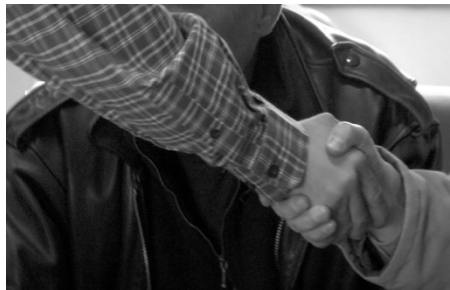




EUROPEAN ANTI POVERTY NETWORK

Optimus for European Anti-Poverty Network



Final report of the mission led by Optimus
regarding EAPN Europe fundraising strategy

October 3rd, 2012

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Part I.

Reminder of the general objectives of
Optimus mission

The different steps in a Major Donor strategy

Phase 1 – Preparation, definition and validation (approx. 6 months)

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

- Identify the restraints and the positives for the EAPN Fund approach towards major donors
- Measure the potential of fundraising from these targets (on a multi-country basis)

If the conclusions of Phase 1 are positive, Phases 2 and 3 can be proceeded:

Phase 2 – Launching the « EAPN Fund Club » (approx. 18 to 24 months)

Organisation : recruiting potential fundraising leaders, creating the right communication tools, organising the proper fundraising events (the Prize is the right « image vehicle »), ...

Sollicitation : who/when/where/how, what offers, what counterparts... for each identified target

Phase 3 – Build on the long-term (approx. 12 to 18 months)

Stewardship approach through very personal relationship (anniversary of gift, special information, etc)

Internal training, for the organisation to own the process on the long-term

Objectives of Optimus mission

- **The mission led by Optimus was to complete Phase 1 of a Major Donor strategy.**
- **Periods of the mission : period 1: October 2011 - December 2011**
period 2: March 2012 - September 2012

4 objectives:

1. Building the « case for support » for the EAPN Fund in order to engage and mobilize potential major donors.
 - The EAPN Fund, formally launched in 2011 and managed by the King Baudouin Foundation, benefited from an initial funding of €50000, coming from the EAPN network, charity members and local ministries.
2. Involve the stakeholders of the EAPN Fund in the campaign.
3. Identifying and qualifying the best prospects in order to recruit the first members of the Steering/Campaign Committee.
4. Testing and validation of the case for support in order to evaluate the financial goal of the EAPN Fund campaign.

Part II.

Actions completed by Optimus

Actions completed by Optimus

1. Benchmarked EAPN Fund with organisations involved in the same cause.
2. Built the « case for support » for EAPN Fund.
3. Identified and qualified a selection of prospects.
4. Tested the case for support with selected prospects.

1. Benchmark of EAPN Fund

Optimus analysed the positioning and the fundraising strategies of 4 European organisations that launched similar vehicles to mobilize major donors on a European basis or that are involved in the same cause with multi-country campaign.

Objective of the benchmark: identify *best practices* in fundraising, especially toward major donors.

The following 4 organisations have been benchmarked:



European Network
Against Racism



Think tank dedicated to
European unity







The biggest network of
Catholic charities in the world
devoted to reducing poverty
and campaigning for social
justice



European
Cultural
Foundation

1. Benchmark of EAPN Fund

Summary table of the analysis

	Funder/ Funding event	Subject	Actions	Separate vehicle to collect funds	Online Donations	Awards
	1997 European Year Against Racism	Racism-free Europe	Lobbying Research Information	YES	YES	YES
	Jacques Delors 1996	Think tank for an united Europe	Lobbying Research Information	NO	Form available in French	NO
	Lorenz Werthmann	reducing poverty and campaigning for social justice	Direct actions and lobbying	YES (in France)	YES	YES (In France)
	Denis de Rougemont, Robert Schuman, Prince Bernhard of the Netherlands	Promoting cultural cooperation in Europe	Grants and lobbying	NO	Link to http:// www.givingine urope.org	YES

i.e. detailed results of the benchmark analysis in the document sent in August 2011.

2. Case for support of EAPN Fund

- From the existing positioning of the EAPN Fund, Optimus built a specific case for support, the tool to mobilize the future major donors in which the main projects of EAPN are highlighted.

- This document (29 pages Powerpoint document) has been used during the interviews Optimus led with potential donors.

Several versions have been worked and submitted to EAPN, the last version of the case is dated April 2012.

- The following EAPN stakeholders have been interviewed in order to collect information needed to build the case for support:

- ✓ Mr Ludo Horemans - President of EAPN Europe
- ✓ Mr Carlos Susias - President of EAPN Spain
- ✓ Mr Olivier Marguery – President of EAPN France

Written reports of each interview has been sent to EAPN.



2. Case for support of EAPN Fund

Key contents

Focus on 3 priorities to create a more social and sustainable Europe:

1. Building the capacity at National and EU levels **1.5 million € / year in 5 years**
 - ✓ Objective: 1 staff person per country
2. Building and sharing knowledge about what works **350.000 € / year in 5 years**
 - ✓ Learning from practices outside Europe.
 - ✓ Effective lobbying on the EU decision makers at both National and EU levels.
Example: *Biennial Prize for Innovation from Transnational Learning in the Fight against Poverty and Social Exclusion in Europe.*
3. Empowering people living in poverty and bringing unknown practices to light **150.000 € / year in 5 years**
 - ✓ Studies/publications
 - ✓ Creating online training and capacity platform
 - ✓ Develop a public campaign

2 millions € of private funds annually in 5 years

3. Identification and qualification of prospects

- 3 types of targets have been identified:
 - ✓ Individuals / Foundations / Companies
- In 5 countries:
 - ✓ France / UK / Norway / Portugal / Cyprus
- Sources of prospects identified:
 - ✓ 17 prospects suggested by few EAPN members: Dag Westerheim (Norway), Julio Paiva (Portugal), Peter Kelly (UK) and Olivier Marguery (France). The other EAPN members have not sent any suggestions.
 - ✓ 10 international foundations identified by Optimus.



A list of 27 prospects: 3 individuals, 16 foundations, 8 companies.
Below the objective which was to select 40 prospects.

i.e. Attached the detailed Excel file which gathers information on all the prospects and the contact history of EAPN with them.

4. Test of the case for support

- In order to evaluate the interest of major donors regarding the EAPN Fund, the objective was to interview 10 prospects.
- Optimus sent introduction email model to EAPN Europe and to selected EAPN members so that they can introduce Optimus in order to schedule an interview.
Olivier Marguery made some introduction but the others did not go ahead mainly because of a lack of connection with the prospects they suggested.
- Therefore, the following prospects have been approached:
 - By Optimus: Fondation Oxyane (Decathlon) - Stanislas Ernoult director (France) -> negative answer
 - By Optimus : Association Georges Hourdin (France) -> negative answer
 - By Optimus: Jérôme Vignon (France) = good contact for his expertise but not a fundraising prospect
 - By Peter Kelly (UK): negative answers from Carnegie Trust UK and Joseph Rowntree Charitable Trust not interested in funding a European organisation.
 - **By Fintan Farrel: Edward Hoare (UK) -> ongoing contact**
 - **By Optimus: United Way Tocqueville (UWT) (France) -> a meeting between EAPN and Delphine Grenon from UWT is currently being scheduled in the following weeks.**

Reporting emails have been sent by Optimus after each interview or contact they had.

Part III.

Main conclusions of Phase 1 and
recommendations

Main conclusions

1. Why were the interviewed prospects not interested in EAPN fundraising initiative?

Reasons they gave:

- ✓ Lack of field operations and concrete projects (Association Georges Hourdin, Fondation Oxylane).
- ✓ Donors do not fund operating costs such as the recruitment of a staff person = 75% of the financial needs of EAPN (Association Georges Hourdin, Fondation Oxylane).
- ✓ In line with the general mission of EAPN but the projects of EAPN did not fit within the actions of the organisation (Fondation Oxylane).
- ✓ Not interested in funding a European organisation (Carnegie Trust UK, Joseph Rowntree Charitable Trust).

2. Difficulty to identify and approach prospects, and therefore to appropriately test the case for support

- ✓ Because of a lack of connections or involvement from most EAPN members which could lead to the prospects.

Main conclusions

General observation on major donor's strategy for EAPN:

- a) Most potential donors are focused on local (national) issues and field operations rather than European and political issues.
- b) EAPN's mission is closer to large public institutions like the International Development Association (World Bank)
- c) EAPN does not have a natural network of business partners who can be easily attracted by its actions and its notoriety or be contacted by its members.
- d) EAPN's members are not easily mobilized by its Fundraising Issue.

Main recommendations

This observation leads to recommend two differentiated approaches in EAPN's fundraising strategy:

1. First: EAPN should build a network of business partners in order to start a relationship.

This may be possible to start by a sponsorship policy for its large European events.

2. Second: EAPN should develop partnership with large Global Foundations (IDA, United Way...) who may be able to help in achieving some common goals.

Main recommendations

Concrete actions that EAPN could implement :

1. Case for support: focus on the most attractive projects for potential donors

- ✓ Precise, measurable and concrete projects : priority #2 and #3.
 - ✓ *i.e. Publications that EAPN wants to develop: Child poverty, Quality of work.*
 - ✓ *Development of a public campaign with several ideas for its theme.*
 - ✓ *Biennial Prize for Innovation from Transnational Learning in the Fight against Poverty and Social Exclusion in Europe.*
- ✓ Give concrete examples of projects that have already been accomplished by EAPN (publications, public campaigns)
- ✓ Evaluate precisely the cost for one publication in X languages.
- ✓ Do not ask them to cover operating costs, such as Priority #1 - one staff person per country.

Main recommendations

2. Other projects to be presented to donors: events

Optimus recommends to look for *sponsors for the several events* they organise each year.

- ✓ i.e. The event “Row4Rights » for human rights which aimed this year at collecting funds for 2 organisations, EAPN and Food Banks: a very attractive project to sponsor for companies such as Choice Hotels in Norway etc.

3. Approach current partners for gifts

- ✓ GDF Suez which has been in contact with EAPN for a specific project on « Energy poverty » on a work basis, would be approached for a sponsorship operation of an event or a publication.

4. Partnership development with International Foundations in Europe

- ✓ International Development Association (IDA)
- ✓ United Way