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Major Donors – The Personal View

Chris Carnie
Martine Godefroid
Henk J.Th. van Stokkom
Bernard Vergnes

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Objectives

- Understand philanthropy from a personal point of view
- How to best approach major donors
- How to best service/work with major donors

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Your Team

- Chris Carnie
– Research Consultant
- Martine Godefroid
– Consultant
- Henk J.Th. van Stokkom
– Philanthropic advisor
- Bernard Vergnes
– Businessman and philanthropist

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Tuesday

- The European major gift scene
- Interview - Henk J.Th. van Stokkom
- Key Themes – open discussion

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Wednesday

- Interview – Bernard Vergnes
- Key Themes – open discussion
- Presentations and pitches

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The European Major Gift Scene

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Wealth in Europe

- 2,9m people with more than US\$1m in non-property assets
- Combined wealth;
 - Euros 7.068.000.000.000
 - 27% of global HNWI wealth
 - Up 7.8% 2005-6

Source; 2007 World Wealth Report, Cap Gemini Merrill Lynch

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Where are the Assets?

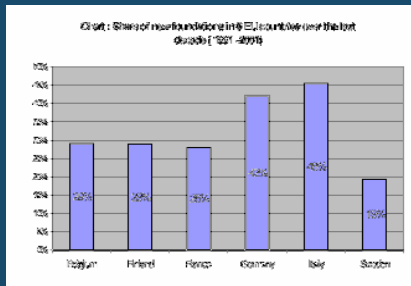
- Europe 27%
- North America 30%
- Asia-Pacific 23%
- Latin America 14%
- Middle East 4%
- Africa 2%

Source; 2007 World Wealth Report, Cap Gemini Merrill Lynch

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Philanthropy in Europe



Source: EFC Research Task Force 2004

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Major Gifts are happening Our Survey in the Netherlands

- NPOs report
 - €2.2m largest gift from a living donor
 - One fourth report largest gifts > €1m
 - Half report largest gifts > €100,000
- (Living) donors report
 - €800,000 - €250,000
 - €50,000 typical

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Who is doing What Our Survey in the Netherlands

- Most are interested
- Few have proactive approach

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Key Barriers

Our Survey in the Netherlands

- How?
- Board
- Investing in People
- Information
- Mismatch between Donor and NPO concerns
- Do It Yourself Philanthropy

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An emerging market

- Growing number of NPOs starting a MD programme
- First capital campaigns in Continental Europe

Major donor servicing will change

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Venture Philanthropy

- High engagement
- Multi-year support
- Tailored financing
- Organisational capacity building
- Non-financial support
- Performance measurement

European Venture Philanthropy Association (2006)

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IMPETUS TRUST delivering a step change with charities: inspiration • strategy • impact

about donors charities associates news links

you are in: About

Impetus Trust is pioneering venture philanthropy (VP) in the UK. Impetus offers donors the means to make the biggest difference with their money by enabling charities to achieve a step change in their performance.

Impetus helps to fill an important gap in funding by focusing entirely on an integrated investment package comprising:

- long term financing of charities' infrastructure, hands on management support, capacity building delivered through projects run by volunteer associates

The need for a step change arises in three main situations: rapid growth, turnaround and merger. As well as the impetus to charities, there is an impetus to new donors and to new people joining the sector from the business world.

For more information, select a link:

- Background
- Our Team
- Strategic Framework
- Career Opportunities
- Contact Us

Capacity Building Long term Funding Hands on Management Support

www.impetus.org.uk

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SOVEC Social Venture Capital a better world is our bottom line

Home SME's Venture Capital Entrepreneurs Ghana Investment Policy Local Partner Team Support Contact

"A better world is our bottom line"

SOVEC is an investment fund set up by Dutch entrepreneurs, to invest in small and medium sized companies (SME's) in Africa.

SOVEC believes that economic development is fundamental for alleviating poverty and creating social sustainability. SOVEC therefore supports local entrepreneurs, by investing capital and committing its network of Dutch entrepreneurs who are prepared to invest their time, energy, expertise and business contacts.

SOVEC's main goal is to alleviate poverty in developing countries. We do this by providing Venture Capital to entrepreneurs in Africa, who can herewith build their businesses, create job opportunities, provide income and really emancipate people.

In other words, we aim to reach our social goal through a business approach aiming for a normal financial return.

www.sovec.nl

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Henk J.Th. van Stokkom

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The Big Issues

- Identifying
- Recruiting
- Concerns and Objections
- Asking
- Servicing
- The Future

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Identify HNWI

- Who are the wealthy?
- Where are they?
- Family offices and structures for wealth

Key Theme - The people

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Recruit HNWI

- How to create the relationship?
- What do they want to hear?
- How do we sell to HNWI?

Key Theme - The role of the intermediary

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Concerns and Objections

- Giving criteria
- Involvement
- Core costs
- Creating their own foundation or project

Key Theme - Stewardship

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Asking

- Being asked – the user's experience
- Nearly asking – “your advice...”
- Who should ask?

Key Theme – Critical points in asking

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Servicing HNWI

- Servicing Matrix
- Coping with service

Key Theme - Service levels

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The Future

- The Strategic Funder
- Nonprofits sans Frontières
- Outputs and Impacts

Key Theme – Trends, the future

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Identify HNWIs

- Who are the wealthy?
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Recruit HNWIs

- How to create the relationship?
- What do they want to hear?
- How do we sell to HNWIs?

Key Theme – Starting the relationship

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Concerns and Objections

- Giving criteria
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Key Theme - Stewardship

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Your case...

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The Big Issues

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Thank You!

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