

Background information

Charities Aid Foundation (CAF) is one of the oldest and largest charities in the UK with over 80 years' experience in helping charities and donors to achieve social impact. We do this through working with donors to help them plan their giving, and with charities to build their capacity. CAF is comprised of CAF Bank, CAF Venturesome and CAF Philanthropy Services.

CAF Philanthropy Services offers advisory and transactional services to individual, family and business donors globally to optimise their impact. We work with them from the beginning of their philanthropy journey, through developing their giving or corporate social responsibility strategy, to delivering grant programmes and donations on their behalf. We have worked with over 70% of the FTSE 100 and almost 3000 HNW and UHNW individuals and families who hold between £50,000 and more than £100million in philanthropic capital with CAF. This gives us a thorough understanding of what motivates and engages donors, and what convinces them to support one particular charity over another.

The offer under Enhance

CAF Advisory will deliver bespoke consultancy to charities with a view to developing their strategy for income diversification, with a particular focus on increasing the level of giving to your charity from high net-worth individuals and corporate donors both in the UK and internationally. We have particular experience in working with small and medium-sized charities, focussing our impact on the sector in this area.

Stage 1: A scoping call and 1 day facilitated workshop.

The initial offer will include a scoping call with your charity followed by a one-day facilitated workshop with your charity's senior leadership team/trustees. This workshop will allow CAF to fully understand the organisation's needs, capacity and ambitions and identify whether further support would be helpful and proportionate for the organisation. At the same time CAF will provide the organisation with an overview of the corporate/major donor space and a set of recommendations after the workshop so that, even if the work doesn't progress to the more comprehensive 'stage 2', they are better able to understand the enabling factors for attracting corporate and major donor income and why they are not currently in a position to make best use of CAF's support in this area. At the end of the workshop a joint decision between your charity and CAF will be made about whether stage 2 would be appropriate.

Stage 2: Bespoke consultancy.

CAF Advisory will deliver bespoke consultancy to charities with a view to developing their strategy for income diversification, with a particular focus on increasing the level of giving to your charity from high net-worth individuals and corporate donors both in the UK and internationally. We have particular experience in working with small and medium-sized charities, focussing our impact on the sector in this area.

Although bespoke to each organisation and developed during stage 1, the work is likely to include:

- Mapping the proposition
- Developing the case for support
- Prospect Research
- Approach Strategy and Evaluation

Typically stage 2 will take an average of 6 days, but the precise time and nature of the assignment will be agreed in partnership with your charity and if appropriate, the Foundation Manager, during an initial scoping call. Where charities already have resource behind specific areas, CAF Advisory aims to complement and enhance, rather than deliver a set programme of work.

Our approach is to act as an extension of your charity's own team, sharing strong client and market insight. We work collaboratively, engaging clients and their stakeholders to build consensus and commitment to the selected approach, ensuring that any changes and new developments are owned by you and are sustainable. We seek to build organisations' capacity, not to create dependency on CAF as consultants.

How do I know if this provider is right for my charity?

CAF Advisory works best when your charity has the capacity and desire to explore how it moves from a current funding source(s) to a broader base of support and / or new funding model.

Our offer is unique because:

- we understand the global and national context for philanthropic giving by individuals and corporates, working on what motivates donors to give and how charities can drive understanding of their cause
- we understand and contribute to the wider policy context in which your charity operates and use this to inform our fundraising advice

“From our charity's perspective, the work with CAF has been vital. The team have supported us over a critical period in our development and brought the following key benefits:

- Providing an objective eye to assess how we articulate what we do; enabling us to be more successful at communicating with a wider range of funders and stakeholders more generally
- The workshops provided a valuable space and frame within which we were able to bring the trustees and executive together. This raised some important issues which have ultimately strengthened and unified the organisation considerably
- Acted as a critical friend – raising issues of concern [impacting our fundraising strategy]

Input needed from you

- Your charity should commit to a member of the Senior Team taking the initial scoping call (typically 1 hour duration)

- Appropriate level staff and/or trustee time in attending the stage 1 workshop (to be determined in the initial scoping call)
- Appropriate level staff and/or trustee time in the stage 2 process (to be determined in the initial scoping call)
- Potentially releasing key documents (to be kept confidential by CAF Advisory and determined in the initial scoping call)
- Recognition that working with CAF Advisory might require an investment of time following the time spent working together, implementing and further action required; although this is at your own discretion