



EUROPEAN ANTI POVERTY NETWORK

# Optimus for the European Anti-Poverty Network

How to launch a successful « Major Donor » strategy in 2012

# 1. Who we are and our references



“Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has.”

**Margaret Mead (1901-1978)**

# Optimus:

an independent major player in fundraising  
and non-profit communication since 1989

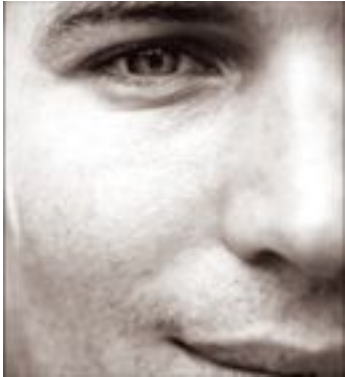
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- A unique partner serving:
  - associations and foundations,
  - universities and academic institutions,
  - cultural organizations,
  - general interest groups,
  - socially responsible business...
- Missions:
  - First and foremost, to raise funds and develop resources for non-profit organisations.
  - To challenge, educate and earn the loyalty of the public to a cause
  - Change behaviours.
  - Develop partnerships with media, institutions and corporate businesses
  - Promote general interest projects and/or programs.

# La communication de mobilisation<sup>®</sup>

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- A combination of marketing and communication techniques to encourage behaviours in:
  - donors,
  - citizens,
  - opinion leaders,
  - corporate partners,
  - patrons
  - alumni...

... around a cause, a project or a socially responsible brand.

- One key objective: increase resources and profitability, via the most relevant fundraising activities and communication tools.

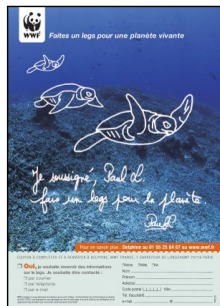
# Optimus : 7 areas of expertise for 360° Fundraising

QualiData 2.0

7/ Database and donors relations



6/ Fundraising events



5/ Legacy Program

4/ Public Communication

- Media
- Word of mouth



Fundraising  
360°

3/ Online Marketing

- Fundraising
- Viral campaigns
- Advocacy tools
- Personal fundraising platforms

1/ Relationship marketing and operations

- Direct marketing
- Telephone marketing
- Monthly giving programme



2/ Major donor program and Capital campaign



# Our references



# A recognition for our « Major Donors » expertise among the social sector (on-going clients)

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## 2. Our work with EAPN



# Our strategic approach

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- **The priority is for us to first « fund the Fund » : raise the needed resources within a relatively short lead-time.** The most appropriate way to do so is to **mobilize “major donors”** through the appropriate positioning and speech, and within a specific involving offer (counterparts).
  - Once these supporters are involved, they will themselves open their networks to the EAPN Fund, grow the circle, and create a community of interests in favour of the cause which EAPN defends. (“peer-to-peer”)

## ➡ **Phase 1 (6 months , on-going) : Preparation, definition and validation**

Through qualified interviews with key members of the EAPN, some of their current financial supports, and potential future donors :

- Identify the strengths and the weaknesses of EAPN’s approach towards major donors
- Measure the potential of funds that can be raised from these targets (on a multi-country basis)

# Why a preparatory phase ?

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**This “Phase 1” allows us to answer the following key questions:**

- How to talk about the EAPN Fund (case for support)  
What are the vision, missions and values of the EAPN Fund? How is it perceived today?  
What strengths/weaknesses?  
What are the strategic projects for which the EAPN Fund will ask some support?  
What kind of involvement the EAPN Fund is ready to offer potential donors?
- What are the fundraising objectives of the EAPN Fund? What leadtime ? What expected results?
- Identify the sources of private funding  
What types of potential supporters : focus on individuals and possibly foundations? What potential for each?  
What are the most promising countries within Europe and the EAPN network?

# 4 objectives of Phase 1

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## 4 goals :

1. Building the « case for support » for the EAPN Fund
2. Identifying and qualifying the best prospects
3. Testing and validation of the case for support
4. Recruiting the first members of the Campaign Committee

**Duration : 6 months, ending March 2012**



### 3. The Case for Support



# Building the « case for support » for the EAPN Fund

## - The Principles

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- « Case – the reason why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs, and plans » - NSFRE Fund Raising Dictionary
- Principles of the content of the EAPN case :
  1. What is the problem to solve ?
  2. Why is the EAPN legitimate to solve it ?
  3. What is the concrete project the EAPN will build to solve it ?
  4. How much money do the EAPN need to build this project ?
  5. What will be the role of the donors to the EAPN ?

# Building the « case for support » for the EAPN Fund - The Methodology

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- **Desk research:** Analysis of the documentation from the EAPN, the actions and communication tools, the way media or internet relay its actions...
- **Individual interviews (x3)** with M. Horemans, M. Susias and M. Marguery
- **Benchmark** of 4 organisations involved in the same cause, national and/or multi-countries : ENAR, Notre Europe, Caritas Europa, European Cultural Foundation.

➡ From the existing positioning of EAPN and its Fund, we have built a specific “case for support”, the tool that will serve as a basis for the interviews with potential donors. We have highlighted the main projects which have the potential to inspire the right profile of philanthropists.



# EAPN Europe

INVEST IN A MORE SUSTAINABLE EUROPE  
FREE OF POVERTY



**EUROPEAN ANTI-POVERTY NETWORK  
RÉSEAU EUROPÉEN DES ASSOCIATIONS  
DE LUTTE CONTRE LA PAUVRETÉ ET L' EXCLUSION SOCIALE**





# I. Facing up to Poverty in Europe



## A future for Europe as a « third world »?

- The decrease of Europe's power can be noticed in the development of major corporations in the emerging markets, in the evolution of global demography, in the increased influence of the emerging countries within International negotiations, and, of course, in the **growing amount of data released everyday about poverty in Europe.**
- During the past decades, European politicians have become increasingly focused on the economic factors, forgetting the social agenda. But if Europe continues with this narrow market-driven approach, **we risk losing all the social benefits and the tradition of welfare** that used to define Europe. Our social standards and practices could become as outrageous and unfair as the ones we currently denounce in other parts of the world.

➡ **It's in Europe's hands to shape its own future: Europe must choose a more social and sustainable approach.**



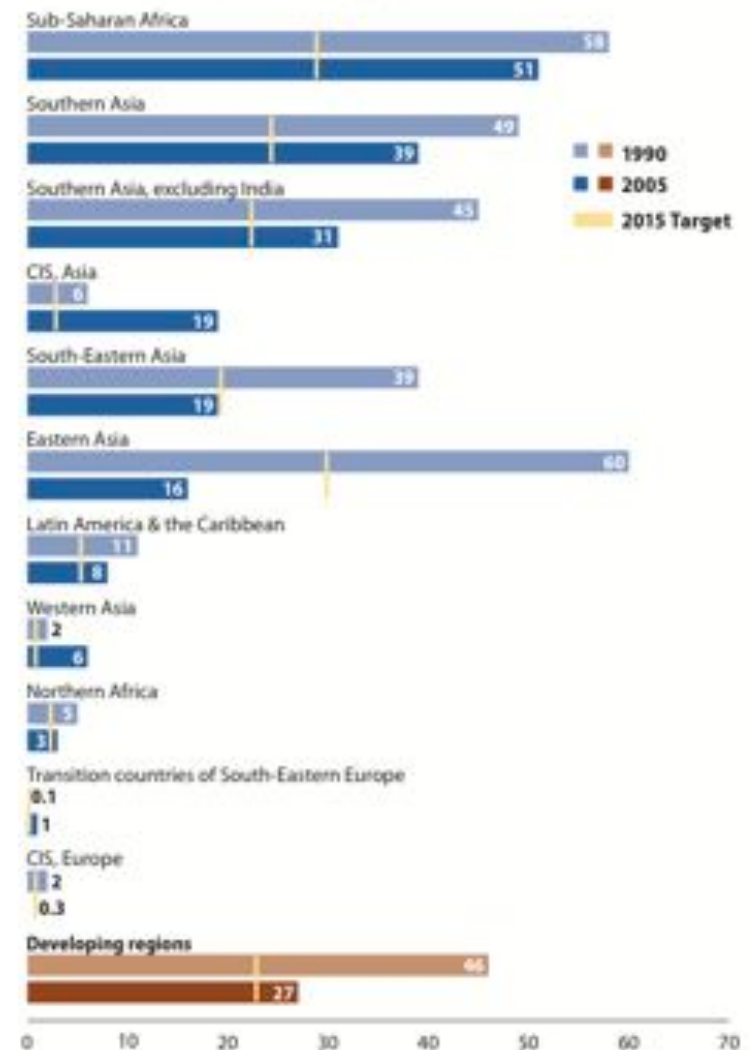


# Facts and Figures about poverty and inequality

## Worldwide :

- 50% of the world population live with less than \$2 of daily income (which represents only 5% of the global income).
- The main aim of the Millennium Development Goals (UN) is to eradicate extreme poverty and hunger. The concrete objective is, by 2015, to cut by half the number of people who live with less than \$1 per day.
- According to UNICEF, 22'000 children die each day due to poverty and its consequences.

Proportion of people living on less than \$1.25 a day, 1990 and 2005 (Percentage)



Source : 2010 data from UN about the MDGs



# Facts and Figures about poverty and inequality

## Europe :

- In 2009, **1 out of 6 European citizens** (= 80 million people) was assessed to be at risk of poverty and social exclusion ! Under the new Europe 2020 strategy, this figure is further enlarged to **120 million people** because of the combination of 3 indicators. And the raise due to the crisis isn't included yet. (source: Eurostat 2009)
- There are wide inequalities in the distribution of income:
  - The gap between rich and poor has grown in more than three-quarters of OECD countries over the past 2 decades. (OECD study 2008)
  - In 2009, the 20% of the population with the highest disposable income received five times as much income as the 20 % of the population with the lowest equivalised disposable income.

 The fight against poverty in Europe and the fight against poverty globally are actually **part of the same struggle !**



# Putting faces to the reality of poverty and social exclusion

« *Social exclusion* » = processes in which individuals and entire communities of people are systematically blocked from rights, opportunities and resources that are normally available to members of society and **which are key to social integration.**

➡ Daily struggle to live a « normal » life ; multiple challenges such as : unemployment, low salary, unsanitary housing, no access to healthcare or education, exclusion from social activities (culture, sport or leisure), exclusion from civic engagement and democratic participation,...

➡ As a consequence : **extreme vulnerability** (health risks, mental distress, isolation,...)

- In 18 European countries, people in lower socioeconomic groups tend to live between 2 and 8 years less than people in higher socioeconomic groups.

Source: Economic implications of socio-economic inequalities in health in the European Union, European Commission report, 2007

*« I have lost some friends because I cannot participate to their activities. Even participating to support groups requires time and money. I don't have time nor money to participate to some discussions »*

Source : 6th European meeting of People Experiencing Poverty (EAPN)



# Putting faces to the reality of poverty and social exclusion

**A poverty and social injustice that are now expanding to new populations :**

Diverse forms of poverty are being experienced all across the EU and require new instruments of understanding in order to be held down and curbed.

We now count more & more **workers** who are poor (vs. unemployed), and people who did not expect their sudden poverty, such as managers, craftsman, shop-owners, etc. We also note an increase in the poverty amongst the **young generation**.

And people who lived in poverty already for generations have got an even harder life than before.

- The 2009-2010 Report of French National Observatory of poverty and social exclusion notes an increase in poverty among workers in France between 2004 and 2006. In 2007, 6,7 % of the French labour force (1,7 million people) is assessed to be poor.

*« I have to admit that I work illegally and this is not because I am a bad person. I am fully aware of the consequences, but this is the only job I have found »*

Source : 6th European meeting of People Experiencing Poverty (EAPN)



## Rising risk for instability

- Growing gaps between countries of the EU, having a negative impact on the collective growth
- Increasing internal political tensions :



### Focus: **Spain and *Los Indignados***

- Demonstrators are protesting Spain's 21% unemployment rate (45% among the youth) and a record 4.9 million jobless.
- Grass-roots movements fueled by social networks: between 6.5 and 8 million have participated in these protests, demanding jobs, better living standards, a fairer system of democracy and changes to the government's austerity plans.

change country to fit the  
residency of each prospect

*"They want to leave us without public health, without public education, half of our youth is unemployed, they have risen the age of our retirement as well. This is an absolute attack on what little state welfare we had."* - Natividad Garcia, protestor



# Rising risk for instability



Greece, 2011



Hungary, April 2011



Italy, October 2011



Events in 951 cities in 82 countries



Spain, May 2011



Belgium, June 2011





# Social inclusion as a solution to Europe's crisis

Poverty and social exclusion are a reality in Europe, starting to put its very security at risk. Loads of data and testimonials prove the current lack of social justice in Europe ; **yet, this issue has been ignored or mishandled by both public opinion and politicians** in the past decade.

**Realising social inclusion is part of the solution to Europe's crisis.** All EU citizens need social policies to protect them now, when facing societies that are more and more precarious

Social exclusion is NOT an irresolvable problem ; and it's **everyone's responsibility** to ensure social justice and the empowerment of people experiencing poverty.

In order to ensure a better allocation of resources and **bring back social inclusion high on the political agenda** of the EU Commission, there is an urgent need to build up moral influence and **SPEAK WITH A STRONG UNITED VOICE**.

 **Let's make a political choice today and fight for our social welfare model to survive, and for a future in which social justice is kept as a major pillar of our society.**



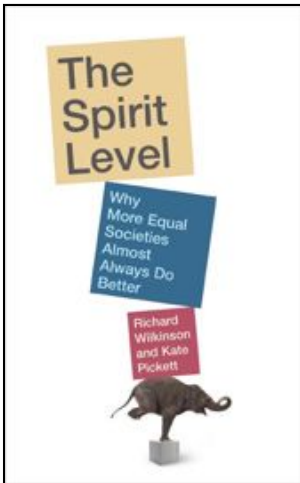
## II. There are Alternatives!!



# More equal societies are better for everyone !

The evidence deriving from inequality studies in the 50 richest countries of the world suggests that:

- **Societies with smaller income differences between rich and poor are more cohesive:** community life is stronger, levels of trust are higher and there is less violence. The vast majority of the population seem to benefit from greater equality.
- A society that works for the prevention of poverty and social exclusion is an economically richer society that can **allocate its financial resources in sustainable development and social cohesion**, without spending its resources in trying to counteract the outcomes of poverty and social exclusion.
- Getting even richer makes little or no difference to the prevalence of health and social problems in comparatively wealthy countries, but getting more equal does.



(R. Wilkinson « *The Spirit Level: Why more equal socities almost always do better* », 2009)



# More equal societies are better for everyone !



There is a strong correlation between having a good social policy and being able to resist to an economic crisis and ensure everyone's security.



**We need to shift our attention from increasing quantitative growth and material wealth, to the social environment and the quality of social relations in our societies.**



# EAPN: a key player in the battle against social exclusion

- **Social welfare as a vision of society :** The European Anti Poverty Network (EAPN) is an independent network of NGOs and groups involved in the fight against poverty and social exclusion in Europe. EAPN is a network of:
  - 30 national networks of voluntary organisations and grassroots groups (30 countries represented)
  - 23 European organisations (Caritas, Emmaus, Red-Cross, Save The Children, ...)
- **EAPN's mission**
  - To promote and enhance the effectiveness of actions against poverty and social exclusion
  - To help shape social policies and design action programmes
  - To lobby for and with people and groups experiencing poverty and social exclusion

*examples to be tailored according to the country of the prospect*





# EAPN: a key player in the battle against social exclusion

- **EAPN in action**
  - Advocacy and campaigns (lobby)
  - Analysis
    - Close review of the EU policies and programmes likely to impact on groups facing poverty and social exclusion
    - Links with the research sector in order to enhance knowledge of poverty and social exclusion within the EU
    - Proposals to influence the EU institutions
  - Information ([www.eapn.eu](http://www.eapn.eu) as the reference portal in Europe, publications, magazines,...)
  - Exchange (task forces and transnational seminars on national policies for social exclusion)
  - Training for EAPN's members





### III. EAPN's unique contribution:

**FIND NEW PERSPECTIVES TO  
ERADICATE POVERTY IN  
EUROPE**



# Toward a social European Union

- One of the objectives of the Strategy Europe 2020 is to reduce by at least 20 million the number of poor people in the European Union within the next decade.
- EAPN's credo: **create a good life for all**  
EAPN is convinced that **eradication of poverty is possible in Europe** through a concerted action of all its stakeholders that will result in :
  - the European citizens being aware and well-informed about the need for a more equitable allocation of resources
  - a social European Union free from social exclusion, ie :
    - equitable allocation of income, resources, and opportunities
    - access for everyone to quality jobs
    - high level of social protection
    - no discriminations (gender, culture, religion, social, age, handicap, etc)





## **3 priorities to create a more social and sustainable Europe**

- To achieve this vision, EAPN chooses to focus on 3 priorities for the coming period:
  1. Building the capacity at National and EU levels
  2. Building and sharing knowledge about what works
  3. Empowering people living in poverty and bringing unknown practices to light.



# 1. Building the capacity at National and EU levels

To ensure the impact of its lobbying activities, EAPN must reinforce its presence « on the ground », both locally (countries) and where the decisions are made (European Union, ie Council, Commission and Parliament). Politicians will be more incline to follow EAPN's recommendation and proposals once EAPN becomes more deeply enrooted in the field and represents the voice of a large portion of civil society. Thus, we need:

- 1 staff person per country who will help ensuring :
  - accurate and regular information from « the field » (local level)
  - a better coordination between the 30 members of the EAPN (sharing experience on how to deal with governments etc...)
  - an active engagement of the expertise of its members in EAPN's structures and working methods
- A solidarity fund to support the work of European Organisations in membership of EAPN.

**€ 1.5 Million per year in 5 years**



## 2. Building and sharing knowledge about alternatives that work

One of the key roles of EAPN is to collect the knowledge and spread the awareness of **social and sustainable alternatives**. EAPN needs to show how these alternatives are working in practice, not just in theory. EAPN needs funding to ensure:

- Learning from practices outside Europe
- Building alliances with different organisations, sectors and movements within Europe
- Effective lobbying on the EU decision makers at both National and EU levels

Example of a concrete action that could be implemented:

« *Biennial Prize for Innovation from Transnational Learning in the Fight against Poverty and Social Exclusion in Europe* » - awarded in 3 categories: NGOs, governments, other stakeholders (businesses, foundations, universities)

€350,000 per year in 5 years



### 3. Empowering people living in poverty and bringing unknown practices to light

For people experiencing poverty to recognize EAPN as their Network, EAPN needs to provide a space for exchange, debate and learning on practices and policies to fight poverty and promote a better distribution of wealth among our civil societies

Several projects could be implemented:

- A public campaign (ex: [2010 European Year Combatting Poverty](#) , [Ensure an Adequate Minimum Income for all](#) )
- A study/publication (ex: « A European Agenda for Skills and Jobs: Looking beyond skills to build inclusive labour markets! », « Active Inclusion: Making It Happen! »,...)
- More transnational meetings of people and activists experiencing poverty (ex: in preparation of the *Annual European meeting of People Experiencing Poverty*)

€150,000 per year in 5 years





EAPN  
Campaigns:  
Example 1



COALITION OF SOCIAL NGOS ACROSS EUROPE
EUROPEAN YEAR FOR COMBATING POVERTY AND SOCIAL EXCLUSION

# 2010 BUILDING A EUROPE FOR ALL

"stealing our future by keeping us out of touch with the knowledge-based society" - "hard to talk about, but wh

HOME

About the COALITION

About the YEAR

What is POVERTY ?

What we WANT

NEWS and media

Resources for the media

Calendar of EVENTS

COUNTRY focus

Take ACTION !

The EY 2010 NGO Coalition is being coordinated by EAPN

[info@endpoverty.eu](mailto:info@endpoverty.eu)

2010 EY closing conference

The 2010 EY officially closed on 17 December in Brussels. Find here evaluations and the Activity Report!

2010 European Year assessment

The European Economic and Social Committee (EESC) and the 2010 Coalition of Social NGOs held a joint hearing on 22 November 2010.

Successful Human Ring!

Thousands-strong solidarity ring encircles European Parliament. Check out here all the information and pictures!

2010 Coalition website: [...]

This website now serves as a stock information and documentation about the 2010 European Year against Poverty and Social exclusion. For any question, you can also contact EAPN, the coordinator of this website, at [info@eapn.eu](mailto:info@eapn.eu).

Welcome to our website !

2010 was designated European Year for Combating Poverty and Social Exclusion. This website provides visibility to the NGO activities and demands in relation to the EU Year for Combating Poverty and Social Exclusion 2010. It intended to mobilise associations and individuals to generate political pressure to step up policies against poverty and social exclusion and poverty at European and national level.

What you can find

You can hear directly from those most directly affected by poverty in the 'voices of poverty'. This website is also full of useful information about what NGOs across Europe want for the outcomes of 2010, their activities happened at European and national level during 2010, focus on country information, as well as links to key events being organised by the European Commission and by the National Implementation Bodies.

What you can do

Everyone's involvement is important. This is why the website provides direct links on other campaigns.

CALENDAR OF EVENTS

COUNTRY FOCUS

TAKE ACTION !

USE OUR LOGO

VOICES OF PEOPLE FACING POVERTY IN EUROPE

2010 European Year for Combating Poverty and Social Exclusion

EAPN is supported by the European Commission

King Baudouin Foundation

This website is supported by the King Baudouin Foundation





# Ensure an Adequate Minimum Income for all!

## Appeal

Click on the flag of your country to read this appeal in your language and to access more information on the campaign at the national level

Around the corner from your home, someone will be making the difficult choice between eating and heating, worrying about their rent, dreading the next knock on their door, wondering how to make each euro go the extra mile.

The increasing stigmatisation of welfare recipients as lazy and the labelling of social benefits as passive hand-outs only worsens the situation for the 79 million people in the EU facing poverty, forcing them to face unbearable choices every day. Ensuring Adequate Minimum Income Schemes is the key way to changing this reality and to building a solid foundation for participation in society, where all can have access to a dignified life. In the context of increasing financial turmoil and economic insecurities, more and more families will need to rely on social assistance as the only ray of hope to build a secure future.

We the undersigned express our concern at the current threat to social protection systems in Europe. We declare our support for the 2008 European Commission "Recommendation on the active inclusion of people excluded from the labour market" to "recognise the individuals' basic right to resources and social

*Dario Fo has already joined us!*

Appeal

About the campaign

Know more

Get involved

Contact us

About EAPN

Campaign on Facebook



## The need for private funds

In order to work towards its vision of a social EU and focus on its 3 priorities, EAPN needs to build more capacity, thus strengthening its recognition among the **key civil society actors fighting poverty and inequalities at National and European levels.**

Given the current financial difficulties affecting our economies, the subsidies granted to the EAPN members at the National level (by local governments) are at risk, which reinforces EAPN's role as a support to those local organizations.

➡ Therefore, given the importance of the battle for the survival of a social Europe, it becomes urgent for EAPN to complement its own public funding with funds from other sources that will **ensure its existence and that of its national networks on a long-term basis**



# The need for private funds

EAPN needs  
to raise:

€2 millions of private funds annually in 5 years

These private funds will be coming from 3 different sources :

Fundraising events : 20%

Middle and small donors : 15%

Major donors : 65%

EAPN has just launched an **endowment Fund** (investment fund), a fundraising structure that will enable EAPN to receive these private donations and that will ensure some support for EAPN's activities throughout the EU countries. This Fund also provides a unique entity dedicated to the donors who desire to get involved.





## The need for private funds

1. Building the capacity at National and EU levels

€1.5 Million per year in 5 years

2. Building and sharing knowledge about what works

€350,000 per year in 5 years

3. Empowering people living in poverty and bringing unknown practices to light.

€150,000 per year in 5 years

TOTAL:

€2 millions of private funds annually in 5 years



## **IV. BE PART OF IT**



## Donate to the EAPN Fund and build the social Europe with us

Just like EAPN aims at the participation and empowerment of people experiencing poverty and social exclusion, we enhance the engagement of all parts of civil society in the fight against poverty.

With your help in assuring our financial independence, **together we can have a major impact and help shape a more equal society.** We need your investment and your engagement to help Europe face its current challenges and choose a more social and sustainable approach.

Together, we can build new perspectives to eradicate poverty in Europe and ensure a better life for all.



# Get involved and become one major stepping-stone of EAPN's new perspectives

Become one of the 45 EAPN Fund members who, each year, will help EAPN grow its network, its capacity, and its influence.

Annual Gift Range	No. Gifts required every year	Subtotal	Cumulative total (per year)	Cumulative percentage
130 000,00€	1	130 000,00€	130 000,00€	10%
100 000,00€	2	200 000,00€	330 000,00€	25%
75 000,00€	3	225 000,00€	555 000,00€	
50 000,00€	5	250 000,00€	805 000,00€	
25 000,00€	7	175 000,00€	980 000,00€	75%
15 000,00€	10	150 000,00€	1 130 000,00€	
10 000,00€	17	170 000,00€	1 300 000,00€	100%
Totals	45		1 300 000,00€	100%



## Become a Champion for social Europe

- Be part of a dynamic network of experts and personalities engaged in the fight for a social Europe without poverty:
  - Share EAPN's values and raise awareness on EAPN's commitment to social justice and equality.
  - Contribute to EAPN thinking and analysis.
  - Be a member of the jury who will vote for the EAPN prize and become an ambassador of the fight against poverty.
- As an EAPN Fund member, get access to:
  - Tailored trainings for your company.
  - EAPN publications and public events (as seminars, working groups, annual meeting...)
  - EAPN visibility through our website, our publications, the awareness campaign and events...



## Contact

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RÉSEAU EUROPÉEN DES ASSOCIATIONS  
DE LUTTE CONTRE LA PAUVRETÉ ET L' EXCLUSION SOCIALE

## 4. The next steps



## Testing and validation of this “case for support”

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In order to launch the campaign to « fund the Fund », EAPN needs to first validate its proposal through interviews with potential major donors.

It is absolutely necessary to **meet those potential donors** in order to show your commitment to the project, and to understand their reactions as precisely as possible. Concretely, for this phase 1, we recommend that **EAPN and its members build a list of 40 prospects in order to eventually run 10 interviews.**

The objectives of these interviews are :

- To validate the interest of Major Donors in EAPN's Fund
- To validate the financial objective of the campaign to be launched
- To identify potential donors but also potential members of a “campaign committee”
- To identify the networks (individuals or foundations) that could be mobilized for the campaign



## 5. The actions we need from you today



# Identifying and qualifying the best prospects

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**WE NEED **YOUR INPUTS** TO BUILD A LIST OF 40 PRIORITY PROSPECTS IN EUROPE**  
(in order to eventually be able to meet with 10 of them)

**2 types of targets should be identified asap and approached for this “test phase” (Jan-Mar):**

- a. **Individuals (main target)****
- b. **Foundations (esp. corporate “grant-making” foundations)****

6. A few tips for this « prospect research »



# EAPN's Major Donors:

## Types of profile

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- Optimus has selected different types of profiles for EAPN's potential donors (based on their philanthropic actions and vision):
  - Individuals
  - Foundations (esp. corporate foundations).
- 2 key factors of success for this test-phase (solicitation):
  - Potential donors should have a direct or indirect link with EAPN or EAPN's cause,
  - Potential donors should be known for their commitment to social / anti-poverty or European issues.
- The 3 following examples of profiles will help you get a better idea of the prospects you should look for:
  - Personal and professional connections of EAPN's members,
  - People you have met through social or philanthropic events.

# Profile 1 : “Venture philanthropist”

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- Successful businessman/woman (esp. in finance and high technology business) who applies his/her managerial concepts and techniques to achieving philanthropic goals.

## Characteristics:

- Willingness to experiment : attracted by innovative projects that offer new solutions.
  - Focus on measurable results: need of regular and concrete feedbacks.
  - Focus on capacity building, instead of programs or general operating expenses.
  - High involvement (financial, intellectual and human capital)
  - Funding on a multi-year basis - typically a minimum of 3 years.
  - Often own his/her grant-making foundation or a social responsible investment funds.
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## Example : Maurice Tchénio

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- Graduate of HEC business school and the Harvard Business School (graduated as a Baker Scholar with high distinction).
- In 1972, along with Ronald Cohen and Alan Patricof, he founded Apax Partners which has become one of the world's leading private equity investment groups.
- From 1972 to 2010, he was chairman and CEO of Apax Partners in France.
- In 1995, he created the listed private equity company Altamir Amboise.
- Philanthropic Commitment:
  - In 2010, he founded the state-approved venture philanthropy foundation **AlphaOmega**: it aims at accelerating the development of associations or social businesses and at giving back financial autonomy to the disadvantaged, through education and access to employment.

## Profile 2 : “traditional philanthropist”

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- An “heir” of industrial or business family fortune who donates according to personal beliefs and peer pressure, as well as recognition (traditional philanthropy is a civic engagement tool which connects the individual's life-long “moral compass” with his/her wealth and social standing).

### Characteristics:

- Willingness to remain anonymous and discrete about his/her giving.
- Fear of exposure to public scrutiny.
- Altruistic giving: he/she does not ask for specific return or results.
- Often religious background
- Focus on concrete programs or missions (need to direct link between donations and ultimate actions of the organisations).
- Often emotion-driven giving.
- Strong interest in causes being supported (donate to one or two main causes).
- Personal relationship with the organisations that he/she supports

# Example: André et Bernadette Leclercq

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André and Bernadette Leclercq are part of the Mulliez family, one of the wealthiest in France at the head of an industrial and commercial empire (Auchan Group, Saint Maclou, Norauto, Decathlon, Kiabi, etc.).

Although they have created their foundation, AnBer, they remains very discrete about their donations:

- the foundation has no website,
- mentions of their support can only be found in publications of the supported organisations.

AnBer Foundation is state-approved and has supported 475 projects in 50 countries in six years.

Their philanthropic commitment is linked with their Christian beliefs and moral imperative (they consider that improving social environment is their responsibility, due to their social position).



# Profile 3 :

## Corporate (grant-making) foundation

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- Grant-making foundation, esp. corporate ones, are devoted to one or several philanthropic causes and make grants to Non-Profit organisations according to specific criteria.

### Characteristics:

- Focus on measurable results: need for regular reports.
- Funding on a multi-year basis - typically a minimum of 3 years.
- Specific range of actions (countries or regions where the company is located).
- Focus on benefits they can get in return :
  - increase their profile in the local community,
  - boost their corporate social responsibility (CSR) credentials,
  - increase staff morale and retention through volunteering.



## Example: Robert Bosch Foundation

- The “Robert Bosch Stiftung” is one of the major German foundations associated with a private company (since 40 years+). The foundation exclusively serves charitable purposes. As a shareholder of Robert Bosch GmbH (92% shares), the foundation receives a proportion of the distributed dividends in the company.
- The foundation promotes external projects and initiates its own projects in 6 areas: Health, Society Education, Science, International Relations and Culture.
- Eg. one focus in the area Society is called “Demography, Integration issue and Europe”, in which the Robert Bosch Foundation supports the “European Citizens’ Consultations”, **the first pan-European debate involving citizens from all 27 Member States to debate the future of the European Union across the boundaries of geography and language.**
- Some 100 employees manage an average of 800 internal and external projects a year. Approximately **€63 million was spent on program work in 2010**. In total the Robert Bosch Stiftung has provided grants worth €1 billion since its founding.

# THANK YOU !

**OPTIMUS Agency**

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