize families on philanthropic strategic direction and responsible/ ESG investment, and they should be encouraged and educated to exploit this position now — can it ever be justifiable to cut this corner?

Engaging with families across the generations can be a fundamental part of this journey — it is rarely good trusteeship (and usually short-sighted) to

limit the extent of the relationship to one between trustee and settlor/patriarch alone. The ‘next generation’ often present fertile ground for early commitment to philanthropy and responsible investing, even if they do not know when and where to start. The trustee/family office can guide the whole family (whose views may not be aligned on philanthropic and investment strategy) on that potentially complex yet rewarding journey.

A BOLD RESPONSE

It is worth emphasising that the aforementioned features (and outcomes) of sound trusteeship and effective family office arrangements, and their potential influence on a family’s overall contribution to a better society, are not unique to the COVID-19 response. The crisis does, however, focus minds on the truly unique position of trustees and family offices and how these relationships can be leveraged to ensure maximum impact at this time of maximum need. Society is demanding a bold response from them.

In practical terms, this means being proactive and investigating levels of available capital, associated costs, appetite for risk, ongoing involvement and control etc. in a philanthropy context. They should introduce families to specialist advisors, provide insight into non-profit sectors and regions, research innovative ways of giving and investing, investigate tax efficient solutions with families and their advisers, and generally act as ‘connector’s between families and experts who can collaborate and assist them in fulfilling collective aspirations for a better society. They can also work with families to futureproof new trusts at the point of establishment by hardwiring into trust instruments duties and responsibilities more compatible with the current and future needs of families and wider society.

LYDIA ESSA – DIRECTOR, TRUST CORPORATION INTERNATIONAL

Lydia has a diverse client base and works with a wide range of international High Net Worth Individuals and family offices. She specialises in complex trust matters (complex in both a structural sense and in the context of family dynamics).

After completing a law degree at Cambridge University, Lydia completed her training contract at the magic circle firm, Allen & Overy LLP. She then spent ten years practising as a private client lawyer, first at Allen & Overy LLP and then at private wealth boutique firm, Maurice Turnor Gardner LLP. Lydia has extensive experience working on complex asset holding structures, and is closely involved in the design, establishment and ongoing administration of these structures.

While in private practice, Lydia was twice named one of Private Client Practitioner’s “Top 35 under 35” and features in the Citywealth IFC Powerwomen Top 200 list.

In short, at a time when everybody is being tested in some way, with priorities shifting and the true impact of the crisis beginning to materialise, the family trustee and the family office (or both working collaboratively – a potentially formidable combination!) can and, wherever possible should, play a fundamental role in identifying, enlightening, reinforcing and, ultimately, executing the visions of those within the family committed to giving and investing widely and responsibly for the greater good.

“AS ONE OF THE GRANT-MAKERS IN KENT, SUPPORTING LOCAL, GRASSROOTS CHARITIES, KENT COMMUNITY FOUNDATION HAS SEEN FIRST-HAND HOW THE RECENT, UNPRECEDENTED CHALLENGES HAVE FOCUSED PEOPLE’S MINDS ON THE NEEDS OF THOSE CLOSEST TO THEM.”



WILL THE TREND OF GIVING TO LOCAL, GRASSROOTS CHARITIES CONTINUE FOR HIGH NET WORTH INDIVIDUALS?

JOSEPHINE MCCARTNEY - WWW.KENTCF.ORG.UK

HNW donors say that seeing first-hand the incredible work of local charities is making them feel more connected and re-think their future charitable giving choices. How can this grassroots giving be supported and encouraged?

According to a recent YouGov survey, willingness to help in the community has increased since March 2020. As the coronavirus pandemic hit, more people than ever found themselves considering what they could do to help those in their local community. Small charitable groups saw offers to volunteer swell, and the number of donated goods rise exponentially, begging the question — has the power of local community groups and grassroots charities now been unveiled?

While there is a certain degree of comfort in supporting an established national charity with a high profile, philanthropists are now looking to more local organisations who provide vital front-line services that address issues in their very own communities. This has been evidenced by the number of private family trusts that have donated to the [National Emergencies Trust](#) (22 per cent of total donations has come from foundations) in the knowledge that the majority of their donations would be distributed to small, grassroots organisations. This behaviour has also been replicated across the [UK Community Foundations network](#) where philanthropists are redirecting their charitable giving from national and international charities to local causes.

As one of the grant-makers in Kent, supporting local, grassroots charities, Kent Community Foundation has seen first-hand how the recent, unprecedented challenges have focused people’s minds on the needs of those closest to them. In more ‘usual’ times, the Foundation awards around £2.5m in grants annually to around 600 organisations and individuals, but since March 2020, the Foundation has awarded more than £2m in emergency and resilience funding alone, and this is in part thanks to a change in attitude towards the effectiveness of small, local organisations.

With most people in lockdown and travel restricted for the best part of five months now, people have been spending more time in their local communities and feeling a desire to do something meaningful to help their neighbours. According to our own HNW donors, they feel more connected to their local communities than ever, as they have seen first-hand the incredible work of local charities, making them re-think their future charitable giving choices.



JOSEPHINE MCCARTNEY

WHAT MAKES THESE SMALLER, LOCAL CHARITIES SO EFFECTIVE?

Put simply, it is a knowledge and understanding of the needs of local people. Decisions are being made by people who are close to beneficiaries. Grassroots charities are led by those who truly see, and in most cases, have experienced the challenges of those in need and understand what changes will bring about a positive difference to everyday lives. This is highlighted in the information provided in the application forms we assess every year (more than 1,000) and the relationships we have with the founders of these charities and local organisations.

Giving locally can provide a donor with the reassurance they often seek as they are able to see first-hand exactly where their money has gone. This can also provide more opportunities to engage with the charity. Through regular dialogue and feedback from our own private family donors, we know that there is a desire to engage more, and this has been emerging for some time now. One example of this is a retired ultra-high-net-worth (UHNW) accountant who gives their money and expertise to

small, local charities to help them with their financial planning and to put in place more sustainable service delivery models. This type of pro bono work for a small charity is invaluable.

For most of our HNW donors, being able to see the organisations they support in action first-hand helps to overcome any preconceived ideas about how small, local charities operate. They are able to speak to the Chief Executive, the front-line staff and the beneficiaries face to face about the work they do and how this changes lives. This engagement often evolves into long-term relationships between the donor and the local charity because they can see for themselves how the charity is using their donation.

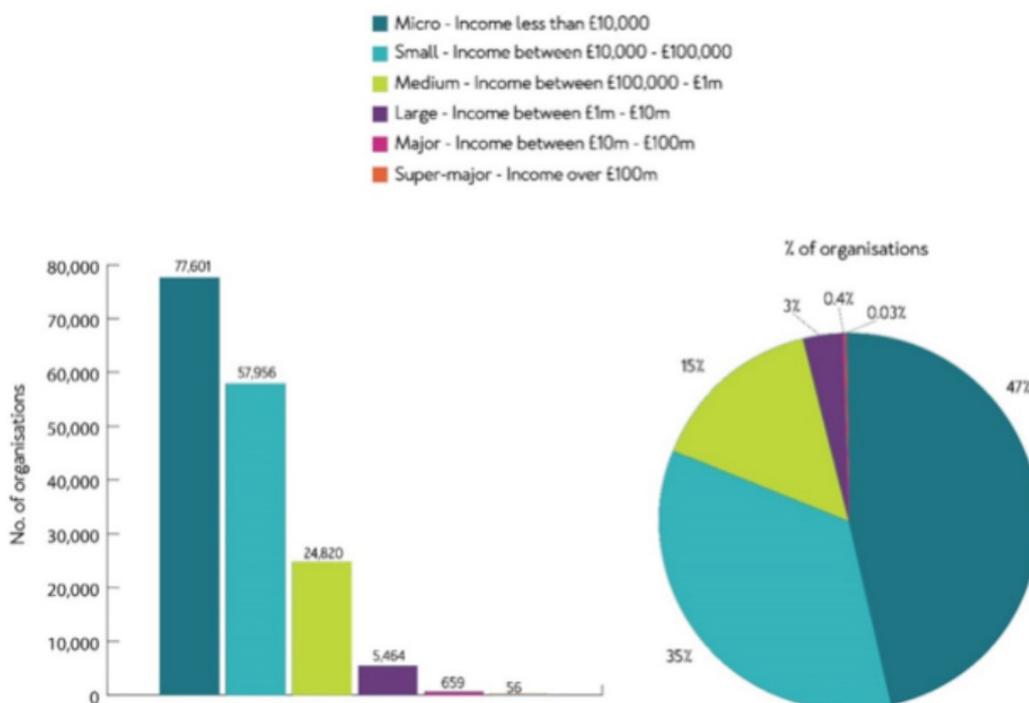
The UK Civil Society Almanac report for 2020 states that there are 166,592 registered charities in the UK (see chart below). 81 per cent are made up of micro and small organisations with an annual income of less than £100,000, yet they receive less than 18 per cent of total donations. Philanthropists can help redress the balance by starting to think more locally and redirecting some of their national giving to small, local organisations instead, as we witnessed throughout the early stages of the pandemic.



“GIVING LOCALLY CAN PROVIDE A DONOR WITH THE REASSURANCE THEY OFTEN SEEK AS THEY ARE ABLE TO SEE FIRST-HAND EXACTLY WHERE THEIR MONEY HAS GONE.”

Number of voluntary organisations in the UK by income, 2017/18

Source: NCVO/ITRSC, Charity Commission





THE CHALLENGE OF LOCAL GIVING

The main challenge for many who want to give can be the overwhelming choice. It's not just a case of finding the time, which is in short supply for many philanthropists, but the fact that there are scores of small charitable groups to choose from — some of whom aren't easy to find, especially if operating in more rural areas. Added to this, those giving want to be sure of the credence of small groups and their effectiveness.

This is where working with trusted local partners can be invaluable. Community Foundations are one option but there are also independent philanthropy advisors as well as [Charities Aid Foundation](#) who all provide services to help people to make the right choice when it comes to supporting local organisations.

What is heartening to see is that donors are growing in confidence when it comes to giving locally. Perhaps this is borne of necessity and a recognition that in times of crisis one should look more locally if we want to make a real difference in the communities in which we live. This shift from national to local is also seen in the research carried out by CAF Bank — [CAF UK Giving Coronavirus Briefing](#):

how charities and donors are reacting to COVID-19, April 2020 — during the first three months of this financial year, which reported that, when asked, more people said they had given to a local charity recently or were planning on giving locally rather than nationally. This is definitely a step in the right direction.

“WHAT IS HEARTENING TO SEE IS THAT DONORS ARE GROWING IN CONFIDENCE WHEN IT COMES TO GIVING LOCALLY.”

JOSEPHINE MCCARTNEY – CHIEF EXECUTIVE, KENT COMMUNITY FOUNDATION

Josephine lives in Kent and has worked in the charitable sector for more than 18 years. She was previously Director of Fundraising and Communications for Imperial College Healthcare Charity, an independent, grant-making charity raising funds for projects, research, equipment and training at five London hospitals. Before this, Josephine held a variety of strategic positions with the Royal National Institute of Blind People (RNIB). She is a volunteer Enterprise Advisor, for the Enterprise Advisor Network, supporting Careers Advisers in schools across Kent and Medway, and the Co-Chair of the Kent Children & Young People's Steering Group.

SHRINKING WINDOWS OF OPPORTUNITY

KATE HAINSWORTH - WWW.LEEDSCF.ORG.UK

There is no doubt community-led activity has played a crucial role in national wellbeing and resilience during COVID-19. But the infrastructure behind that community support is fragile. We need to invest more, and more consistently, in sustained resourcing of the community sector.

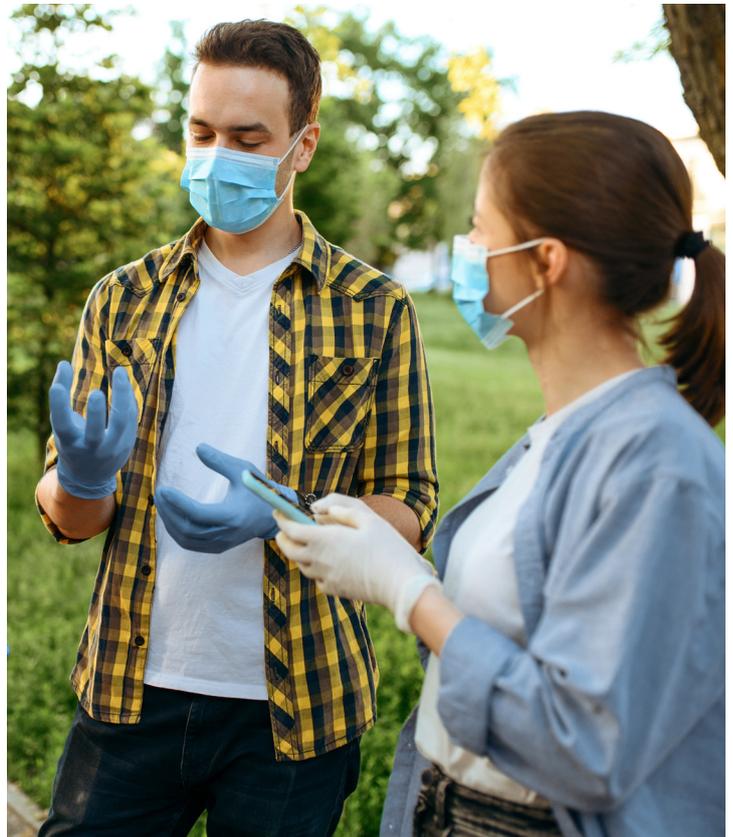
Today I went to work in the office. The fact that offices are opening again is as sure a sign as school uniform sales and autumn leaves that the opportunity window is shrinking rapidly.

Let's grasp that opportunity and climb through the closing window, before our old normal returns, and the chance to think about a 'new normal', and most importantly implement it so that it sticks, is gone for good.

The speed with which we all adapted to home working in the spring — because government said so — perhaps seduced us into thinking that other social 'new normals' could be introduced just as swiftly. As the seasons progress, however, it's a useful reminder of predictability: unavoidable stages need to be completed before achieving lasting change. That's not to say they can't happen quickly, but the need for those stages tends to drag out the process, particularly when we are talking about lasting social change.

In West Yorkshire we have another shrinking window — elections will be held next May (2021) for a new Mayor of West Yorkshire, with devolved powers. I'm a relatively new recruit to the [Leeds City Region Local Enterprise Partnership](#) and the [West Yorkshire Economic Recovery Board](#), convened this summer to address need and resourcing for our city region, so this agenda is becoming more familiar, and with it, the chance to reflect on our regional society's status quo.

My day job as CEO of a community foundation targets my interest fair and square on the very local grass roots community activity that often falls outside the radar of larger trusts and foundations, or below the notice of the city region bodies. This lens can appear parochial in relation to 'society' as a whole. There are certainly some local specifics that don't appear to have much of



a national or regional parallel. However, Leeds City Region is recognised as a microcosm of the national demographic, and our [Leeds Community Foundation](#) and [GiveBradford](#) microscope have provided insights pertinent to our discussions at the city region level. Furthermore, our role as a community foundation requires us to leverage discussions and funds from national private and public sector sources. And, in the recent crisis, we worked as a channel for [national emergency funds](#) — brokering a direct relationship between central government and the very small scale, and very local — facilitating a connection that created beneficial learning opportunities in both directions. Similarly, it is clear that colleagues around the LEP or Economic Recovery Board tables are acutely interested in the community outlook and promoting an agenda that serves communities well.

There's no real doubt that community activity has been recognised as playing a crucial role in national wellbeing and resilience during the COVID-19 pandemic in the UK — closely connected with and complementing our emergency public services. What is less visible, is how fragmented and fragile is the infrastructure behind that community support — and how vulnerable it is to being swamped or swept away by the ongoing crisis.



KATE HAINSWORTH

Others argue for nationalising these community groups and services.

I don't.

There's a unique benefit in community-led activity: that it remains community-led. Those trusted by the community know best what to do to support it. They have lived the community experience and understand how to advise and deliver on plans to provide resource and opportunity to that community. Anything else — usually — becomes 'doing to' rather than 'doing by' and is — usually — set to fail. That isn't to say that community activity can't be facilitated by external agents, but that is best served by agents keen to develop local community leaders who can steward the activity long into the future. Otherwise, well-meaning investments over many years in 'doing to' are limited.

Now, as we have the chance to think about alternatives, my hope is that this vital work carried out by communities is recognised as the fundamental missing 'sector' in our national conversation. The crucial community pillar that provides our social glue, and gives every one of us a meaningful stake in our society. For these community stakes to be meaningful, they need to reflect a grown-up relationship with the other stakeholders — public and private sectors — and that requires resourcing, changing the rules to allow communities to engage properly, and a recognition that such engagement cannot be achieved overnight.

The recent discussion hosted by Philanthropy Impact's 'Walk In My Shoes' series — [What Kind Of Society Do We Want To Build?](#) — opened up a useful discussion around hopes and aspirations to 'build back better', which many of us have been pondering since Lockdown began and the chance for a 'reboot' first seemed possible. Natasha Mueller's hope for putting human capital and the individual into the centre of our thinking is exactly what colleagues and I have been emphasising for our city region — and further, a recognition that our diversity is our strength, as Martin Short's important focus on equity in the same discussion highlighted. Our city region has prioritised 'people' and 'net

zero carbon reduction', as both being fundamental to our human experience. We have all been exploring to a greater or lesser degree the difficult and charged conversations necessary to inspect how equitable our operations are, when put under the spotlight shone by the Black Lives Matter movement. Similarly difficult conversations are needed to recognise that placing people at the heart of our plans involves changes to the way we've always done things: and embracing the consequences of that shift.

Martin articulated a common experience of partners talking of 'collaboration' but really meaning 'doing things my way' without change, compromise or loss. When discussing the focus on people for our economic recovery plan, there were questions regarding measurement and how to know we have made a difference. Fair questions. The [Pro Bono Economics work](#) and others have shown how choice of what is measured skews activity and outcomes — so careful choices are required. This opportune window to think about how to measure and interact with community has been well used by think tank Onward in their [State of our Social Fabric](#) report. In my experience, few community groups that have operated for a period of time have done so without any evaluation of their impact — but if the design of that evaluation is 'done to' rather than 'done with' we end up with groups and individuals struggling to use an inappropriate measure. Too often, community groups depend on grants of insufficient size or duration to justify the distraction of their time away from core delivery — especially in a crisis. This isn't to argue against measurement — but for its proper resourcing.

Which is my main point.

In order to reset the dial and put people at its heart, I suggest we need to change the way community activity is articulated and understood. Furthermore, we need to invest more, and more consistently, in sustained resourcing of the community sector. By doing this we deliver on our belief that people have the capacity to resolve their own challenges — that adult relationships between the community and other sectors require the same kind of equity as in any partnership, to



KATE HAINSWORTH – CHIEF EXECUTIVE, LEEDS COMMUNITY FOUNDATION

Kate Hainsworth is the CEO of Leeds Community Foundation and GiveBradford. Both organisations support thousands of charities and voluntary groups by addressing inequalities and working together to help create opportunities for those that need help the most. We invest in these groups by distributing grants and sharing advice – acting as a catalyst for positive change.

generate humane and diverse solutions to the complex network of challenges that we are going to be facing in the coming years.

This is in no way an original suggestion — I'm delighted to say others have observed and acted upon it already — but where this is beginning to happen, it is piecemeal and disconnected. The NHS has recognised the massive contribution community work has played in prevention and the 'left shift' away from crisis management into health and wellbeing. The police have for years recognised the importance of community for good policing. Where we've been able to piece it together locally or at the city region level, it has been for a particular project or programme, not universally across the board, or for the long term. It is the nature of the community sector to be diverse and that can appear unwieldy and challenging for forging a true long-term partnership — but if ever it could be done, it would be now, before our windows of opportunity close up again at a local, city wide, regional and now national level.

“ONE LEGACY OF THE PANDEMIC AND LOCKDOWN IS THE INCREASED FOCUS ON CONNECTED COMMUNITIES, WITH PHILANTHROPY SUPPORTING LOCAL COMMUNITIES AND COMMUNITIES OF IDENTITY TO MEET THE NEEDS OF THEIR CONSTITUENTS.”



CONNECTED, COORDINATED AND IN CONTROL: THE POTENTIAL FOR COMMUNITIES POST-PANDEMIC

ADRIAN SELL - WWW.OXFORDSHIRE.ORG

With its origins in rebuilding after wartime bombing, the concept of ‘Build Back Better’ must be our mantra now too

The pandemic and lockdown have increased the need for more connected relationships between people and organisations. A stronger society of the future will be able to thrive through challenging economic times, drawing strength from well-organised, empowered communities.

In the face of this pandemic, we have seen many organisations abandon their previous strategies and focus on supporting local communities. In the case of the third sector, many have had to recalibrate their work to meet new needs and to find new ways of meeting existing needs.

Now that we are moving on from the immediate crisis, many of us are asking ourselves if we want to return to the way things were before. There is a parallel with international humanitarian relief and the concept of “Build Back Better”, whose origins are in rebuilding a bombed building to be better than what had gone before. Now it has moved on to include social structures and decision-making; and crucially, recognising crisis as a time of change and renewal that offers opportunity alongside the suffering and trauma of the disaster.

WATERSHED MOMENT

It feels like we are now at a watershed moment, where the familiarity and comfort of the previous status quo risks us slipping back, unthinkingly,

to how things were. Instead we must invest in the energy and urgency to seize the opportunities to build a stronger society.

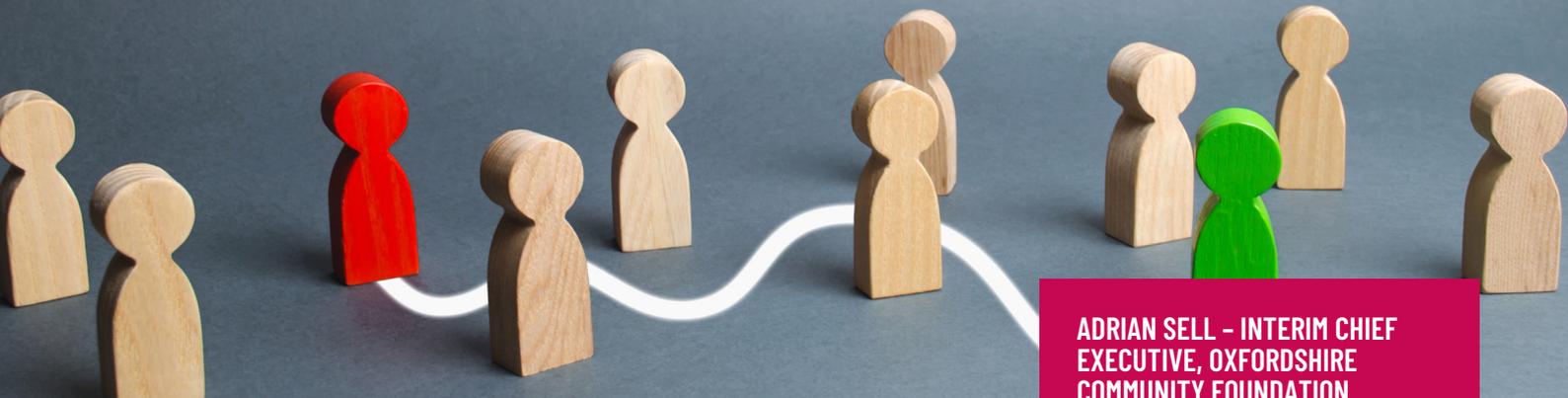
One legacy of the pandemic and lockdown is the increased focus on connected communities, with philanthropy supporting local communities and communities of identity to meet the needs of their constituents. People have been catalysed to take action on long-held intentions to support older or vulnerable people in their neighbourhoods. Homelessness charities in Oxford tell us there has been better collaborative working than they have seen before in order to get rough sleepers inside and provide the wrap-around support needed.

At the heart of this work has been a rebuilding of relationships. The first relationships you have in life (indeed while in the womb) can shape your expectations and life chances, and the number of relationships you have aged 60 is the best predictor of how long and how healthily you are likely to live. This extended network of connections is what gives our lives meaning and connection — it is what sustains us, in extremis, quite literally.

Indeed, what COVID has taught us is that we may all, at some stage, need to call on the kindness of strangers, so we must all invest in those local relationships — out of altruism or the need for connection, or simply the fear that one day we too shall need the support of a more able or healthy



ADRIAN SELL



ADRIAN SELL - INTERIM CHIEF EXECUTIVE, OXFORDSHIRE COMMUNITY FOUNDATION

Adrian Sell is Interim CEO at Oxfordshire Community Foundation (OCF). He has a background in crisis response around the world, and strong connections with the local community and voluntary sector in Oxfordshire. His experience includes working on hurricane response, refugee and post-conflict programmes in Rwanda, Liberia, Kosovo, Dominican Republic and Algeria.

He has worked for Oxfordshire County Council and spent 10 years in the voluntary sector with East Oxford Action, as Director of Services for Age UK Oxfordshire and as Executive Director of OXIIP. More recently he was CEO of international mental health charity BasicNeeds. Taking on the CEO role at OCF in the midst of the first wave of COVID-19, he has led the organisation in driving the community response to the pandemic across Oxfordshire, and aims to support the sector and communities of Oxfordshire to recover stronger from the crisis.

neighbour. Both the offering and receiving of kindness are the very essence of what it is to be human, and the web of relationships within local areas, within identity and interest groups and, crucially, connecting across diverse groups, are the essence of what community is. These relationships and connections have been considerably strengthened through lockdown, and we must build on this legacy in order to preserve the best things about our humanity.

However, there is a significant challenge, and a massive driver of the need to act. There is now less money available and more need, and a likelihood that both problems will worsen as the economic fallout becomes apparent. The pandemic has embedded and enhanced pre-existing problems. Educational inequality – shockingly poor in Oxfordshire – is widening and likely to widen further in the coming months. Unemployment has already risen sharply and is likely to rise much further. Many will face risk of eviction or homelessness, and loneliness has surely been exacerbated by the very idea of ‘social distancing’.

The society that we need to build is, therefore, one that can weather these and other storms: a more inclusive one, where people feel genuinely invested in their local area and communities of interest, regardless of their wealth or background. Where people can convene around a place or interest and see each other as neighbours and allies, not factions separated by class, politics or notions of what is and isn’t acceptable to say. This requires more than optimistic words about connections and potential; it requires those who care and have the means (philanthropists as well as delivery charities – most of us in fact) to bring about a radical shift in

approach that vests power and agency in the hands of the people with the energy, ideas and connections to provide the support that is needed.

We need to arm communities, organisers and champions with evidence and information about what works, and connect them with others so that they can coordinate, convene and act. In part this requires investment of resources, but it also requires a radical rethink of how we all work. If you were to map all the third sector activity and expenditure in a disadvantaged community you would see a mess – of organisations, accountability, bureaucracy and communications. We have to turn the prism around to one where the default is that the resources are genuinely controlled by local communities, not by remote (albeit well-intentioned) organisations.

An example that we are exploring in Oxfordshire is the digital deficit, a problem underlying many of the big issues: if school children have no access to tech, they are at an immediate disadvantage in a home-schooling environment; giving an isolated older person the ability to speak to their family on Zoom could be transformative for their mental health, pandemic or no pandemic. In most communities there is discarded kit on shelves, people who can refurbish old kit, others who can train users, and local ways of getting people the WIFI or data they need. We must empower communities to organise themselves to address this, bringing together equipment, data and skills to support people and underpin long-term change in their lives. This approach will be needed on a range of fronts.

If we hope to be in a stronger position to address the issues that blight our world and enable people to connect

with the humanity of our neighbours, we must build a society where local communities are connected, coordinated and in control of their own destinies. It is only by ensuring that we start with communities that we will be able to build a more resilient society.

This means investment in infrastructure organisations who can share knowledge and expertise, and coordinate complex networks. It means investment in grassroots communities to encourage their own initiatives and ideas to take shape and grow. And it means ensuring that we trust and empower communities rather than putting stumbling blocks in their path. It will require a reorienting of finance, organisations and charities to support the growth of leadership and agency that local communities so badly want, and so badly need, in plague times and beyond.



“PHILANTHROPISTS MUST TRUST PEOPLE WHO ARE EXPERTS THROUGH THEIR OWN HARD-LIVED EXPERIENCE.”

The times we are facing are extraordinary and the risk of decimating civil society is almost unthinkable but quite possible. If the small, local charities close down how will this affect our society? Quite simply, it will decimate the society we have tried to build over the last generation. Imagine the number of people who already live below the bread line, who without the charities and food banks are unable to feed themselves and their families. Imagine if those charities were to close down. Who would help them then?

From what we are hearing, things are going to get a lot worse before the year is out...“Yesterday, I had a harrowing conversation with X from a local children’s charity. X was delivering educational packs to some of the most deprived primary school children in the estate where she was brought up – she thought she knew and understood poverty but was horrified at what she found. She talks of front yards full of fly-infested rubbish, inside children are half-dressed in filthy clothes, looking unwashed and under-nourished. X described one household, filthy inside and out, where the 24-year-old mother was heavily pregnant with her eighth child, the children half-dressed in filthy clothes, mum in an unwashed nightdress, the 8-year-old, for whom the pack was intended, still asleep at 2.30pm. Another, where it took an age for the door to be answered, father did his utmost to prevent X from seeing the child, who eventually appeared looking terrified – X believes she interrupted them mid-abuse and has reported as such to the child’s school. And so it continued, house after house, with other volunteers reporting similar findings in other areas. These parents

are not even trying to help themselves or their children – they seem to have given up trying. The only children who looked well cared for had been taken away from parents and were living with grandparents. The only positive from her experience was seeing the children’s faces light up when presented with the educational packs.’

What X describes is Dickensian. These children are living in abject poverty.

And it is not only food poverty. The rise in domestic abuse cases increased preventable deaths at a rate of almost 2,700 people in the UK every week – because of the effects of the lockdown and significant emerging needs re: personal hardship and mental health deterioration. “There is very limited capacity in the system at the moment for specialist debt advice as it has been reduced significantly, with some providers ceasing this service.” (Anonymous)

Philanthropists in the past would expect their money be used for a specific project, but increasingly donors we work with are trusting groups to use their funds in the ways that groups see fit. This works well when groups have funder capital, when they are known to philanthropists or funders, but once again if we are not careful we risk missing out on supporting groups and communities without that funder capital and once again perpetuating the inherent unfairness in much of philanthropy and funding.

Philanthropists must trust people who are experts through their own hard-lived experience. Their local, trusted relationships mean donated funds will be wisely invested. Forget about the past

**ISABELLE CLOUGH –
PHILANTHROPY ASSOCIATE, TWO
RIDINGS COMMUNITY FOUNDATION**

Isabelle works with a range of donors and philanthropists, including individuals, families and corporations, providing advice on effective philanthropy in North and East Yorkshire. Two Ridings focuses on small, grass roots charities, and Isabelle is responsible for not only donor relations but also for encouraging Professional Advisors to understand the needs and impact of philanthropy in the region, so that they can impart this knowledge to their clients. Prior to this, Isabelle worked in London in Corporate Finance and Private Client Banking, and graduated from Durham University with a Bachelor of Science.

constraints, don’t expect reports, and if you want to understand how the money has been spent go and see the charity and meet the people. This extraordinary world needs philanthropists and funders to lead the way and show others how and why they need to change their attitudes to funding.

NORMAL IS NO LONGER AN OPTION

NICK AVELING - WWW.HANDINHANDINTERNATIONAL.ORG

Three innovations for a post-COVID world

In boisterous pubs and restaurants, crowded classrooms and parks, it's there: a sense that if we just try hard enough, we can will things back to normal. It's an understandable yearning, and in many ways a healthy one. And when it comes to what global charities and their philanthropic partners can do to help the world's most vulnerable people bounce back from the coronavirus crisis, exactly the wrong one.

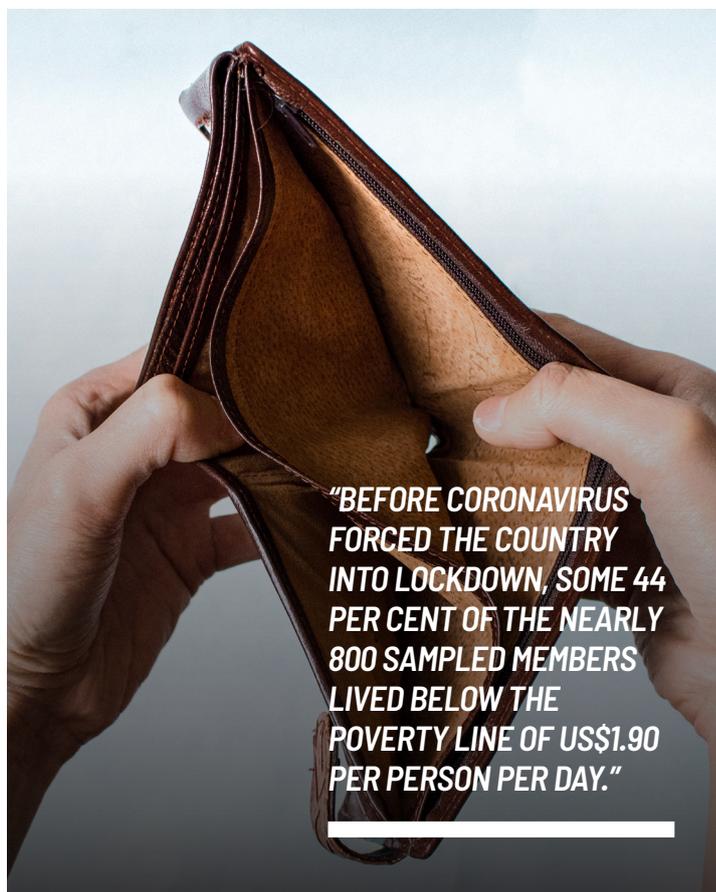
Drawing on original research and insights from across the development spectrum, this article explores an emerging central focal point in the global coronavirus response – rebuilding livelihoods in the developing world – considering three key innovations that will help us, to borrow the phrase that has come to define 2020, 'build back better'. (Or is that 'You're still on mute'?)

WHAT'S BEING DESTROYED

That coronavirus has devastated livelihoods across the developing world is not surprising. But the extent of the damage, captured in a recent Hand in Hand survey of women (and some men) working to beat the odds and succeed as entrepreneurs in Kenya's informal economy, is shocking nonetheless.

Before coronavirus forced the country into lockdown, some 44 per cent of the nearly 800 sampled members lived below the poverty line of US\$1.90 per person per day. (Countrywide, the pre-virus poverty rate was 36 per cent.) Two months later, that number had nearly doubled, reaching an eye-watering 83 per cent. A quarter of businesses had closed. Incomes were down an average of 67 per cent. And only 14 per cent of respondents had savings to see them through another month. Across the border in neighbouring Tanzania, Hand in Hand research turned up near-identical results. In Afghanistan, where we polled village leaders spread across the north of the country, acute food insecurity was ravaging whole communities.

In a world where years of progress was erased in weeks (and granted, some natural bounce-back will occur as



countries open back up) it's fair to ask whether our sector's pre-COVID approach to fighting poverty is itself another casualty of coronavirus. Can we afford to go back to business as usual, producing the usual results? Or will building livelihoods require new ideas and approaches?



NICK AVELING

INNOVATIONS

Bigger, bolder livelihoods programmes

Historically, charities and their philanthropic partners have favoured livelihoods programmes designed to support those at the so-called bottom of the pyramid, empowering women and men to launch their own micro-businesses and lift themselves above the international poverty line of US\$1.90 per person per day. Motivated by the Sustainable Development Goals' target of eliminating extreme poverty, it was a laudable mission. Then coronavirus brought whole economies screeching to a halt and proved we have to think bigger.

In some cases, charities have responded by expanding their programmes to focus on more than just boosting incomes, the metric

most traditionally used to define success. In one example, [CARE](#) and partner NGOs are also training women on social metrics such as increasing their role in household decision-making – measures that won't, the thinking goes, evaporate as quickly as incomes in the event of another coronavirus-scale shock.

Other charities are helping informal workers confront coronavirus head on. In one example of this approach, international NGO [iDE Global](#) are supporting local entrepreneurs to provide sanitation products such as water filters and handwashing devices, now more important than ever, to local communities at market rates.

Elsewhere, a new partnership in Kenya between Visa and Hand in Hand is taking another tack, broadening the remit of typical livelihoods programmes to include another key cohort that has traditionally gone overlooked: established micro-business owners selected for high-growth potential. Urban in nature, businesses in this category range from retail shops and salons to garbage collectors, upcycled-waste producers and more. All have one thing in common: the ability to lift up the communities around them by creating employment opportunities and enhancing livelihoods in a multiplier effect – a crucial piece of the recovery puzzle.

In these programmes and others, creative finance solutions will be key. Charities and their philanthropic partners should consider and pilot solutions including bigger loans, longer terms, delayed repayment periods and more.

Regenerative agriculture

For years, the world's half-billion smallholder farmers have worked in a system that encourages scale and efficiency over long-term economic and environmental sustainability – a system whose limits the pandemic laid so painfully bare. As weeks turned into months and lockdowns strangled supply chains, smallholders had no choice but to watch as global and even national markets disappeared. Not only did they have nowhere to sell their goods, they had no way to access essential inputs to plant new harvests.

If 2020 is the year old systems crumble, 2021 will be the year we look beyond consolidated, globalised agricultural supply chains to introduce regenerative agriculture to livelihoods programmes across the development sector. Centred on improving and regenerating soil health by restoring its carbon content – which in turn improves plant health, nutrition and productivity – regenerative agriculture has the potential to meet consumer demand while restoring natural environments and driving economic development. By leveraging natural farming methods, it also helps reduce upfront costs for smallholders while minimising dependence on synthetic, commercial inputs that are highly reliant on global supply chains.

Data: more, better, faster

Innovation that cannot be measured cannot be understood, much less analysed or improved. In a post- (or indeed mid-) COVID world, charities and their philanthropic partners must be able to learn and adapt in real-time, whether they're working on bolder livelihoods programmes, regenerative agriculture or any other intervention worth naming. Just as importantly, they must be able to share their learning with others in the sector, hastening the speed at which successful approaches can be brought to scale.

Investments in IT infrastructure that help charities improve, expand and expedite digital programme data collection are required to make this happen. Indeed, they are a prerequisite to effective innovation.

WHAT PHILANTHROPISTS CAN DO

In times of upheaval it can be comforting to return to old and comfortable methods.

But old and comfortable methods aren't working.

Instead, the philanthropy community should put innovation at the core of its grant-making and investment strategy, supporting global charities with a proven track-record of experimentation and the infrastructure to not only measure and evaluate the results, but to share them as widely as possible.

NICK AVELING – HEAD OF COMMUNICATIONS, HAND IN HAND INTERNATIONAL

Nick Aveling joined Hand in Hand International following a career in journalism spent principally at the *Toronto Star*, the *National Post* and *Time Out London*. As Head of Communications, he is responsible for Hand in Hand's communications and brand strategy. He holds degrees in international relations (MA, Queen Mary, University of London) and journalism (BA, Ryerson University).

Consider making unrestricted donations to trusted charity partners who can demonstrate the will – and a plan – to pilot new ideas. Make strategic investments in charities' IT infrastructure to support digital programme and data collection, so that new ideas can be understood – and adapted – in real-time. Favour innovations that stem from beneficiary feedback, because communities in the developing world understand their own specific needs better than professionals in London and Washington DC, particularly when those needs are so rapidly changing. And think very carefully about investing in supply chains, particularly agricultural ones, which would return us to business as usual.

Above all else, educate yourself on the various approaches – both competing and complementary – that will shape the coronavirus response in months and years to come. ([The SEEP Network](#) and [Business Fights Poverty](#) are two great forums to start with.)

It's too early to tell which solutions will most efficiently help the world's 2 billion informal workers regain – and surpass – their pre-COVID footing. Bolder livelihoods programmes and finance solutions, regenerative agriculture, and improved data collection and analysis are only three.

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WHAT KIND OF SOCIETY DO WE WANT TO BUILD? A CHARITY LAWYER'S PERSPECTIVE...

HANNAH KUBIE - WWW.STONEKING.CO.UK

In my locked down environment, I saw a great deal of admirable behaviour over the last 6 months. Inevitably, I was in awe of the medics and other healthcare workers that I know, often prioritising the needs of the wider public above their own and their families'. And then there were those who could easily slip under the radar of recognition; my neighbour, Liz, who arranged for everyone on my road to donate treats for the refuse collection team. They were so surprised and touched by this thoughtfulness.

I am a legal advisor to charities and social enterprises and many clients of the firm have found 2020 challenging. Some third sector organisations, though, have confronted this unexpected crisis and managed to have a huge impact. There is an opportunity now to build on recent events and embed new principles in our social sector.

I was very pleased that Danny Kruger was asked by the Prime Minister to prepare a report proposing ways that we can maximise the role of the voluntary and social sectors as part of government's levelling up agenda. His report, [Levelling up our communities: proposals for a new social covenant](#), published in September, addresses many pertinent issues but does not provide the necessary route map for change. Further, I believe that many public services are better delivered by engaged and enterprising social sector organisations, either operating locally or operating nationally but deeply invested in local communities, but this report appears not to push that belief as an underlying assumption.

In considering what kind of society we want to build for the future, I would like to focus on three areas: volunteering, innovation and collaborative working.

ENCOURAGING VOLUNTEERING IN NORMAL TIMES AS PART OF OUR GENERAL CIVIC RESPONSIBILITY

The public interest and take-up of the NHS Volunteer Responders programme was fantastic. Aside from that official programme, there were many other people who tried to use their skills and time to help the battle against coronavirus or to help those whose lives had become more difficult with the resulting changes.

Previous efforts to create significant shifts in how we see volunteering, such as the Big Society programme, failed to have the intended impact. I hope that the last few months have allowed a much wider audience to see that volunteering opportunities can be multifaceted and that volunteering can and should become a firm part of society's approach to addressing its needs.

To achieve this, charities need to appreciate and safeguard volunteers. It is well reported that volunteering, done well, is [beneficial for volunteers' wellbeing](#). Organisations also need to invest upfront in volunteer management and where possible allow opportunities to progress.

Organisations need to have clear strategies that integrate volunteering, rather than using volunteers for the sake of it. We need also to consider how better to value the contribution made by volunteers, many of whom bring specialist skills and experience. However, many third sector organisations are currently unable to articulate clearly the impact made by volunteers; professional advisors should look to develop this with their clients.



HANNAH KUBIE

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ENABLING INNOVATION

Remarkable advances have occurred historically in times of crisis, for instance in engineering and medicine. We have witnessed many innovative solutions to address need in recent months. For example, the establishment of Frontline.live, a digital platform which allows healthcare workers and others in need of PPE to go onto a platform and set out their requirements and be matched with appropriate suppliers. We assisted them to register as a charity in August. Such an idea has great potential future application.

I hope that society can retain its innovative spirit, which has been demonstrated in the last few months, when it addresses issues which may not be time critical in the same way, but are nonetheless urgent, such as social care and poverty, as well as protecting the environment. These issues were urgent before coronavirus.

Encouraging innovation requires those in power to listen and explore beyond their own backyards. It took professional footballer Marcus Rashford writing to MPs to make the government realise what an essential lifeline the continuation of free school meals over the 2020 summer holiday would be (it would be great if followed by a commitment to replicate that for future less exceptional summer holidays). I hope we can build a meritocratic society which has structures that allow good ideas to flourish. Danny Kruger's report stresses the importance of consultation throughout, but it did not go further to suggest how Westminster might meaningfully engage at a local level – central government should put this at the centre of its rebuilding methodology.

Red tape does not encourage innovation. Regulators and government bodies, whilst of course complying with the law, need to avoid simply saying “no” to something which may not reflect the status quo and should aim to accommodate innovation where there is a societal benefit wherever possible. The Charity Commission, for instance, has been very helpful in recent months accommodating urgent applications as a result of the pandemic, but can at times be seen as policing the status quo for the charity sector, rather than encouraging innovation.

Collaborative working and reassessing the value of public services

As we stood clapping on our doorsteps earlier this year, many of us had a new sense of pride in our public services.

Many people rely heavily on these services. They impact on people's lives in often deeply personal ways. Delivering public services, particularly within communities, is quite different to, for instance, delivering HS2, and that should be reflected in the way in which commissioners interact with providers.

This point has been picked up in Danny Kruger's recent report. He cites my colleague Julian Blake, who has written that contracts for human services should be “working relationship agreements”, not ways of passing liability and reducing cost. The Public Service (Social Value) Act 2011 had been intended to put social value at the centre of commissioning. Although this was important legislation, it has not achieved that. Through our clients, we regularly encounter undue conservatism within local authorities, sometimes only paying lip service to advancing wider societal benefit. Public

“ENCOURAGING INNOVATION REQUIRES THOSE IN POWER TO LISTEN AND EXPLORE BEYOND THEIR OWN BACKYARDS.”

HANNAH KUBIE – PARTNER, STONE KING

Hannah Kubie is a partner in the Charity & Social Enterprise team at law firm Stone King LLP. She advises charities and social enterprises on a broad range of legal issues, including incorporation, registrations, regulation and governance. A particular area of her expertise is advising charities on commercial matters, including partnerships and mergers, contracts and grants, and trading. She also works closely with the firm's Corporate team in the area of social finance.

Hannah trained and qualified at Linklaters, working with corporate clients. She subsequently worked with public sector clients at Capsticks prior to joining Stone King in 2010.

Hannah is a trustee of The Healthworkers' Support Foundation, a charity set up in April this year in response to the COVID-19 crisis.

procurement rules were not intended to create rigid one-way systems which cannot embrace change. Professional advisors have a role to play here too. At a local level, there must be more collaboration on the delivery of public services.

Generally, I would like us to build a society which is kinder and where people have meaningful connections. I would also like to see a society which has charities and social enterprises at the centre of designing and delivering public services, encouraging volunteering and enabling community-level innovation. I believe this approach would benefit us all.

"IF YOU ARE SOMEONE WHO COMMITS RESOURCES TO TACKLING SOCIAL AND ENVIRONMENTAL PROBLEMS, THE SCALE OF NEED RIGHT NOW CAN FEEL OVERWHELMING."



HOW SOCIAL ENTERPRISE CAN REBUILD AN ECONOMY THAT WORKS FOR ALL

ALASTAIR WILSON - WWW.THE-SSE.ORG, WWW.MATCHTRADING.COM/TRADE-BACK

The financially sustainable, high impact social enterprise model for societal change is key to our 'new normal'. What we do next to support the thousands of social enterprises and trading charities is crucial

The UK's economy is at an extraordinary moment. It presents both concern and opportunity for those of us working towards building a fairer world. The answer has always been staring us in the face. But it has taken a global pandemic for government, business and funders to take notice. The financially sustainable, high impact social enterprise model for societal change is key to our 'new normal'. What we do next to support the thousands of social enterprises and trading charities is crucial.

HARD TRUTHS

If you are someone who commits resources to tackling social and environmental problems, the scale of need right now can feel overwhelming. [Pro Bono Economics](#) predicts a £6.4bn loss of income for charities as a result of the pandemic. UK funders — trusts, foundations and corporate philanthropists — have quite rightly focused on 'emergency grants' to keep charities and social businesses afloat.

[Intel from the School for Social Entrepreneurs \(SSE\) and other UK infrastructure organisations](#) has shown us how the pandemic has hit charities and social enterprises. Many saw a sharp drop in trading and fundraising income due to social distancing.

Those working in health and social care, and community food distribution suffered huge capacity issues due to a higher demand for their services.

The socio-economic impact has been far from equal. It's left organisations dependent on trading to drive their social mission more vulnerable and harder hit than traditional 'grant dependent' charities. It has hit black, Asian and minority-ethnic-led communities and voluntary organisations hardest, as well as coastal communities and enterprises. Social sector diversity is under threat.

LIGHT IN THE DARKNESS

Yet alongside all the trauma and difficulty, we have seen innovation. We have seen individuals and organisations rise to the challenge like never before. The social entrepreneurs we support have pivoted to deliver essential services and frontline aid to those most vulnerable in the pandemic.

Social entrepreneurs are, as the name suggests, entrepreneurial by nature. They spot opportunity and create solutions, generating income to tackle social problems. Take Josh Turner, founder of social enterprise Stand4Socks. Usually, Josh donates a pair of socks to a homeless person for every pair



ALASTAIR WILSON



of socks sold. As the COVID-19 crisis took hold, he spoke to NHS workers and discovered PPE only goes down to people's ankles. People working in hospitals needed anti-bacterial socks. He developed the new "Health Heroes" [sock](#), and for every pair bought, one pair is donated to a homeless shelter and another to an NHS worker.

There are [many more examples like this from social enterprises we support](#).

Darren Howie's start-up Sacred Bean Coffee has been distributing "hampers of hope" to vulnerable groups across Derby. In India, Greyshades rapidly developed a volunteer network to support the high-risk elderly groups they usually work with.

Forest of Hearts, in Warwickshire, [was just about to start a garden project with Stratford NHS hospital when lockdown hit](#). It usually supports people with poor mental health and those who are unemployed. With the garden launch postponed, founder Carole Longden engaged volunteers via mail-out seed-growing kits and a new WhatsApp group. This garden-from-home approach has ensured the group can continue to develop their skills, while connecting them in a time when many would otherwise be isolated. She's also set up an online shop selling growing kits, to keep revenue coming in.

HOPE FOR THE FUTURE

These solutions are in response to a crisis. But there is so much we can learn from them for the future.

The overnight plummet in income has forced many charities, large and small, to make redundancies and reduce services. But social entrepreneurship encourages organisations to pivot in times of need. If donations drop, you find a way to generate income through trading and sales. If you can't support people as you would in normal circumstances, you prototype new ways to offer them a lifeline in times of need.

As the UK seeks to forge a path forward, social entrepreneurship can help us rebuild an economy that works for all. Social enterprises [contribute £60 billion](#) to the UK economy and employ an estimated two million people. Many of those employees come from the most vulnerable parts of society. [One-third of social enterprises](#) serve communities within the top 20 per cent of the most deprived areas of the UK. Two in five social enterprises seek to employ from disadvantaged backgrounds, such as those with disabilities, care leavers, ex-offenders, homeless people and veterans (Social Enterprise UK).

Social entrepreneurship can help charities to develop their income from trading, supplementing donations from elsewhere. And social enterprises themselves can rebuild local economic growth, often while employing those most disadvantaged in the labour market.

ALASTAIR WILSON – CEO, SCHOOL FOR SOCIAL ENTREPRENEURS

After being a student in the School for Social Entrepreneurs' (SSE) very first cohort in 1998, Alastair went on to work in homelessness and international development, before returning to SSE in 2003.

Since then, SSE has grown into a national and international network, supporting 1,000+ people a year in developing the skills, strengths and networks they need to tackle society's biggest problems.

Alastair is the pioneer of Match Trading® and Trade Back grants, specifically designed to support the trading resilience of social enterprises. Alastair is also the co-founder and director of Tonic Living, which is looking to develop a fresh approach to LGBT elder living. He is a trustee of the Sheila McKechnie Foundation and The Cabrach Trust, and has previously held trustee roles at Social Enterprise UK, UnLtd, Access – The Foundation for Social Investment and the Akram Khan Dance Company.



MAKING CHANGE HAPPEN

As we move into a recession, the public purse and all social impact financiers need to spend their decreasing funds wisely.

How can trusts, foundations, corporates and philanthropists best support this social entrepreneurship approach to building a new, fairer economy?

Charities and social enterprises need grant funding and philanthropic donation, to indemnify the cost of support for society's most vulnerable, especially where they work in disadvantaged places. But they also want and need to trade to be sustainable.

We must administer grants and philanthropic donation in a way that encourages the trading ambitions of social enterprises and charities and reduces grant dependency. Ultimately this is about a shift in power in favour of communities – enabling organisations to create innovative, market-based solutions to the issues they identify.

SSE's Trade Back grants are one tool that could help create sustainable social and environmental change by backing community solutions. Trade Back is a new type of grant that incentivises social organisations to trade, while supporting them to recover and rebuild. Grants match 'pound-for-pound' any increase in trading above COVID-period levels. Trade Back draws on the learning from [Match Trading grants](#), which launched in 2017. These grants have supported over 500 social impact organisations.

The results have been astonishing. On average they've increased their trading income by 64 per cent – that's 2.5 times the growth rate compared to those receiving traditional grants.

Other approaches include [crowdfunding](#) and [blended finance](#) (a combination of grants and loans). Meanwhile the UK government also provides a [social investment tax relief \(SITR\)](#) scheme to incentivise investors to buy shares or invest in trading charities and social enterprises.

Social sector organisations are key to the new, fairer economy. Let's not go back to how we've always administered grants and donations. Let's use funding innovations which are congruent with organisation's trading ambitions to amplify the financial support the sector needs.

"WE MUST ADMINISTER GRANTS AND PHILANTHROPIC DONATION IN A WAY THAT ENCOURAGES THE TRADING AMBITIONS OF SOCIAL ENTERPRISES AND CHARITIES AND REDUCES GRANT DEPENDENCY."

CORPORATE PHILANTHROPY

KATYA VAGNER - WWW.FLADGATE.COM

Whilst supporting others during a crisis may seem counterintuitive short term, the evidence suggests that those who do so are giving themselves a much greater chance of remaining viable for years to come

Businesses are continuing to experience unprecedented times of uncertainty. Many businesses are finding that they must, with help from their professional advisors, re-evaluate their practices substantially. Now is a key time for companies to review corporate values with a view to building a kind of society which can help to ensure longer-term financial sustainability. This article considers how corporate philanthropy, which is often overlooked or downplayed, can greatly assist as part of this exercise.

Business are fighting fires on all fronts and are understandably focusing on short-term matters — on staying afloat and balancing resources. Many business executives are facing pressures from investors to maximise short-term profits. Equally there will be increased pressure and focus to further commitment to Corporate Social Responsibility (CSR). Many focus on the former rather than the latter, but this would be a mistake longer term. There is no quick and easy fix; simply giving more money will not be enough — instead businesses need to make philanthropy a core value, and now during the crisis, counterintuitively, is the time to do so. Longer term, this will help economically as well as with the image of the company.

SHORT-TERM VS LONG-TERM SUSTAINABILITY

Whilst there are some emergency funds to help businesses and individuals, reliance on handouts alone will not be sufficient. There is simply not enough to go around, and demand is high. What is new, however, is the focus of government, businesses and the public on taking this opportunity to adopt long-term strategic initiatives, rather than focusing on short-term, one-off fixes.

This can be seen in the substantial interest in [B Corporation Certification](#), and the increased number of businesses obtaining B Corp status. At the time of writing, there were 3,499 B Corp organisations in 74



“WHILST THERE ARE SOME EMERGENCY FUNDS TO HELP BUSINESSES AND INDIVIDUALS, RELIANCE ON HANDOUTS ALONE WILL NOT BE SUFFICIENT.”

countries, 315 of those in the UK, including household names. This trend is only set to continue and open up a wider range of creative opportunities for the charities sector. Corporate philanthropy will become a key part of that.

UK VS US

The UK is some way behind the US when it comes to charitable giving — the US coming in at number one on the [CAF World Giving Index](#), and the UK sitting at number seven — but that is set to change in the coming years. Corporate philanthropy, especially in the US, has been growing and has become a large part of the charities sector, influencing the entire globe. Donations by corporates, and corporate giving as a percentage of profits, [continue to increase in the US](#).

The latest picture in the UK is mixed — whilst total [donations by the FTSE 100 companies](#) have continued to fall, [corporate foundations are more active](#) in the sector and the overall percentage of profits donated has been increasing. As with non-corporate philanthropy, the UK is slowly shaping its own UK model of corporate giving, and this will only grow in the coming years.



KATYA VAGNER

WHAT ARE THE BENEFITS?

The benefits of engaging in corporate philanthropy are well documented but are not always immediately obvious. For many companies, doing so can offer sustainability and growth in the following ways, even during a crisis:

Brand awareness and reputation: individuals, employees, and other businesses are becoming increasingly picky about who they do business with and work for. A business's reputation for spearheading positive initiatives is going to improve its standing in the eyes of its employees, customers, partners and the community at large. For example, see [Making the Business Case for Corporate Philanthropy](#) from the Harvard Law School Forum on Corporate Governance.

Employee engagement: philanthropic initiatives help create wider impact, increase employee engagement and can greatly improve productivity. A business is only as strong as the people it attracts. Matching gift programmes (especially popular in the US, offered by the likes of Apple, [General Electric](#), Soros Fund Management) can be particularly engaging for employees and promote the business through word of mouth. In turn, this helps businesses attract top talent. Employees increasingly measure the success of their careers not only in terms of climbing the corporate ladder but the positive impact their work has on the world around them. Employee engagement helps businesses thrive even during hard times.

Customers/market growth: customers are increasingly selective about which businesses they turn to, and often carefully research the longer-term consequences of their choices. Businesses with broad societal focus are increasingly benefitting from this. [Their customers are likely to be more loyal to them](#) in the post-pandemic climate.

Tax deductions: businesses often give, focusing solely on financial and tax gains. It is undoubtedly positive that helping charitable causes provides economic reward, including a number of tax reliefs and deductions, but it shouldn't be the end-all. It can be argued that the UK does not have as generous a tax framework as the US, but the UK model is not far

behind and is on the radar of the various government departments, who are continually evaluating it and thinking of potential ways to improve it. This trend will continue after the crisis.

Embracing tech-based solutions: legacy working habits can impact corporate giving negatively – even large organisations may rely on manual processes. (Research by [BizGive](#) suggests that up to 25 per cent of annual donations budget is spent on administration.) [Technology and digitalisation](#) can remove many limitations in philanthropy. Charities and funders are [making use of technology](#) in many ways, including to tackle social problems and to engage with their supporters. There are tech-based solutions for businesses to help them do the same, eg, [BizGive](#) and [Benevity](#).

Supporting causes and community: And last but not least, corporate giving, especially in the post-pandemic climate, helps to address the immediate needs of people in desperate circumstances. The reach that businesses can have on a global scale [should be harnessed](#). It can help bring meaningful change to more complex problems longer term. Shorter term, it also benefits the economy and the charities sector. Helping people and businesses in their time of need will not be forgotten and may lead to strong future allegiances, paying for itself if the tables turn.

PROFESSIONAL ADVISORS MUST DO THEIR PART

During these unprecedented times, cutting philanthropic activities may be seen to be an easy cost-saving target for many businesses. Funding may be cut short term in the hope that things may eventually pick up (as per post the 2008 financial crisis). However, for those businesses that still can, maintaining philanthropic focus will provide longer-term stability.

For businesses that are not currently able to donate, they should still take this time to think about their longer-term intentions and do what they can: i) to ensure that many deserving projects and causes can continue in the meantime, and ii) to consider what they might be able to do in the future once they become more stable. Many businesses can continue to deliver real impact even within a limited

budget. Starting small is key and can lead to broader initiatives at a later stage.

Professional advisors have a key role to play, in discussing the available options with businesses and putting forward the longer-term benefits of philanthropic giving.

CORPORATE PHILANTHROPY FOR LONGEVITY

The best corporate philanthropy initiatives often align organically with the company's business goals, culture and values as a natural extension of what drives why they do what they do. Businesses should be encouraged to take the opportunity during this crisis to contribute to the kind of society they want to build and be a part of. It should be a society in which the focus is on thinking longer term, how everyone can do business better, and looking beyond short-term profit or discrete giving.

Whilst supporting others during a crisis may seem counterintuitive short term, those that do so are giving themselves a much greater chance of remaining viable for years to come. They are investing in longer-term growth and sustainability, economically and reputationally.

KATYA VAGNER – ASSOCIATE, FLADGATE

Katya Vagner (Ekaterina) specialises in advising on a wide range of UK and offshore private client and charity legal and tax matters.

Katya advises individuals and business owners, their families, family offices, trustees, personal representatives and charities across the globe on issues such as: estate and succession planning, setting up and advising on onshore and offshore structures, incapacity planning, administration of trusts and estates, philanthropic strategies and a range of legal and tax issues affecting charities. Katya has a keen interest in ESG initiatives and has a growing charities and philanthropy practice, with particular interest in advising on the structuring of UK and cross-border charitable giving and governance matters. Katya has been named as one of the [privateclient's Top 35 under 35 private client advisors in 2020 and 2019](#).

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QUESTIONS TO BE ADDRESSED ON THE COURSE:

- What can fundraisers learn from advisors to change the way they view wealthy donors and philanthropy?
- Who are professional advisors and what motivates them? How can you as a fundraiser work together with them to help meet their client's needs?
- What is the spectrum of advisors and what are their roles?
- Managing expectations of fundraisers.
- What internal and external challenges do fundraisers face in this process?
- How can we make the fundraising sector more innovative and a space for collaboration not just competition?

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To learn more about this course contact
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