

CITY A.M. ●

# GIVING

*Charity & philanthropy today*

DECEMBER 2014



COVER STORY

## THE DIGITAL REVOLUTION

Changing the world one  
bucket at a time

## CHARITY BEGINS AT WORK

How the financial world  
leads by example

## PHILANTHROPY IS LIKE SEX...

Every generation thinks  
they invented it

PLUS

## THE WORLD CHARITY INDEX

featuring the  
top 20 global private  
sector charity donors



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2010 PARALYSED FROM THE CHEST DOWN IN AFGHANISTAN  
2014 WALKED DOWN THE AISLE WITH HIS CHILDHOOD SWEETHEART

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# Welcome to City A.M Giving

We regularly bring you stories about individuals in this amazing City who do extraordinary things to raise funds to help others



I

would like to introduce you to our Christmas Charity Index, which for the first time this year is contained within a special edition charity magazine, City A.M. Giving.

This magazine, at the time of year that is associated with giving, is focused on the selfless charity work that so many of our readers partake in to help make the world a better place.

At a time when governments around the world are so budget constrained, the work of the charitable sector becomes more important than ever.

The cornerstone of this magazine is our Charity Index, which ranks the world's private sector charitable institutions in terms of how much they have distributed during the year. This is the fourth time we have compiled such an index and each year it gains prominence and credibility.

For the second year in a row, it has been compiled by Prof dr Theo Schuyt, an academic and expert in the field. Prof dr Schuyt, from the VU University Amsterdam and University of Maastricht, is chair of the European Research Network on Philanthropy (ERNOP).

The institutions on this list, each and every one of them, excel by distributing funds to projects and organisations who enrich the lives of others and help the disadvantaged to help themselves. They have every reason to be proud of their inclusion in our index and we hope this inspires others to make their way into our league table in the future.

Elsewhere in the magazine, we have articles by Dan Corry, chief executive at NPC (New Philanthropy Capital), about companies and creating social value, and by Cheryl Chapman, director of City philanthropy, about giving in the City.

We also bring you, as we do almost every day in our newspaper, stories about individuals in this amazing city of ours who do extraordinary things to raise funds to help others.

I hope you enjoy reading this. And I wish you and your families all the very best for the festive period.



David Hellier  
Editor, City A.M.



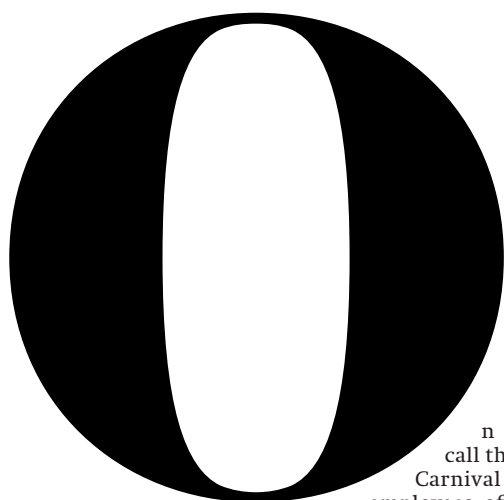
***When governments are so budget constrained, the work of the charitable sector becomes more important than ever.***

# Giving: the City's secret hobby

With hundreds of millions given away each year, the financial services industry is one of the most charitable around







On the day they call the Notting Hill Carnival of the City, employees of leading brokerage firm ICAP come into work in fancy dress for an afternoon of trading, with all revenues raised going to charity. It's great PR for ICAP, great for the charities (who this year received £8m) and great fun for all involved, including the many A-listers who also turn up to man the phones. This year, Cheryl Fernandez-Versini, Prince Harry, Gemma Arterton, Damian Lewis and many more took time out of their busy schedules to take to the floor, buying and selling, all in aid of their favourite charities.

The ICAP Charity Day couldn't be further removed from the caricature of the pin-striped City worker playing fast and loose with other people's money. The reality is that through Corporate Social Responsibility schemes and individuals' charitable activities, financial services is one of most giving sectors there is.

It's hard to measure the full extent of altruism in the City as data is scarce and tends to ignore the huge quantities raised by individuals. Still, in the research that has been carried out, the message is clear: the City is giving, and it's giving a lot. A City of London Corporation survey into "the impact of City business in addressing social disadvantage" found that firms made £519m of community investments in UK-based projects in 2009. This includes everything from funding for arts institutions to helping domestic abuse charities. Heart of the City, an organisation set up to share best practice among companies interested in CSR, lists many examples of big business making a big difference. There's Aberdeen Asset Management, who collaborated with youth charity Envision in 2012 to launch development programmes in two Tower Hamlets schools (as well as providing funding, volunteers from AAM helped implement the scheme) and law firm Reed Smith, which set up the Create/U-turn project, giving vulnerable, socially excluded women the chance to explore their creativity in workshops with professional artists and volunteer employees from the firm.

These are just two examples of the kinds of projects un-



**Clockwise from top: Prince Harry, Gemma Arterton and Cheryl Fernandez-Versini buying and selling on the ICAP Charity Day**

dertaken by City firms all the time. Heart of the City chief executive Carolyn Housman says the public tends not to know about CSR work because "businesses don't necessarily think it's something they should be communicating." Why not? "It's a sensitive issue. Society is divided about whether or not companies exist to return money to their shareholders or whether there's a larger purpose. There's also the question of whether or not the amount of money is the right amount of money. Someone may think a large bank should give half of its profits to the community, or they might prefer you to improve your customer service... so you see it's a very sensitive topic."

The big banks tend to be a more sophisticated in their approach to communicating CSR, but even then, media coverage is rare because, according to Housman, newspapers "don't report on good news stories". There's also the fact that many CSR schemes have been going for years, and simply aren't news anymore. Housman cites the fate of the 1 Percent Club as evidence for the lack of awareness of CSR. "The idea was that big companies should be giving at least one per cent of pretax profits to charitable organisations. It was done away with because it was found that a lot of businesses were doing it already."

So businesses seem to be doing their bit. But what of the individuals who make up those businesses? As the case studies in this supplement show, the City is full of committed people willing to put their bodies on the line for charitable causes. Patron Capital boss Keith Breslauer, who joined several serving and non-serving Royal Marines in a thirty hour, cross-channel kayaking mission that raised over £250,000 for disabled ex-servicemen and women, is a striking example of the kind of charitable acts regularly undertaken by financial services professionals.

Getting people to sponsor your charitable endeavours is one thing, giving up chunks of your own hard-earned cash is another. Many City figures, though, have established a reputation for giving generously. The likes of Arpad Busson and Stanley Fink are as well known for their philanthropy as they are for their careers in

**It's hard to measure the full extent of altruism in the City as data is scarce and tends to ignore individuals' personal charitable activities**



**Actor and  
model  
Holly  
Valance**

► finance. Winton Capital CEO David Harding recently gave an unprecedented £5m to the Science Museum. But when it comes to personal giving, there's room for improvement says Cheryl Chapman, head of philanthropy for the City of London Corporation. Chapman points to the US as an example of a place with a strong philanthropic tradition. "It's as much to do with their history as their culture. They've not had a welfare state. They've always relied on themselves to provide. It's so embedded in their culture. Most high school alumni will give back to the organisation in later life, it's what they do, and that's the point we'd like to get to."

We're getting there, she says: "We've seen things grow. New giving networks have started up. The networks that already existed are growing. There's Beyond Me, an interesting new giving network for young people, which has doubled in size. It now involves 450 young people and gives about half a million and more in pro-bono work. We can see change but we're just at the start. Culture change is a long term thing but we're starting to gather numbers and increase scale."

In order to enact this culture change, Chapman is targeting younger people just setting out in careers in the financial services. "When people arrive in the City, their heads are down for about 18 months doing graduate programmes. Then when they come up for air, it's about reminding them that philanthropy is an option and getting them early. Because you never meet an ex-philanthropist, ever. It's addictive."

With endless screens flickering with numbers and charts, the ICAP trading floor is the very picture of financial modernity, but charity in the City is far from a

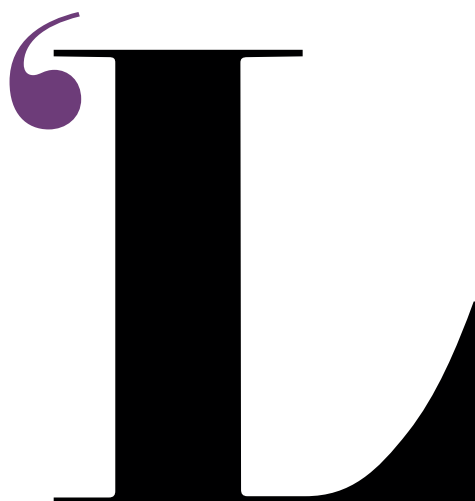


**Homeland  
actor  
Damian  
Lewis  
doing his bit  
at the ICAP  
Charity Day**

modern phenomenon. It goes back as far as the days of Dick Whittington, who after his death in 1423 left a sum of £6,000 (many millions in today's money) to a number of almshouses around London (the trust remains today). The City of London's hundred or so livery companies have proud philanthropic traditions that have seen them give generously to schools, hospitals, museums and libraries over the years. In 2010 the livery companies gave over £40m to charity, showing that the culture of giving in the City is as strong as it ever was. Here's to the next 800 years.

# Welcome to the Dragon's Den of charity

This philanthropic gameshow comes with a serious message for the thousands of people it helps



inda 100", "Michael 200", "Fred 500", the shouts echo across the room as more and more people put their hands in the air. As the cries die down, the pledge leader urges them on: "Was that another hand at the back?", "Wouldn't you like to even out that number?"

A woman in the corner dutifully logs each amount and a bar chart on the screen moves slowly upwards indicating the amount donated.

This is crowd funding charity style. I'm in the heart of the City in the glass tower of Macquarie Bank's European headquarters, which has provided the space for The Funding Network's (TFN) festive funding event.

Dubbed a "Dragon's Den" for charities, TFN events mimic the style of the TV show with four charities given six minutes each to make a pitch for how much money they need and what they intend to use it for. After each pitch the audience has six minutes to ask questions. Once all the pitches are complete, the charities leave the room and the pledging session begins one charity at a time with people shouting out their names and the amount they want to give.

This is TFN's last session of the year in London and like most Christmas knees-up, the booze is flowing, there are plenty of canapés and the mood is jovial. But there's a serious backdrop.

We hear about primary school children from





deprived backgrounds down the road in Islington who start school barely able to communicate; South African girls more likely to be raped than finish their schooling; traumatic lives where substance abuse has become the only healer and young offenders who end up back in prison within two years of their release.

To pull at the heart strings even further, some of the charities bring human props. Nine-year old Emily tells us how the philosophy for children course provided by charity SAPERE means “you can express yourself”. And Sharon explains how a 12 week course from the Foundation for Change charity meant that at 51 she was able to move from life-long addiction to employment and “becoming a decent parent”.

Sitting here, sipping wine in the smart surroundings of the bank, it's impossible not to feel ridiculously spoiled and wealthy in comparison.

And that is TFN's point that you don't have to be mega-rich in the style of Bill Gates to give, that even on a normal salary you can afford to make a difference.

For most of the people at this session this, plus the fact they know exactly what their money will be spent on, is the attraction.

Most of the donations are at least £100, but there are some £50s and TFN also holds youth events where giving starts at £10.

It may seem a very public way to show your support,

**Members of the Streetwise Opera, a charity that helps people get back on their feet through music**

*I feel powerless in so many areas of what's going on in the world, but I come here and I know I can make a difference*

but London art dealer Fred Mulder, who founded TFN, says it's effective because its members feel responsible.

“By inviting organisations to come and present to us, by raising the questions we think are important, we also take responsibility for the outcome of our meetings, and I think this makes us more generous,” he says.

The numbers suggest he's right. On the night the group raised £45,267, excluding giftaid, taking the total raised by the 205 auction style events since TFN's 2002 inception to over £7m.

TFN member Sanjay Joshi, a strategy consultant in London, admits that while he came with a budget in mind, he often spends over that.

“My day job has some relevance to people's lives but it's not where real social change is happening, that's here. Without this sort of structure there is no impetus to give away £100,” he says.

The evening ends with a performance from Streetwise Opera, a charity that uses music to help homeless people make positive changes in their lives, which received help from TFN in 2006. As their members force us to stand up, hold hands and join in, it's a raucous feel good finish to an emotional evening.

“I feel powerless in so many areas of what's going on in the world, but I come here and I know I can make a difference,” says TFN chair Michael Maynard.

# Lord Mayor's charity plans

New Lord Mayor of the City of London Alan Yarrow has set his sights on raising funds for Mencap and Scope – two charities close to his heart



I am honoured to be The Lord Mayor of the City of London. Amongst a raft of business and civic duties, my wife Gilly and I are committed to my Lord Mayor's Appeal, which is supporting Mencap and Scope, as well as three UK Arts organizations. The cause is a personal one. We know, from experience, the importance of support for families and carers of people with a learning disability or physical impairment. Mencap and Scope make an immense contribution to family wellbeing, which is critical to the development of a disabled child. These charities have been so important to us, and we want to help others to access the same help and opportunities.

Our eldest son Max was born in 1981. Following a difficult birth, it became apparent that he was not developing at the right phases and had a learning disability. Gilly gave up her job as a teacher in order to support Max's personal development – a path made all the smoother by support from Mencap and Scope.

Like any couple whose son or daughter is born with a learning disability or physical impairment, Gilly and I found our lives taken in an unexpected and often challenging direction. We were so fortunate that Scope and Mencap were there for Max – and for us as a family. This Appeal is our way of supporting others in return. All families in a similar situation want the same thing. We want to ensure our children have everything they need to fulfil their potential. Charities like Mencap and Scope work hard to make the world a place where disabled people can participate fully. They are lifelines for people with a learning or physical disability, and for their families.

As a vice president of Mencap, and a beneficiary of its services, I am more familiar than most with the facts. Every 10 minutes, a family learns that their child is disabled. Why do these families so often feel marginalised

**Alan Yarrow, the 687th Lord Mayor of the City of London and his wife Gilly**



***The theme for my Mayoralty is: 'Creating Wealth, Giving Time and Supporting People'***

when their experience is so mainstream? It's in all our interests to understand additional needs, and support those living with them. We are all part of society so we should support every part of it.

The theme for my Mayoralty is: "Creating Wealth, Giving Time and Supporting People". Six, simple words which reflect the timeless role and responsibility of the City of London: creating and investing in rich pools of both human and financial capital; providing a wealth of time and resource; encouraging talent and opportunity.

My Appeal will raise funds and awareness for its selected charities through a packed programme of exciting events. From gala dinners in the Guildhall, to fashion shows at the Mansion House, to a golf day at Royal Wimbledon Golf Club. In addition to supporting two world-leading disability charities, part of the Appeal's proceeds will go to three organizations which are an important part of the UK's pre-eminence in Arts and creative industries: The Royal Ballet School, the City and Guilds of London Art School, and The Royal Academy of Arts. They also play a key role in supporting social mobility, building ambition and encouraging the pursuit of excellence.

We in the City of London are so proud of our uniquely rich and diverse talent pool. We want to invest in our communities for the future – and we want to support success for every part of our society.

## **LORD MAYOR'S APPEAL**

For many decades the annual Lord Mayor's Appeal of the City of London has raised millions of pounds for the charities. The Appeal's purpose is to be an illustration of the philanthropy the Square Mile has to offer. Each year highlights the inspirational and transformational ability of those involved.



## THE CHARITIES

The funds raised during this year's Appeal will enable Scope and Mencap to further develop two exciting flagship programmes. Scope will create the Scope Family Fund for parents of disabled children. Mencap will develop a helpline and advocacy service, able to provide essential support to families and carers.

### MENCAP

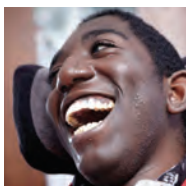
Mencap works to support the 1.4m people with a learning disability in the UK, and their families and carers by fighting to change laws, improve services and access to education, employment and leisure facilities. Mencap supports thousands of people with a learning disability to live their lives the way they want.

Richard Yorke, Director of Fundraising at Mencap, said:

"There are 1.4m people with a learning disability in the UK. There are almost a million family members caring for someone with a learning disability. We know that 8 out of 10 families that include someone with severe or profound learning disabilities talk about feeling isolated and exhausted.

"We need to increase our capacity to support people to fully understand their choices and empower them through helping them access information, advice and support to improve the quality of their lives. With the generous support of the Lord Mayor's Appeal, we can make a start."

Thomas Bachofner, whose young daughter Rosie has a learning disability, and participated on the float said: "Having a learning disability doesn't mean there can be no quality of life and people need to know it's not the end of the world. That is why having support is so important. My family joined in the Lord Mayor's parade to showcase to the families of people with a learning disability that there is support out there and raise awareness of how important it is to continue to fight for what we deserve."



**Thousands of people with learning disabilities have benefited from the Lord Mayor's charities**



### SCOPE

Scope exists to make this country a place where disabled people have the same opportunities as everyone else. They provide support, information and advice to more than a

quarter of a million disabled people and their families every year.

Scope supports families of disabled children in many ways:

- Through a nationwide Face 2 Face network, which connects parents with disabled children for emotional and practical support
- A free national helpline for disabled people and their families who are in need of information and support.
- An online community for people connected by disability that provides expert advice, tips and forums for parents and disabled people
- Sleep Solutions, a tailored service that helps support families of disabled children and those with additional needs, aged between two and 19, who have severe sleep problems. Support includes workshops, clinic appointments and home visits where appropriate, as well as vital telephone and email support

Alan Gosschalk, Director of Fundraising at Scope, said: "Life can be really tough for families with disabled children. They face many challenges and often find it hard to get the right support. Scope provides information, advice and support to more than a quarter of a million disabled people and their families every year.

"The Lord Mayor's Appeal will support the Scope Family Fund for parents of disabled children, enabling us to support as many families and disabled children as possible."

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## CITY A.M.

### How we help City A.M. has raised millions for good causes over the years

**C**ity A.M. is no stranger to philanthropy, and has achieved some impressive results through its charity appeals.

For its first appeal, launched in 2011, it chose Opportunity International, a charity which provides microfinance loans for thousands of enterprising Africans who want to start their own business. City A.M.'s initial ambitious target was £250,000, but ultimately it raised more than five times that with an incredible £1.5m in total.

After this fantastic performance, there was some trepidation as to whether a second appeal could be as successful. But its 2012 appeal for the same charity raised a staggering £4.4m thanks to the generosity of readers, supporters and sponsors, including matched funding from the UK government.

By July last year, the money raised had enabled the charity to invest in 19,574 micro-entrepreneurs, typically market traders, with



**The benefactor of one of our charity appeals**

an average loan size of just £233. This helped to create or sustain 29,361 jobs.

We've also helped to support plenty of the City's favourite charities including Movember – the month in which men around the world grow a moustache to raise awareness and funds for men's health. This year more than 89 teams signed up to take part in the City A.M. Finance Challenge.

The paper was also influential in securing the green light for a new £5m cancer care centre at St Bartholomew's Hospital. The centre had received some opposition from a group that believed the building would impede planned restoration to the Great Hall at St Bart's, an 18th century building which is part of the hospital. But backing from City A.M. together with support from City figures such as Sam Laidlaw of Centrica and HSBC's Stuart Gulliver saw it passed by the City of London Planning and Transportation Committee.









# The digital revolution

How technology is changing the face of the charitable sector, one bucket of ice at a time

By Steve Dinneen

**G**

o back in time a few months and you'll see millions of people, including hundreds of the world's richest, most powerful men and women, drenching themselves with buckets of ice. From Mark Zuckerberg to Bill Gates; Anna Wintour to Oprah Winfrey, it seemed everyone was getting in on the act, and the Ice Bucket Challenge became a global phenomenon. Cristiano Ronaldo did it in his pants. Charlie Sheen substituted ice for money. Patrick Stewart simply sipped a whisky and made a donation. All the while, the trend grew exponentially, spreading through social media like wildfire. Facebook reported more than 2.5m ice bucket videos uploaded to its servers, while Instagram had almost 4m.

The concept – pour icy water over your head, nominate others to do the same, donate to the associated charity – has been around for some time, doing the rounds in largely private social networking circles. It became associated with ALS (amyotrophic lateral sclerosis, the US name for Motor Neurone Disease) when US golfer Chris Kennedy was nominated to undergo the challenge. The relatively small charity saw a remarkable spike in donations, receiving almost \$100m in August this year, up

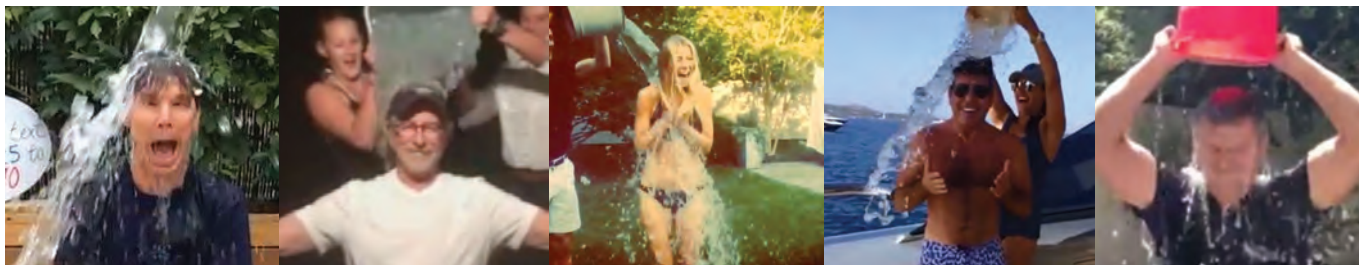
from \$2.7m the year before (The UK MND Association received £2.7m in the same period compared to last year's £200,000).

Other charities soon got in on the action – to the consternation of some, who accused them of hijacking ALS's gravy train – and charitable donations across the world saw a spike, the long-tail of which many organisations are still experiencing.

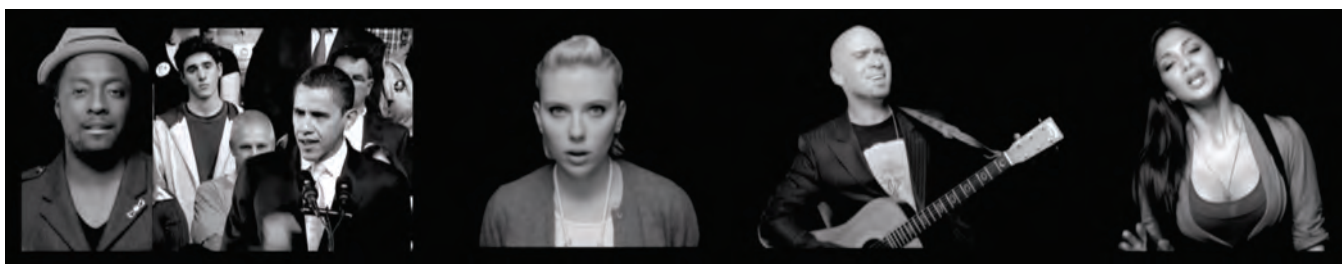
"The Ice Bucket Challenge was a huge benefit to us," says Chris James, director of external affairs at the Motor Neurone Disease Association. "It's a relatively rare condition, affecting only around 5,000 people in the UK, so it's tough to raise awareness. JustGiving's text donation platform helped a lot – it made donating so simple.

"Our challenge now is to keep that awareness going as long as possible. You can plan social media campaigns but it's incredibly difficult to predict success on this kind of scale. In a way, the ice bucket challenge was a one-off opportunity – there's the danger that once the memory of the challenge fades, so will the awareness, so our question is 'how do we keep that engagement going forward?'"

The ice bucket challenge wasn't the first such phenomenon. All the way back in April – an eon ago in internet time – the No Make-up Selfie was clogging up timelines and news-feeds. The premise was even simpler than the Ice Bucket Challenge: post of photo of yourself online ➤



**ICE BUCKETEERS** From left: Benedict Cumberbatch, Steven Spielberg, Gwyneth Paltrow, Simon Cowell, Matt Damon



**YES WE CAN SUPPORTERS** From left: Will.i.am, Barack Obama, Scarlett Johansson, Andre Agassi, Nicole Sherzinger



**NO MAKE-UP SELFIES** From left: Cameron Diaz, Adele, Gwyneth Paltrow, Cressida Bonas, Jemima Khan

wearing no make-up, nominate others, donate to Cancer Research UK (again, Cancer Research didn't create the trend). As stars including Gwyneth Paltrow and Holly Willoughby weighed in, the charity raised a staggering £8m in just six days.

Both are examples of a new, digital frontier for the charitable sector. It's not dissimilar to President Obama's 2008 election campaign, which also took advantage of social media and micro-donations. In Obama's case, he overcame a disadvantage in the number of donations by wealthy individuals by mobilising an army of working-class Americans who donated just a few dollars each. A third of Obama's war-chest came from donations under \$200 – a strategy that also saw the micro-donors become more politically engaged. Facebook and, to a far lesser extent, Twitter were key to Obama's strategy, with his famous Yes We Can slogan dominating social media for months before and after the election.

Technology's influence over the sector doesn't end there; just as digital firms are helping to spread the word and mobilise people, so they are providing the platform to donate, with no cause too great or too small. For every Ice Bucket Challenge or No Make-Up Selfie, there are a million friends and colleagues running 10k for charity, trekking Kilimanjaro, or growing a moustache for Movember. Almost all are accompanied by the plea: "Sponsor me on my JustGiving page".

More than 10m people now use JustGiving, with over \$3bn raised since its launch in 2001. "We've developed a highly personalised, social experience to help fundraisers reach more people and raise more money," says Anne-

**We've developed a highly personalised, social experience to help fundraisers reach more people and raise more money**

Anne-Marie Huby, co-founder and MD of JustGiving

Marie Huby, co-founder and MD of JustGiving. "Thousands of people are raising money on JustGiving every day – it's the world's social platform for giving."

JustGiving's 14 year's worth of data also allows them to fairly accurately pinpoint the charities its users are interested in, and feed them relevant giving opportunities, just as Facebook learns from its users' behaviour to tailor its content. This "socialisation" of giving is one of the key trends the sector is scrambling to fully understand, especially in the US, which tends to be several steps ahead of the rest of the world in technological terms.

The digitisation of the charity sector brings a host of other benefits for potential donors. Until recently, people were largely satisfied with a certificate proclaiming they are the adoptive parent of a dolphin – now they increasingly demand to know where exactly their money is going, and why.

A potentially sticky side effect for charities is that, while social media is a great way of attracting donors, these new-wave philanthropists tend to be flighty creatures; just as we're more prone to switch our electricity provider or current account, so we're prone to jumping from charity to charity – a 10k run for the WWF, a triathlon for Unicef. Of course, you can read this as a benefit, too: whether you're a giant of the charity world or a small, nimble organisation, technology is presenting more ways than ever to engage people with your cause.

To donate to the Motor Neurone Disease Association, log onto its website [mndassociation.org](http://mndassociation.org)



# ACTION ON HEARING LOSS

We have a limited number of places available in the

## **VIRGIN LONDON MARATHON** (26 April 2015)

**&**

## **PRUDENTIAL RIDE LONDON** (2 August 2015)

contact us now to secure your place!



**Be an Action Hearo and support people with hearing loss.  
To join our team today, contact us on:**

**Tel/textphone 020 7296 8092**

**events@hearingloss.org.uk**

**www.actiononhearingloss.org.uk/events**

Action on Hearing Loss is the trading name of The Royal National Institute for Deaf People.  
A registered charity in England and Wales (207720) and Scotland (SC038926) A0953/1211





# New Year

# New You



Jonas, age 5



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 **Great  
Ormond  
Street  
Hospital  
Charity**



# The World Charity Index 2014

## Introducing City A.M.'s unique ranking of charitable giving from the private sector.

Welcome to this fourth edition of the City A.M. World Charity Index. Its ranking is becoming more and more prestigious, with the increased profile of the index making it worthy of a dedicated special supplement.

This upgraded status makes us, researchers at the Center for Philanthropic Studies at VU University Amsterdam, very grateful for a number of reasons.



Prof. Dr. Theo Schuyt

VU University Amsterdam and University of Maastricht  
Chair of the European Research Network on Philanthropy (ERNOP)



*Media attention for what charity and philanthropy is about will increase both its visibility and value*

### MORE EXTENSIVE RESEARCH

First of all we were challenged to conduct even more extensive research than last year. Ranking is a serious and work intensive task, but also difficult to perform. Ranking philanthropic efforts is still rare. There is little data available, definitions are unclear and criteria are missing. For these reasons, the City A.M. editors asked the scientific community for help to improve their work. Data from other rankings are scarcely available, so we searched all kinds of information sources, including: the Foundation Center New York, the European Foundation Center in Brussels and our research fellows around the world. We have integrated these rankings into one database.

### DEFINITION OF PHILANTHROPY

Secondly we have used a clear definition of philanthropy and philanthropic behaviour. Our definition is that it stands for private actions or donations primarily serving the public good, and we have excluded (commercial) self-interest. We scrutinised – and limited ourselves to – the official documents; and have made a strict division between all kinds of overhead and philanthropic grants. We didn't control the internal financial reports; work that has to be done by professional audit institutions and treasuries. Furthermore we limited our search to institutional donors (not individuals). For further justification of our research: a methodological appendix can be found at [www.cityam.com/giving](http://www.cityam.com/giving).

### CHARITY LOTTERIES AT THE TOP

Our research results in three different rankings: the top 20 largest philanthropic organisations in the world based on all-time expenditure, the top 20 largest philanthropic European organisations and the top 20 largest philanthropic organisations by the amount given in 2013.

Comparing the top institutions with last year there is a change: the Wellcome Trust has been included this year after intensive consultation; the annual report gave rise to questions. Moreover I would like to draw attention to one exceptional organisa-

tion: Novamedia. Nearly all the other foundations in the list are endowed foundations; their grants originate from legacies and donations from corporations or banks. However, Novamedia generates its grants from running charity lotteries in the Netherlands, UK and Sweden.

### WORK IN PROGRESS

As said, ranking and research, are by nature a difficult and ongoing process. The results are here. They are still preliminary; ranking institutional donors is a “work in progress”, as figures are scarce and data mostly second-hand. In research terms: we conducted “second-analyses” without always having the opportunity to check the original sources, and therefore can't be certain they are reliable. This new ranking, therefore, is open for “essential contestability”.

The efforts of City A.M. are an important step. Media attention for what charity and philanthropy is about will increase both its visibility and value.

The more data becomes available, the more philanthropic institutions become visible and publicly accountable and the more the ranking will grow to be a legitimate and authorised list worldwide.

### HOPE AND LOVE

What about philanthropy, the subject matter of the ranking? The philanthropy sector in Europe – and all around the world – is back on stage. For the revival of private pledges for the public good, scholars offer a range of theoretical explanations. May I add one and – perhaps – not an academic one: hope. All around the world we face war, political tensions, threatening diseases. Philanthropy, on the contrary, arises from a positive attitude and mindset.

Philanthropy sees society as an organism. There are differences within society, it is true, and these are sometimes considerable, but it is nevertheless a single entity. In this respect it is possible to make a comparison with religion and ideology. Contributing to the common good, committing oneself to humanity, to future generations and to the preservation of the Earth, all belong to the category “rules for coexistence”, which are present in all world religions and ideologies.

Nelson Mandela wrote a passage about love: “I reminded people again and again that the liberation struggle was not a battle against any group or colour, but a fight against a system of repression.”

“People must learn to hate, and if they can learn to hate, they can be taught to love, for love comes more naturally to the human heart than its opposite.... Man's goodness is a flame that can be hidden but never extinguished.”



# 1 Bill & Melinda Gates Foundation USA £2.169bn 🇺🇸

In a game of word association, most people on hearing the name Bill Gates would immediately say Microsoft. Yet with the Bill and Melinda Gates Foundation having already given away a staggering £20bn since its 2000 foundation, it's a safe bet that in a couple of decades time, the charity will be more famous than the tech giant he co-founded.

It's already the biggest private foundation in the world, and arguably the most powerful. Since billionaire investor Warren Buffett pledged in 2006 to give the foundation most of his fortune, its firepower has almost doubled.

Gates, who has pledged to give away 95 per cent of his wealth, has taken on the charitable sector with the same kind of zeal with which he devised the Microsoft mission to get a PC in every home and business.

## CATALYTIC PHILANTHROPY

The foundation, which focuses on poverty and disease globally, and on education in the US, has gone for what Gates calls "catalytic philanthropy" – basically investing for big returns.

It's taken on big missions: eradicating polio and malaria and has thrown its money into areas which have so far been underfunded.

When the foundation made its first big grant for malaria research – it nearly doubled the amount of money spent on the disease

worldwide. Not because its grant was so big, but because up until then there had been little investment in malaria research.

But the foundation does more than just hand over money, it actively tries to direct the strategy on the issues it targets, partnering with governments agencies, non-governmental organisations (NGOs) and other charities to maximise its effectiveness.

## MAKING BETS

It also funds research, such as into new drugs and vaccines, providing seed funding for various ideas.

"We think an essential role of philanthropy is to make bets on promising solutions that governments and businesses can't afford to make. As we learn which bets pay off, we have to adjust our strategies and share the results so everyone can benefit," Gates says.

And by all accounts the self-declared nerd who dropped out of Harvard and ending up changing the world with his MS-DOS operating system for personal computers, has applied a similar hands on approach to philanthropy.

## EBOLA

"He's a very impressive man. He can talk in detail about health issues and his approach to philanthropy is strategically really sound," says Angela Kail, head of the funders team at



*It is about data and science, as well as about delivering*

**Melinda Gates**





The foundation has said it wants to eradicate both malaria and polio

charity consultancy NPC.

She points out that the foundation's £31m pledge in September to help step up efforts to tackle the deadly Ebola virus in the affected countries was typical.

"The money was split between the on the ground treatment and research, so short and long term. They responded really quickly, but still kept their strategic outlook," she adds.



#### AFRICA

The charity's roots stem back to 1993 when Bill Gates and his wife Melinda went to Africa to see wild animals but ended up getting their first look at extreme poverty.

Gates joined the foundation full time in 2006, and says because he and Melinda, both co-chairs, have built it together, it echoes the partnership he had with his Microsoft co-founder Paul Allen.

Melinda says while her husband takes a data-led approach, hers is more practical – working out, for example, how to persuade people to be vaccinated.

"I think what I've taught him is to take that data and meet with people on the ground to understand, can you actually deliver that vaccine? Because the delivery piece is every bit as important as the science," she says.



A safari trip inspired Bill and Melinda Gates (above) to start the foundation. Billionaire investor Warren Buffett (also above) has pledged to give the foundation most of his fortune



***It is essential to make bets on promising solutions that governments and businesses can't afford to make***

Bill Gates



Wellcome Trust employee poses behind an artwork entitled 'My Soul' by Katharine Dawson

# 2. Wellcome Trust

UK £581.5m 

Victorian masturbation manuals and copulating bull elephants may seem unlikely items for philanthropic support, but both feature in the latest exhibition put on by the Wellcome Trust.

Its exhibition space – the Wellcome Collection – is currently showing The Institute of Sexology, which looks at the science of sex and the pioneers who studied it.

This kind of thing is part of the trust's less well known remit to explore the connections between medicine, life and art.

It's better known for its work to improve human and animal health, where it focuses on supporting talented researchers and accelerating the application of their research in the real world.

But as the trust's director Jeremy Farrar suggests, shows like this, are a way of giving back to the public.

"Researchers don't exist in a bubble outside society and ultimately society owns that research in some way."

The Wellcome Trust has come a long way in a short time. In less than 80 years it's gone from a charity with £75,000 and no offices or staff to one of the highest spending charitable foundations in the world.

The trust funds 4,000 scientists and a wide array of medical and biomedical research including areas such as how genes affect health, how the brain functions as well as working on solutions to combat a variety of infectious diseases.



A scientist part funded by the trust was in the news recently, with his analysis of the DNA from Richard III throwing up shock evidence of infidelity in his family tree, potentially casting doubt on the Tudor claim to the English throne.

Its funding was also key to ensuring data from The Human Genome Project – the complete set of genetic information for humans – was placed in the public domain.

And it was the trust's researchers which developed the Artemisinin anti-malarial drug, which is having a major impact on the treatment of the disease.

Sir Henry Wellcome, born in a log cabin in the US in 1853, is the inspiration behind it all.

As one half of the founding duo of pharmaceuticals giant Burroughs Wellcome & Co, its success enabled him to develop his passions: opening research laboratories and collecting books and objects on the history of medicine on a massive scale.

With no wife (he was divorced) or children to leave it to, Sir Henry merged it all into The Wellcome Foundation which he left to be held in trust saying the capital should be used to advance medical research "to improve mankind's wellbeing" and an understanding of its history. The Wellcome Trust was born.

wellcome trust



***Researchers don't exist in a bubble outside society. Ultimately society owns that research in some way.***

Jeremy Farrar,  
director



3.

Winners of the  
Postcode Lottery  
share millions.

**Novamedia /  
Postcode  
Lotteries  
Netherlands**   
**£470.3m**



**Archbishop Tutu,  
Novamedia CEO  
Boudewijn Poelmann  
and Dutch Prime  
Minister Mark Rutte**

For a Postcode Lottery player their address could be the luckiest thing that ever happened to them. Anyone who wants to play provides their postcode which then becomes their ticket number. Using the postcode means it's not just one participant who wins a prize, but all the players in an entire street (postcode) or neighbourhood (area code).

It's a simple format which like any lottery, offers the opportunity to transform people's fortunes. But in the case of this lottery it's not only the player's luck which will change, but also the charitable causes the lottery supports.

As Archbishop Desmond Tutu summed up it gives people the "joy of playing the lottery and at the same time donating to something worthwhile".

Basically any guilt at having a bit of a flutter can be offset by the fact that up to half of the money a participant spends on tickets goes towards good causes.

The lottery, which began a quarter of a century ago in The Netherlands, has now expanded to both Sweden and the UK. But the mission of its founder charity marketing agency Novamedia – to use the lottery to make the world both fairer and greener – remains the same.

In total, the five charity lotteries chief executive officer Boudewijn Poelmann and his staff runs have donated a whopping £4.7bn to date to a diverse range of charities from plant conservationist London's Kew Gardens to Maggie's Cancer Caring Centres which offers practical, emotional and social support to people with cancer.

Other beneficiaries include global organisations like

Oxfam, Unicef, UNHCR and Greenpeace.

#### DREAM FUND

Novamedia has also set up a so called "Dream Fund", for projects which it believes are both groundbreaking and courageous.

The Peace Parks Foundation, which aims to protect areas that straddle national borders in South Africa and the World Wildlife Fund, which seeks to protect endangered species, have received £11.3m for their joint programme which is trying to save the rhinoceros from extinction.

The charities are working together to try and protect the rhino from criminal gangs seeking to steal its valuable horn. One of their innovative methods includes dyeing the horns of live rhinos in an attempt to make them less attractive to potential poachers. WWF is also establishing an independent Wildlife Justice Commission in The Hague. The commission will collect evidence, prepare legal cases, and coordinate political lobbying and public pressure to stop wildlife crime.

#### MOBILISING SOCIETIES

The lottery also supports causes closer to home. In The Netherlands, where the lottery was founded and where some 40 per cent of the population takes part, it once gave every participating household an LED light bulb to encourage more people to use environmentally friendly lighting.

And this year, it teamed up with consumer goods giant Unilever and retailer Ahold to give 2.5m players a £10 voucher to encourage them to try out sustainable shopping.

#### MAKING GOOD CITIZENSHIP FUN

Its aims are already ambitious, but Poelmann, who is also non-executive chairman of the board of City A.M., says he wants to expand further, eventually setting up charity lotteries worldwide.

Poelmann, who describes himself as a "naive optimist", says fundraising is part of the Postcode Lotteries' DNA.

"We believe the world is better off with strong civil society organisations. Our mission is to raise funds for these organisations and to increase awareness for their work." Our fundraising lottery model with such a high contribution to charities of £5.17bn to date is unique in the world and we're extremely proud of this."

*The Postcode Lottery gives people such as yourselves the opportunity to do something good; there is the joy of playing the lottery and at the same time donating to something worthwhile.*

Archbishop Tutu

## 4.

La Caixa  
Foundation

Spain 🇪🇸

£309m



The foundation helps to find people jobs (above). It also helps to fund affordable housing schemes (below)



La Caixa Foundation's chairman Isidro Faine likes to quote the words of assassinated senator Robert Kennedy to describe the Spanish bank's attitude to charity.

"Senator, Robert F. Kennedy, once said 'the future is not a gift; it's an achievement'. These words remind us that our efforts in the present will determine our future," he says.

The foundation's roots stem directly from the Spanish bank which was set up by Catalan lawyer Francesc Moragas more than a century ago. Moragas had a deep sense of public responsibility and the bank was the first in Spain to provide social insurance.

#### VULNERABLE GROUPS

From 1917 it began to allocate part of its earnings to social projects, playing a pioneering role by donating to causes which had yet to gain any public funding, such as cheap housing, helping to promote women's employment and supporting healthcare.

Its broad aim was to improve people's quality of life. More than a century later, it is continuing the same type of work, with a focus on helping to fight poverty and social marginalisation.

It helps fund education to get people into jobs and provides money for schemes aimed at securing decent and affordable housing. It also supports various health prevention initiatives, as well as giving money towards causes which allow older people to enjoy their later years.

For the past seven years it has given some £390m annually, with two thirds of this dedicated to social programmes.

#### HOPE FOUNDATION

Last year, it created the Fundación de la Esperanza, or Hope Foundation, in the gothic quarter of Barcelona. In partnership with another charity, it helped reopen a temporary home for vulnerable young women between 18 and 25. By the end of the year, this had housed 21 young women and started providing the education and training needed to help them find jobs.

But its work isn't just in Spain. Since 1997 it has also been helping to fund international programmes and last year provided the cash for vaccinations for almost 165,000 children in Honduras and Nicaragua, in total it has now funded vaccinations for an impressive 2m children.



*When we improve a person's quality of life we also improve that of the people around them*

Isidro Faine, chairman





5

## Silicon Valley Community Foundation

USA £231.8m 

It seems surprising that the area surrounding San Francisco Bay in northern California – arguably the world's supreme entrepreneurial hotspot – is in need of charitable assistance.

Yet despite the wealth of some in Silicon Valley thanks to the hi-tech giants and start-ups, there are also what Silicon Valley Community Foundation (SVCF) describes as “stubborn social challenges”.

SVCF focuses its charitable efforts on the Mateo and Santa Clara counties, a region where it says there are more jobs than homes, where one-third of the residents are immigrants and nearly two-thirds of those are under the age of 18.

### FACEBOOK DONATION

SVCF supports hundreds of non-profit organisations every year: among its priorities are education and immigrant integration – thanks to its grants more than 15,000 students received after-school or summer maths instruction and more than 4,500 adults have learned English through non-profit programmes it supports.

The charity made the news late last year when it received a record breaking £633m donation from Facebook founder and chief executive Mark Zuckerberg.

### US LARGEST COMMUNITY FOUNDATION

But it doesn't just target well known names for donations, it's one of the largest community foundations in the world, and aims to make it easier for individuals, families and companies to donate so that they can focus on charitable causes they want to support.

In 2013 it had £3bn in assets under management and received £0.9bn in contributions. SVCF awarded almost £232m in grants across all its funds. Of this, £125.5m went to local charities in Silicon Valley. Through its donors it awards more money to charities than any other community foundation in the US.



Helping immigrants integrate better is one of the foundation's priorities (above). Commuters in San Francisco, one of the areas supported by the foundation (below)



*We invest in  
the common  
good*

Emmett D. Carson,  
CEO

6.

## Robert Wood Johnson Foundation

USA 

£230.9m



When General Johnson spoke everybody listened. I think there's a direct translation from the kind of standards the general had at the company to what you see in the Robert Johnson foundation," says Johnson & Johnson's former chief financial officer Robert Campbell, now a trustee for the Robert Wood Johnson Foundation.

The foundation was set up by Robert Wood Johnson, the founder of healthcare giant Johnson & Johnson, with the lofty aim of improving both the health and the healthcare of all Americans.

Known as "The General" for his services in World War II, the products his firm has created, such as Savlon, Neutrogena and Listerine, have become staples in many households across the world.

When Johnson died in 1968, he left his 10.2m shares, then worth about £770m to the foundation.

"One of the issues the general felt passionately about is that we as a foundation have programmes which address the needs of the most vulnerable in society," says president and chief executive officer of the foundation Risa Lavizzo-Mourey.

In its four decades of existence, the foundation has had a significant impact on healthcare in the US. In the 1970s it was instrumental in the creation of the national 911 emergency medical-response system across the US, and in the 1990s it helped to put tobacco control on the agenda, and has also invested significant sums aimed at improving care at the end of life.

The foundation now focuses on a number of areas including childhood obesity. It recently supported research into the marketing of sugary drinks to young people and campaigns for healthier school meals. Other areas of focus include child and family well being, health insurance coverage, and health system improvement.



***One of the issues General Johnson felt passionately about is that we as a foundation have programmes which address the needs of the most vulnerable in society.***

CEO Risa Lavizzo-Mourey.



**Child health is an important area of focus for the foundation**





## The Walton Family Foundation USA £207.84m



School education is one of the priorities of the Walton Family Foundation

The  
WALTON FAMILY  
FOUNDATION



***We are going to approach philanthropy with the same lack of reverence we gave to the traditional methods of the retail business when we started out there,***

Founder Sam Walton

The Walton family is the richest in America, according to Forbes 2014 list. Their wealth has come from their 51 per cent stake in retailing giant Walmart – the world's largest retailer.

The Walton Family Foundation was set up by Walmart's founders, Sam and Helen Walton, in 1988 when they pledged to shake up the charity sector.

"We are going to approach philanthropy with the same lack of reverence we gave to the traditional methods of the retail business when we started out there," said Sam Walton at the time. He vowed to shake up "time-honoured assumptions" about "how you can motivate ordinary people to do extraordinary things".

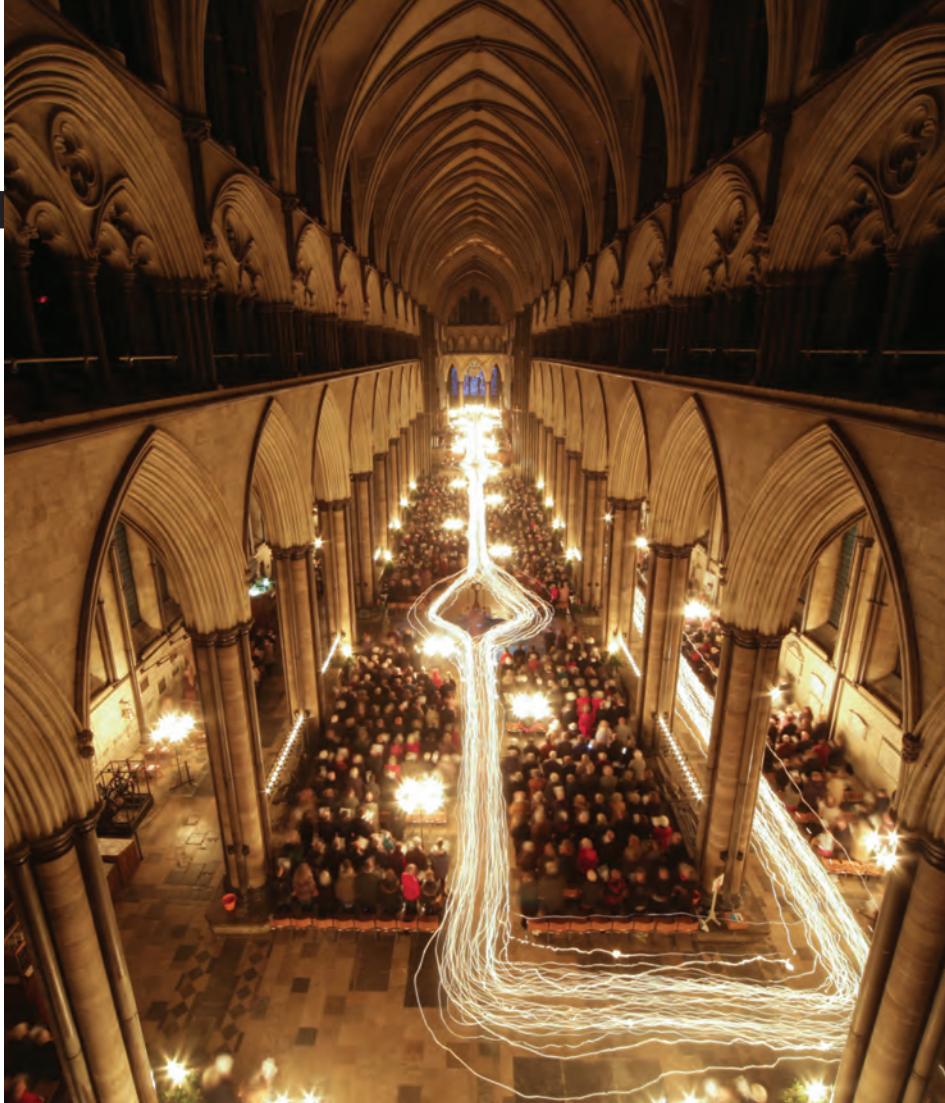
The foundation aims to make a lasting difference in three areas: primary and secondary school education, freshwater and marine conservation and improving the quality of life in Sam and Helen's home of Northwest Arkansas. It granted over £200m in 2013 to projects such as a shark sanctuary in West Papua's Raja Ampat archipelago, a network of marine protected areas in the Bird's Head Seascape in Indonesia, and the recruitment of nearly 4,000 teachers for Teach for America. In the home region of Northwest Arkansas, it funded a programme which seeks to ensure that kids growing up in poverty get an excellent education, and the Amazeum, a children's museum in Bentonville.

However, the second generation of Walton family heirs has been criticised for giving almost none of their own money to the foundation, according to The Walmart 1%. The union-backed body has accused the Waltons of giving much less generously than their billionaire peers and ordinary Americans.

The foundation rebuffed the criticism, saying "Family members living and deceased have provided generously for the foundation".

# 7.





***I pray that as the Commissioners continue to support the ministry and mission of the Church by providing financial support, we will see continued growth and new areas of opportunity.***

Justin Welby,  
Archbishop of  
Canterbury

# 8

## Church Commissioners

UK **£207.8m** 

“There is no greater joy than helping a young person explore more about God and the big questions of this universe, as they journey through this life,” says Jane Gillis, a school community worker at Christ Church Clifton, who is working with local schools to provide spiritual development opportunities.

Gillis’ work is one of many religious projects aimed at young people that the Church Commissioners helps to fund. It contributes more than £40m annually in the form of grants to dioceses, used mainly for clergy stipends, plus grants towards the Church Urban Fund and the Archbishops’ Council’s youth evangelism fund, for projects to enable young people to share their faith with peers as well as projects with a local focus.

In total, the Commissioners contribute 15p in the pound to the cost of running the Church of England, with the rest coming from parishioners.

The body’s main role is supporting the Church of England by managing its investment portfolio – valued at £6.1bn last year, and it can trace its history back to “Queen Anne’s Bounty” of 1704, set up to support poor clergy.



**Members of the Canterbury Cathedral Girls Choir, right. The interior of Salisbury Cathedral is illuminated by trails of candles carried by choristers, above; Salisbury Cathedral is one of the cathedrals supported by Church Commissioners**



It manages investments within ethical guidelines: this means they do not make direct investments in companies if their revenues from defence, tobacco, gambling, high cost lending, pornography and human embryonic cloning exceed thresholds specified by the Church’s Ethical Investment Advisory Group.

“I pray that as the Commissioners continue to support the ministry and mission of the Church to the nation by providing financial support, we will see continued growth and new areas of opportunity,” says Justin Welby, the Archbishop of Canterbury.



A main area of focus for the David and Lucile Packard Foundation is the environment



# 9.

## David and Lucile Packard Foundation

USA £184.8m 

“Think first of the other fellow,” was the first of David Packard’s 11 rules summing up his approach to life. Packard, one half of the duo which set up computer manufacturing giant Hewlett Packard, at one stage one of the world’s largest tech firms, started the company in a Californian garage with just \$538m (£344m). With such entrepreneurial flair, it’s hardly surprising the foundation he started with his wife Lucile has gone on to be so effective.

This year marks the 50th anniversary of the charity which was set up in 1964, to promote positive, lasting change in the areas the couple cared most about—the environment, science, children, reproductive health and their local community.

With an estimated £4.3bn firepower, the foundation admits its resources are small compared to the challenges it’s seeking to solve, so it invests carefully.

This year it’s handed out some £320,000 to groups aiming to build stronger and more vibrant communities in the couple’s home state of California. It’s also granted over £500,000 to the Sustainable Conservation organisation – helping to fund new technologies to reduce greenhouse gas emissions and nitrogen pollution on California dairies.

Packard once said: “I have observed that money left without special guidance is sometimes used well and sometimes not.” One assumes that if he were alive today, he would be proud of the foundation, which today both his children and grandchildren help to run.

the David & Lucile Packard  
FOUNDATION

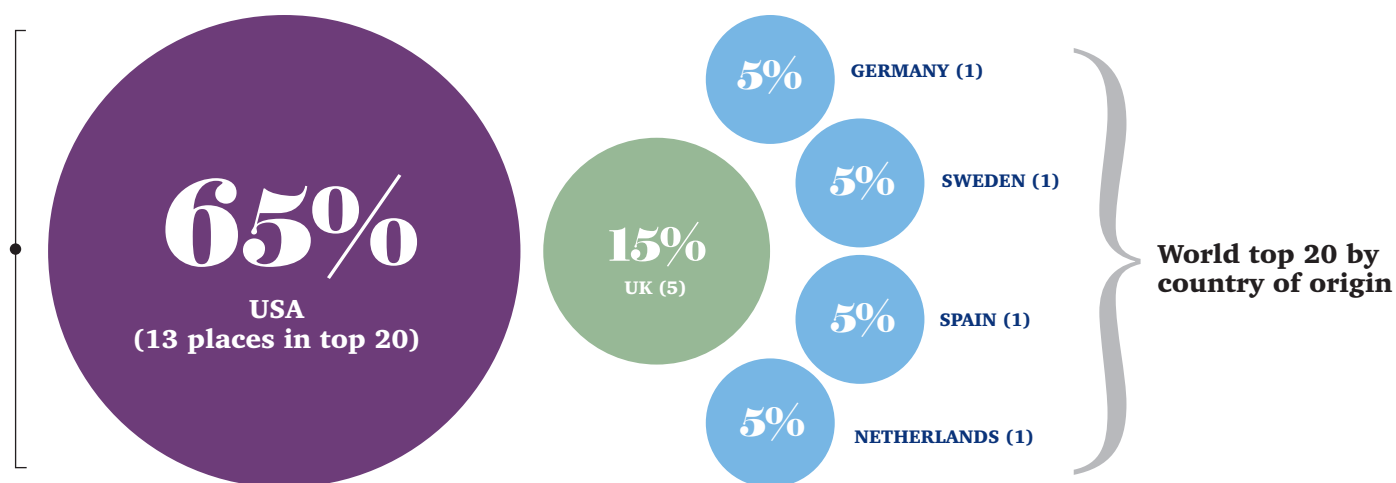


David and Lucile Packard



**Think first of  
the other  
fellow.**

David Packard,  
founder



## World's top 20 donors 2014

Rank / Organisation	Country	Founded	Total
1 Bill & Melinda Gates Foundation	USA	2000	£2.169bn
2 Wellcome Trust	UK	1936	£581.5m
3 Novamedia / Postcode Lotteries	Netherlands	1989	£470.3m
4 La Caixa Foundation	Spain	1990	£309m
5 Silicon Valley Community Foundation	USA	2007	£231.8m
6 The Robert Wood Johnson Foundation	USA	1972	£230.9m
7 The Walton Family Foundation	USA	1987	£207.84m
8 Church Commissioners	UK	1948	£207.80m
9 David and Lucile Packard Foundation	USA	1964	£184.8m
10 Gordon and Betty Moore Foundation	USA	2000	£174m
11 Open Society Foundations	USA	1979	£162.7m
12 William and Flora Hewlett Foundation	USA	1967	£151.9m
13 Andrew W. Mellon Foundation	USA	1969	£149m
14 John D. and Catherine T. MacArthur Foundation	USA	1978	£146m
15 Knut and Alice Wallenberg Foundation	Sweden	1917	£137.4m
16 The Atlantic Philanthropies	UK	1982	£136.7m
17 Volkswagen Foundation	Germany	1961	£136.2m
18 Wells Fargo Foundation	USA	1979	£119.6m
19 Bank of America Charitable Foundation	USA	1985	£114.5m
20 W.K. Kellogg Foundation	USA	1930	£110m





Gordon and Betty Moore



# 10.

## Gordon and Betty Moore Foundation

USA £174m 🇺🇸

Considered one of Silicon Valley's founding fathers, Gordon Moore is another seminal figure in the history of computing to make it into the top 20 of the City A.M. Charity Index.

Almost five decades ago, Moore predicted computing power would double every two years – the so called “Moore’s Law”. His prophetic prediction (The desktop computer had yet to be invented) foretold the continuous stream of faster, better and cheaper hi-tech products which we’ve come to expect today.

He went on to co-found chip maker Intel, where he served as both executive vice president, chief executive and chairman.

Just before he retired from the firm, Moore and his wife established the Gordon and Betty Moore Foundation. It focuses on the three areas the couple are committed to improving: environmental conservation, patient care and science. On top of this, it works to support land conservation and science learning in the San Francisco Bay Area.

“I’d rather do a few big things that have an impact than a lot of little things. Swing for the fences,” says Moore.

One of the foundation’s primary areas of focus is funding research aimed at helping to harness the potential of big data for both basic research and scientific discovery, such as the creation of an Earthquake Early Warning (EEW) system.

Improving the US healthcare system is another ambitious focus. It is funding work, aimed at redesigning and improving communications between doctors and patients.



**Improving the US healthcare system is one of the ambitious focus points of the foundation**

GORDON AND BETTY  
**MOORE**  
FOUNDATION



***I’d rather do a few big things than a lot of little things. Swing for the fences.***

Gordon Moore,  
founder

## 11.

Open Society  
Foundations

USA

£162.7m\* 

**B**illionaire investor George Soros is best known as “the man who broke the Bank of England” for his bet against the pound which saw him profit when Britain crashed out of the Exchange Rate Mechanism in 1992.

Long before then in 1979, when he says he “had made more money than I needed for myself and my family,” he established Open Society Foundations to “promote the values and principles of a free and open society”.

The term “open society” – essentially a tolerant society allowing different views and in which people’s individual rights are protected – was popularised by philosopher Karl Popper who taught Soros when he was at the London School of Economics.

“All our social institutions are imperfect and ought to hold themselves open to improvement that is the ideal of an open society,” says Soros, who is now chair of the foundation.

The foundation started out by supporting scholarships for black students at the University of Cape Town in South Africa and for Eastern European dissidents to study abroad, and is now active in more than 100 countries.

It works with local communities to support human rights, freedom of expression and access to education and public health facilities, and has an in house law firm to help defend the rights of the groups it supports.

“We try to understand who is vulnerable, who is marginalised, who is oppressed society by society place by place,” says Open Society’s president Chris Stone.

Over the last 30 years, it has donated more than £7bn to various causes including £950m on aiding democratic development in Eastern Europe and the former Soviet Union, and £1.3bn on education projects ranging from pre-school to higher education reform.



***We try to understand who is vulnerable, who is marginalised, who is oppressed, society by society, place by place,” president Chris Stone***



**Open Society Foundations works with local communities to support human rights, freedom of expression and access to education and public health facilities**

\* The Open Society Foundation failed to provide a 990 or other official document with financial information for 2013. However, an official 990 for 2012 was available and unofficial reports indicated an increase in its charitable expenditure. We therefore assumed an at least equal amount of charitable expenditure in 2013, giving it 11th place in this year’s index.





One of the foundation's goals is supporting education in its home state California

# 12.

**William and Flora Hewlett Foundation** USA **£151.9m** 🇺🇸



Flora and William Hewlett

THE WILLIAM AND FLORA  
**HEWLETT**  
FOUNDATION



***"Never stifle  
a generous  
impulse"-  
William  
Hewlett,  
founder***

**N**ever stifle a generous impulse," was one of William Hewlett's favourite sayings and he kept his word. Hewlett, one half of the duo that set up computer manufacturing giant Hewlett Packard, has proved just as generous as his HP co-founder David Packard.

In fact, it was the personal generosity of Hewlett, who passed away in 2001, that has made the Hewlett Foundation one of the nation's largest, with assets of more than £5bn.

Hewlett set up the foundation with his wife Flora and their eldest son Walter in 1967.

The foundation's ambitious goals include helping to reduce global poverty, limiting the risk of climate change and supporting education and performing arts in their home county California.

Just like the Gates Foundation, it combines giving grants for immediate help with a programme of robust analysis, measuring the impact of its programmes and adjusting its work accordingly.

Fitting for a foundation that originates from the wealth of a computer pioneer, last month the Hewlett Foundation announced \$45m (£26.6m) in grants to MIT, Stanford and Berkeley to establish major new academic centres for cyber security policy research.

The research will focus on laying the foundations for smart, sustainable public policy to deal with the growing cyber threats faced by governments, businesses, and individuals. The foundation has now committed some \$65m (£41.4m) over the next five years to strengthening the nascent field of cyber security, the largest such commitment to date by a private donor.



MASS MoCA, Boston, supported by the foundation, is one of the largest US centres for contemporary visual and performing arts (right); above, their annual Fresh Grass Music Festival



*He excelled in four fields: as a banker, politician, art collector and as a philanthropist*

Prof. David Cannadine, Princeton University

# 13.

## Andrew W. Mellon Foundation

USA **£149m** 

Andrew Mellon was part of the same generation as well known figures John Rockefeller, Andrew Carnegie and Henry Ford. But Princeton University professor David Cannadine says even among such notable contemporaries, Mellon was unique. “He excelled in four fields of endeavor: as a businessman and banker; as a politician and statesman; as an art collector; and as a philanthropist,” he says.

During his life, Mellon gave away nearly £6.4m with his most famous gift being the money and the artwork to establish the National Gallery of Art in Washington, DC.

When Mellon passed away in 1937, his son and his daughter established separate foundations, which were merged in 1969 to create the Andrew Mellon Foundation.

The foundation aims to safeguard the arts and cultural heritage of the US.

Over the past 45 years, the foundation’s assets have grown from £134m to almost £4bn. Last year, the foundation granted £149m to a variety of projects aimed at preserving the artistic and cultural heritage of the US as well as supporting the study of human culture.

In June, the foundation pledged a £6.4m grant to the Detroit Institute of Arts (DIA) to enable the museum to hold its collections for the public in perpetuity, thus preserving one of the nation’s great cultural treasures.

The foundation said the grant was “unusually large” for a single institution, but recognised the “significance of the DIA for the ongoing recovery and renewal of Detroit”.



**Businessman, banker and art lover Mellon**



14

**John D. and  
Catherine  
T. MacArthur  
Foundation**  
USA **£146m** 



The MacArthur Foundation is probably best known for its so-called “genius grants” – more formally known as the MacArthur Fellowships. These are grants of £399,000, spread out over a five-year period, given to individuals “who show exceptional creativity in their work and the prospect for still more in the future”.

Since 1981 over 900 MacArthur Fellows have been named: no strings are attached to the grant, and recipients have included scientists, historians, poets and novelists, artists and composers. Around 20 to 25 are named each year from 2,000 nominations.

“The MacArthur Fellowship is not a lifetime achievement award; we are looking for individuals on the precipice of great discovery or a game-changing idea,” the foundation says.

But the MacArthur Foundation does more than this – as one of the largest independent foundations in the US it also works to defend human rights, advance global conservation and security, make cities better places, and understand how technology is affecting children and society.

Its international programmes focus on international issues, including human rights and international justice.

The US programmes address issues in the United States, including community and economic development; housing, juvenile justice reform and education, while the media, culture, and special initiatives support public interest journalism, including analytical and investigative news reporting and documentary films.

The foundation had assets of £4bn at the end of last year. During the year it spent £50.4m on its US programme, £48.9m on its international programme and £34.9m on its media, culture and special initiatives. In contrast the MacArthur Fellows Programme costs £7.47m.

MacArthur  
Foundation



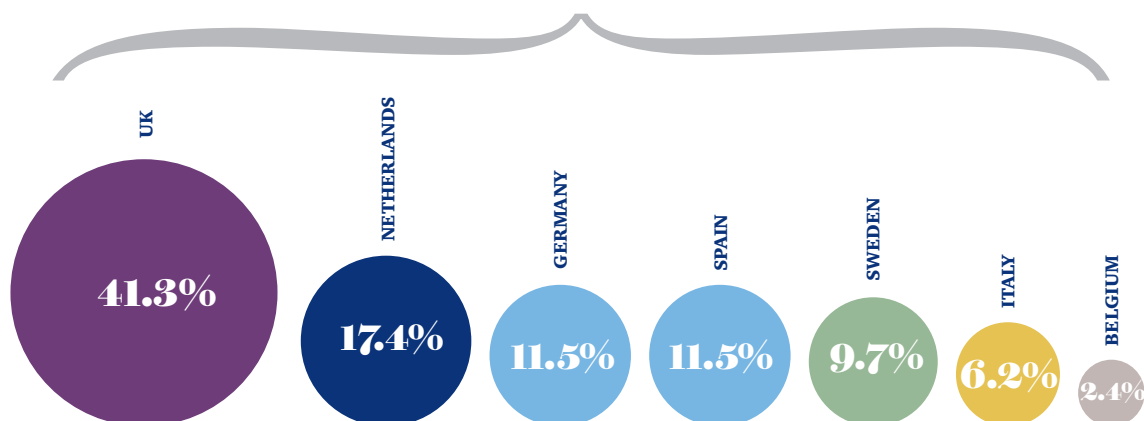
***The  
MacArthur  
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the precipice  
of great  
discovery or a  
game-  
changing idea.***

Cecilia A. Conrad, Vice  
President, MacArthur  
Fellows Program

A quiet  
philanthropist: John  
D. MacArthur



## Europe top 20 by donation per country



## Europe's top 20 donors 2014

Rank / Organisation	Country	Founded	Total
1 Wellcome Trust	UK	1936	£581.5m
2 Novamedia / Postcode Lotteries	Netherlands	1989	£470.3m
3 La Caixa Foundation	Spain	1990	£309m
4 Church Commissioners	UK	1948	£207.8m
5 Knut and Alice Wallenberg Foundation	Sweden	1917	£137.4m
6 The Atlantic Philanthropies	UK	1982	£136.7m
7 Volkswagen Foundation	Germany	1961	£136.2m
8 Compagnia Di San Paolo	Italy	1991	£105.2m
9 IKEA Foundation	Sweden	1982	£85.7m
10 KBS Koning Boudewijnstichting	Belgium	1976	£63.3m
11 Fondazione CRT	Italy	1991	£62.8m
12 Robert Bosch Foundation	Germany	1964	£59.4m
13 Children's Investment Fund Foundation	UK	2003	£52.4m
14 The Leverhulme Trust	UK	1925	£52.2m
15 Garfield Weston Foundation	UK	1958	£49.7m
16 Deutsche Fernsehlotterie	Germany	1948	£43.9m
17 Deutsche Bundesstiftung Umwelt	Germany	1990	£37.6m
18 Riksbankens Jubileumfond	Sweden	1962	£37.4m
19 The Wolfson Foundation	UK	1955	£33.7m
20 Bertelsmann Foundation	Germany	1977	£33.7m





***It may be  
egotistical to  
make  
donations  
while one is  
still alive, but  
it certainly is  
fun***

Knut Wallenberg,  
founder



The Knut and Alice Wallenberg Foundation is part of a group of some 10 family Wallenberg foundations, all aimed at supporting science

# 15

## Knut and Alice Wallenberg Foundation

Sweden £137.4m 

**I**t may be egotistical to make donations while one is still alive, but it certainly is fun," said Knut Wallenberg. The banker and politician started the foundation when he was 65 after being bedridden with illness for almost a month. With no children, he thought it was time to start thinking about what happened with his wealth once he and his wife Alice had passed away.

As one of Sweden's wealthiest individuals, he'd already been inundated with requests, leading him to say: "I am inclined to give away most of my fortune at once, in order to be left alone and to simply say no to everyone."

Hence, in 1917 the Wallenberg Foundation was established with £1.7m and the aim of promoting scientific research, teaching and education of benefit to Sweden.



As one of the largest private financiers of research in Europe, it makes grants in two main areas: research projects of high scientific potential and support of "excellent" scientists.

The foundation primarily grants funding in natural sciences, technology, and medicine and since its foundation it has made grants totalling more than £1.36bn.

This year, it announced the launch of an initiative to create a new centre for molecular medicine at the University of Gothenburg, with funding of at least £1.7m from the foundation.

"We're looking to boost core skills so that Sweden can once again lead the world in this field," said Peter Wallenberg Jr, vice chairman of the foundation.



Reconciliation/*Hands Across the Divide*, by Maurice Harron, Derry City, Co Derry, Ireland - Ireland is one of the areas the Atlantic Philanthropies is still active in



*People of substantial wealth potentially create problems for future generations unless they accept responsibility to use their wealth to help worthwhile causes*

Chuck Feeney, founder

# 16.

## The Atlantic Philanthropies

UK **£136.7m** 

**I** believe that people of substantial wealth potentially create problems for future generations unless they themselves accept responsibility to use their wealth during their lifetime to help worthwhile causes,” said Chuck Feeney, who set up The Atlantic Philanthropies in 1982.

Feeney made his fortune by starting the DFS duty free shopping giant, and argues that those fortunate enough to amass great wealth should use their wealth for a greater good. In the mid-1980s, Chuck quietly gave most of his wealth to the foundation: he's known for his frugality and owns neither a home nor a car and wears a £10 watch.

The Atlantic Philanthropies has made grants of more than £4.15bn focusing on promoting education, health, peace, reconciliation and human dignity in Australia, Bermuda, Northern Ireland, the Republic of Ireland, South Africa, the United States and Vietnam.

*The*  
**ATLANTIC**  
*Philanthropies*

For example, the foundation has worked to promote reconciliation and peace in Northern Ireland and South Africa, and successfully campaigned to abolish the juvenile death penalty in the United States.

The foundation is now winding down – it has already made its final grants in some areas but remains active in Northern Ireland, the Republic of Ireland and the United States. By the time it makes its last grant in 2016 it will have contributed £4.8bn.

In his biography, *The Billionaire Who Wasn't*, Feeney said, “I had one idea that never changed in my mind—that you should use your wealth to help people.”

And the impact of Feeney and the foundation has gone further – his philosophy of “Giving While Living” was also an inspiration behind the Giving Pledge, an initiative created by Warren Buffett and Bill and Melinda Gates to persuade many of the world’s richest people to give their wealth to philanthropy.



17.

**Volkswagen  
Foundation**Germany **£136.2m** 

With overall funding of around £118m a year the Volkswagen Foundation (Volkswagen Stiftung), based in Hanover, is Germany's largest private science research funding foundation.

Since it was founded more than 50 years ago, the foundation has given more than £3.3bn to support over 30,000 projects.

While the foundation shares a name with the motor giant they are not affiliated although there is a historical link. The original funding for the foundation came from the German federal government and the Federal State of Lower Saxony, in the form of the proceeds of the privatisation of what is now the car company.

The funds allocated by the foundation are generated from its capital and assets – currently about £2.14bn. It also receives funds from the dividends earned from the 30m Volkswagen AG shares held by Lower Saxony which are used for projects in that region.

The Volkswagen Foundation supports the humanities and social sciences as well as science and technology in higher education and research. The Foundation develops its own funding initiatives with a focus on “pioneering future-oriented” fields of research.

In particular it aims to provide support for junior researchers and seeks to foster cooperation between researchers across the borders of disciplines, cultures, and national states. It also places a strong emphasis on facilitating structural improvements to education and research in Germany.

Last year the foundation allocated £126m to support outstanding scholars and scientists as well as research and education projects.



**Sculptures of Eckard II and Uta in Naumburg cathedral, Germany, restored with support from the Volkswagen Foundation**

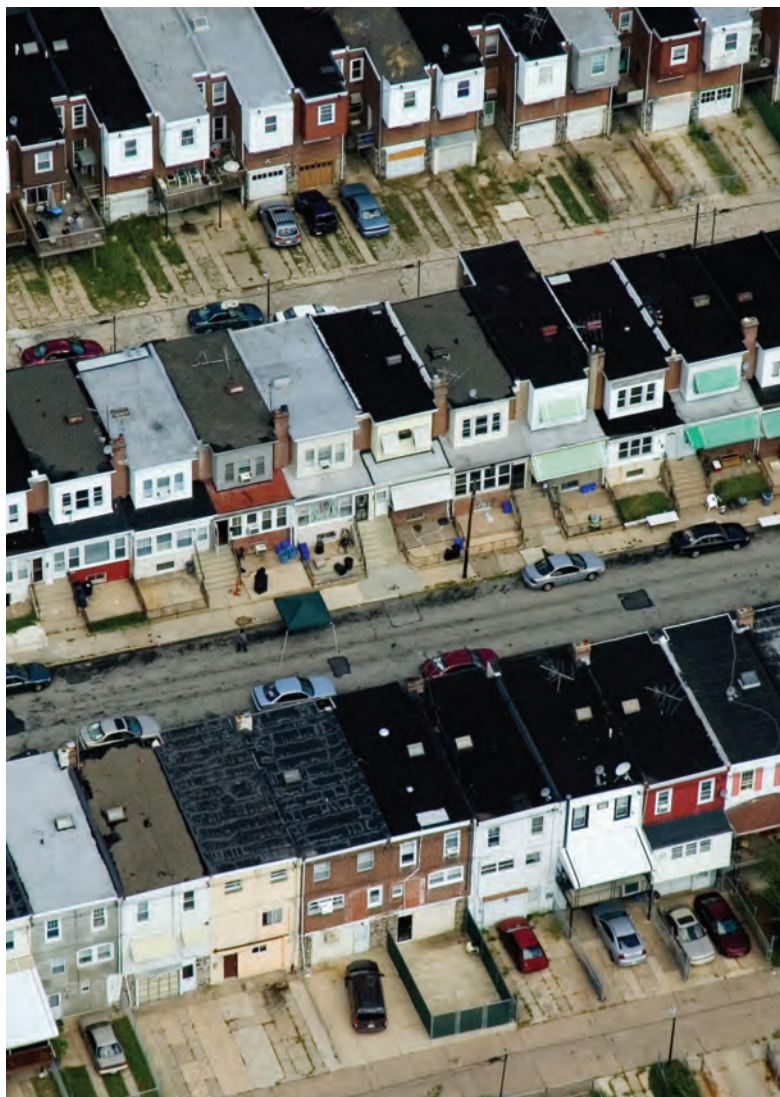


***We are actively involved in generating impulses for research at the cutting-edge of existing knowledge***

Secretary General  
Dr Wilhelm Krull



Aerial view of a  
neighborhood in  
Philadelphia,  
supported by the  
Wells Fargo  
Foundation



# 18.

**Wells Fargo  
Foundation**

USA **£119.6m** 

**WELLS  
FARGO**



***Our  
company's  
vision and  
values have  
always  
included a  
focus on  
prosperity  
and quality of  
life for  
everyone in  
our  
communities***

Jon Campbell,  
Government and  
Community Relations

“Our company’s vision and values have always included a focus on promoting long-term economic prosperity and quality of life for everyone in our communities,” says Jon Campbell, head of Wells Fargo’s Government and Community Relations team.

The American financial services firm traces its roots back to 1852 when the first Wells Fargo opened for business in the gold rush port of San Francisco, and it’s proud of its local roots.

“We weren’t born as a national bank that then decided to be local. We were born as a local bank in one community that does business on Main Street and grew into a family of many local banks in many communities that only then became national,” it says when describing its values.

Similarly, its charitable efforts are firmly focused towards organisations trying to strengthen local communities and it gives to charities which concentrate on community development, education and human services.

In 2013, it invested £119.6m in 18,500 non-profit firms and schools nationwide.

One of the charities it supports is Operation Homefront, which assists military families during difficult financial times. In 2013, it donated 86 homes to military veterans.

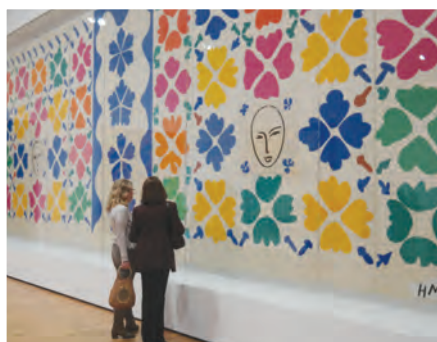
It has also developed a free financial education programme, which last year was incorporated into social studies classes in 13 schools in Missouri.





# 19.

## Bank of America Charitable Foundation USA £114.5m



The Museum of Modern Art (MoMA) and The Chicago Symphony Orchestra are supported by the Bank of America Foundation

Like Wells Fargo, Bank of America's charitable focus is on helping out local communities. For 2014 it concentrated on three main issues: housing, education and basic human services such as hunger.

Last year, the foundation contributed over £114m to address various issues within communities.

One of the charities it has partnered with for the past 25 years is Habitat for Humanity – a charity which aims to build safe and affordable housing. In September, as part of a new £3.8m investment in the charity, it helped Habitat launch its first multi-city build, which took place over one week in 41 different communities globally. More than 1,100 of the bank's own staff volunteered during the event.

Andrew Plepler, who runs corporate social responsibility at Bank of America, said it is "very proud" of the partnership which showed the "impact that our financial and human capital can continue to have".

It has also worked with military veterans to help them transition from active duty, providing jobs, training and education.

For the past seven years, it has also worked with WorkReady Philadelphia, a charity which works to improve the employment opportunities for young people living in the city.

Last year, the bank provided funding for 41 work experiences for young people from the city.

Bank of America



***We are very proud of the impact that our financial and human capital can continue to have***

Andrew Plepler,  
corporate social  
responsibility  
executive



**Welfare of children and young people is the main focus for the foundation**

***If I am successful in getting out of debt, and become prosperous, I expect to make good use of any wealth that may come to me***

Will Keith Kellogg

# 20.

## W.K. Kellogg Foundation

USA £110m 🇺🇸

"If I am successful in getting out of debt, and become prosperous, I expect to make good use of any wealth that may come to me," wrote Will Keith Kellogg in 1909 – and he was as good as his word.

The breakfast cereal pioneer went on to become one of the world's richest men, and established the W.K. Kellogg foundation in 1930 with £42m, intending it to promote the welfare of children and young people.

"Use the money as you please so long as it promotes the health, happiness and well-being of children," he told the foundation's trustees.

By 2012, the foundation's assets had grown to more than £4.5bn.

The foundation receives its income primarily from the W.K. Kellogg Foundation Trust, which was set up by Kellogg. The trust also has a substantial stake in the Kellogg



company.

Today, the W.K. Kellogg foundation is one of the world's largest private foundations, operating in the US, Mexico, Haiti, north eastern Brazil and southern Africa.

It focuses its work on early childhood – from before birth to age eight.

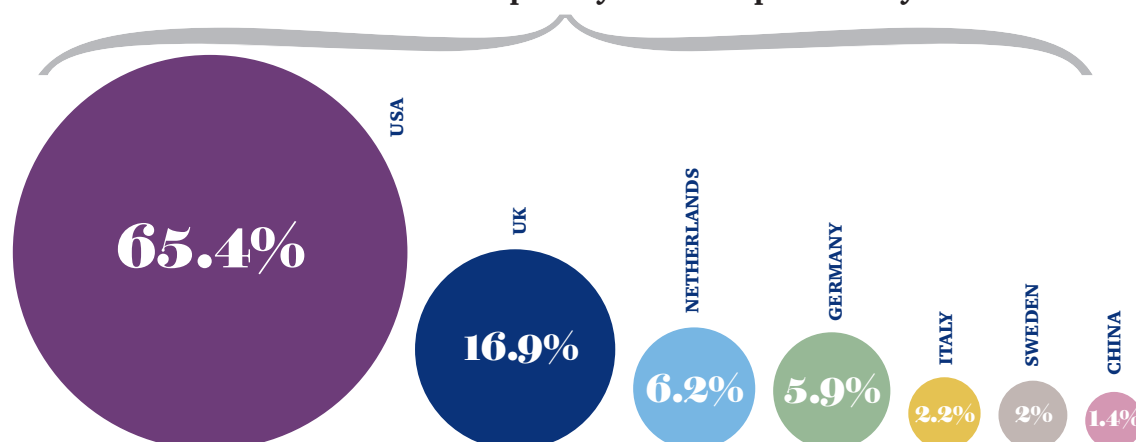
Its goals include increasing the number of children who are reading-and-math proficient by age eight as well as increasing the number of children born at a healthy birth weight and who receive the care and healthy food they need.

Ultimately, it aims to increase the number of children and families living above the poverty level.

The foundation also promotes community and civic engagement and racial equity – arguing both are needed to create an environment where all children can thrive.



World's lifetime top 20 by donation per country



## World's lifetime top 20 donors

Rank / Organisation	Country	Founded	Total
1 Bill and Melinda Gates Foundation	USA	2000	£19.250bn
2 Wellcome Trust	UK	1936	£10.100bn
3 Rockefeller Foundation	USA	1913	£8.953bn
4 Open Society Foundations	USA	1979	£7.035bn
5 Novamedia/Postcode Lotteries	Netherlands	1989	£5.178bn
6= David and Lucile Packard Foundation	USA	1964	£4.157bn
6= The Atlantic Philanthropies	UK	1982	£4.157bn
8 John D and Catherine T MacArthur Foundation	USA	1978	£3.517bn
9 Andrew W Mellon Foundation	USA	1969	£3.473bn
10 W.K. Kellogg Foundation	USA	1930	£3.429bn
11 Volkswagen Foundation	Germany	1961	£3.566bn
12 William and Flora Hewlett Foundation	USA	1966	£2.660bn
13 Fondazione Cariplo	Italy	1991	£1.869bn
14 Knut and Alice Wallenberg Foundation	Sweden	1917	£1.707bn
15 Gordon and Betty Moore Foundation	USA	2000	£1.658bn
16 Deutsche Fernsehlotterie	Germany	1948	£1.401bn
17 Deutsche Bundesstiftung Umwelt	Germany	1990	£1.273bn
18 Li Ka Shing Foundation	China	1980	£1.190bn
19 Robert Bosch Foundation	Germany	1964	£1.019bn
20 Ford Foundation	USA	1936	£895mn



# The sizeable pleasure of City philanthropy

Philanthropy is like sex – every generation thinks they discovered it

T

wo comments overheard in the last month or so indicate that in its own eyes, the City is becoming more philanthropic.

Both came from 40 somethings, involved in the many giving networks for young professionals that are springing up around the Square Mile.

In quiet conversation at after-event networking sessions they both commented, almost disbelievably, along the lines of: "It's really heartening to see these young people so enthusiastic about giving back and wanting to make a difference. They are much more philanthropic than I was at their age."

## A NEW AGE IN PHILANTHROPY

Hardly scientific, I grant you – but it is indicative of a new age of philanthropy in the City among younger people.

Our project is a driving force behind this philanthropic movement. We aim to maximise the philanthropic potential of young, bright, skilled, smart millennials as a force for good. Importantly, we want to encourage businesses to value philanthropy as a crucial part of a successful career and to nurture it though out.

So, after almost two years in the culture change business, can we see a difference? Well, culture change is difficult to measure; its long term nature and enigmatic social dimension almost defy data capture.

There are however visible and measurable indicators that point to growth in numbers and development.



Cheryl  
Chapman

Director at City  
Philanthropy,  
City of London



## TRIBES IN THE CITY

Today we can with confidence say there are more than 1000 City millennials (we are defining them as early 20s to early 40s) involved in giving circles and networks who are donating at least half a million pounds, along with more than £1m worth of pro bono skills.

They are members of a growing number of expanding circles including The City Funding Network, BeyondMe, The Bread Tin, The Philanthropy Club Secret Circle, Inspired 50 and The Engaging Philanthropy Experience Network, and you can find out more about the various models on our website ([www.cityphilanthropy.org.uk/philanthropy-networks](http://www.cityphilanthropy.org.uk/philanthropy-networks)).

What we witness from out helicopter view is that philanthropy in the City is extensive and diverse; made up of different constituencies or 'tribes'.

## BILLIONS AND PRO-BONO

So we know there are scores of major donors from the City such as Winton Capital Investment founder David Harding, who this year made another multi-million pound donation in the form of a £5m gift to the Science Museum. Together, these high rollers have given billions of pounds to charity.

There are organisations such as Impetus PEF (IPEF) and Pilotlight who have created City pipelines of millions of pounds worth of pro bono professional skills (along with funding in IPEF's case) to the charitable sector, helping it scale up and realise sustainability.

There are charitable institutions such as The Livery that



A City Giving Network event held on 2 December (UK's first ever Giving Tuesday) at South Bank's rooftop terrace, raised more than £18,000 in an hour.



89 per cent of executives in pro bono projects reported an improved sense of wellbeing and happiness



gives in excess of £40m a year to a range of causes and largely education, and City Bridge Trust that in 20 years has granted more than £0.3bn to thousands of London charities.

There are hundreds of corporates investing in CSR programmes engaging their employees in community activities and creating millions of pounds worth of value.

There are motivated individuals fundraising millions for causes they believe in.

And there are millions of pounds being invested socially in thousands of enterprises.

Together it adds up to billions of pounds worth of support every year.

### SKILLANTHROPY

More importantly there is a multiplier – and that is the way money and assets are applied. City people and institutions possess financial nous and apply business imperatives. In fact this is one of the divining attributes of the City as Dr Cathy Ross of The Museum of London says in sAs Barclay's Wealth report, *Origins and Legacy: The Changing Order of Wealth Creation* (Vol. 17), shows, the rise of entrepreneurial wealth is triggering change in the world of philanthropy. There is a trend towards a more holistic perspective in both developed and emerging markets.

A clear link between the rise of entrepreneurship and a growing focus on more active, engaged philanthropy is cited in the report. This is an approach that draws on business skills, time commitment and financial donations.

'Skillanthropy' as a key part of philanthropy is a democratising feature. As is pooling resources and giving together. These factors have opened up the well-networked world of philanthropy to a younger age group and allow them to exercise their influence and have a voice. What we see among this younger generation is an appetite to take on the more gritty and unpopular social issues such as homelessness, sex-trafficking and immigration.

### GIVING GIVES BACK

Stephanie Brobbey, a young solicitor at Goodman Derrick LLP and member of the City Funding Network, sums up this attitude among the next generation: "I think as professionals in the City or elsewhere around London we have a growing amount of influence in our various sectors and industries and we are ambassadors for our City as the next generation of leaders. We are perfectly placed, and perhaps one might say more in tune, with some of the needs and causes that are out there and we can be more innovative in our approach to philanthropy."

Another narrative emerging in this new pragmatic world of philanthropy is how it benefits donors and businesses; it is acceptable to talk about how giving gives back.

### PHILANTHROPY CREATES LEADERS

We are seeing a strong connection between those involved in philanthropy and leadership; talent managers and HR departments are finding their high flyers among this community. Swiss financial investment company UBS made a study of those taking part in their CSR schemes and note those who did, performed better in their careers.

It is also now well established that volunteering programmes and CSR activity aid a business' retention and recruitment - retaining the best talent is a source of competitive advantage and high attrition rates are both disruptive and costly in people-centred businesses.

Again UBS offers some evidence; recruiting through its website only it noticed applicants' online journey often began at its CSR pages and ended up in recruitment pages, proving they look to a company's culture as an attractor.

### DOING GOOD FEELS GOOD

We also know professionals gain new career skills and opportunities from taking part in schemes that support charities, as well as improve their wellbeing. Again, data supporting this link is starting to emerge.

The most recent survey comes from Pilotlight, a charity that connects City business leaders with charities, who found 89% of executives it engages in pro bono projects reported an improved sense of wellbeing and happiness.

"There is a wealth of research pointing to the personal benefits of altruism – from physiological benefits to the cardiovascular system, to social benefits such as larger friendship groups to 'ultimate benefits' such as greater sense of life satisfaction," says Dr Beth Breeze, Director of the Philanthropy Centre at the University of Kent, who carried out the survey.

### PHILANTHROPY IS LIKE SEX

It is worth noting at this point that what we see today is a continuation of almost a thousand years of exuberant philanthropy in the City, the evidence of which we see around us today in the form of hospitals, churches, schools, housing associations, buildings and ways of giving. You can find out more at our exhibition *Philanthropy: The City Story* now showing at Guildhall Library in the City.

And it's a point that leads me to my favourite overheard comment this year: "Philanthropy is like sex – every generation thinks they discovered it."

This generation may not have discovered philanthropy, but they are creating a culture where it is more acceptable to talk about it and to partake in new and experimental ways.



# A lottery where everybody wins

Players of People's Postcode Lottery have raised over £56m for charity and they aim to raise even more next year

**f**ancy your luck this Christmas? Well, deciding to play People's Postcode Lottery (PPL) isn't a gamble at all when you know that the money you pay is being used to support some of the UK's most worthy causes.

The charity lottery, whose players have raised £56.1m for good causes, requires players to enter their postcode rather than a series of numbers to be in with a chance of winning cash prizes. But what separates PPL from other lotteries is that there is always a daily winner, no prize rolls over to another draw and its players are contributing

50p from every £2 ticket to charities and good causes across Great Britain and internationally.

PPL operates lotteries on behalf of 13 trusts raising funds for practically every worthy cause, from disadvantaged children to rescued animals, culture to sport, Africa to the environment. And it's giving more than ever, which means more money for good causes across the country. According to a report published by PPL this autumn, every £1 given by the lottery is leveraged by charities to generate a further £1.70 in income. This means that the charities are able to use the lottery money to attract even more funding.

## PLAY

People's Postcode Lottery organises five draws a month with prizes every day and each ticket costs £2, paid monthly in advance by direct debit, credit card or PayPal online at [postcodelottery.co.uk](http://postcodelottery.co.uk) or by calling 0808 1098765.



## Q&A

### Lorna Menzies PPL's Deputy Managing Director



#### When was People's Postcode Lottery (PPL) founded and how has it grown from its original concept?

In 1989 Novamedia launched the Dutch Postcode Lottery using the concept of playing with your postcode, and helping good causes at the same time. This was followed by two further lotteries in the Netherlands; the Friends Lottery in 1998 and BankGiro Lottery in 2002. In 2005 the Swedish Postcode Lottery was established, and after a successful pilot in Northern England in 2005, PPL was launched in 2008.

#### Do you have a mission statement that sums up PPL?

Our mission, along with our sister lotteries, is to organise lotteries to raise funds for charity organisations working for people and planet and to increase awareness of their work.

#### How many charities do the 13 trusts now support?

People's Postcode Trust has supported over 1,350 projects and awarded more than £8.3m in funding. The remaining trusts, who receive funds directly from players of PPL, regularly support an incredible 53 charities with large and unrestricted funding awards.

#### 50p from every £2 ticket goes to good causes, but how do you distribute the money to charities afterwards?

Funds awarded can range from £500 to over £500,000. Each Trust has a Board of Trustees which decides which charities or good causes receive funds according to the activities they support and how much they should receive.

#### Do you have a favourite memory from the past year that illustrates how the PPL has changed a charity's fortunes?

In 2014 a project based in Glasgow called Play on Pedals was awarded £231,957 in funding from the Dream Fund on behalf of players of PPL. This project, the first of its kind in Britain, aims to get every four-year-old child in Glasgow on a bike. As someone from the West of Scotland, I get to see first-hand the positive impact this funding is having on the area. The opportunity for these children to get cycling from such a young age gives them independence, the opportunity to develop new skills and a fun way to maintain a healthy lifestyle.

#### If you're a charity that is looking for funding, how do you get in touch with the PPL?

Charities can apply for project specific funding from £500 to £20,000 at [postcodetrust.org.uk](http://postcodetrust.org.uk)



## Good causes Just some of the charities supported this Christmas



### BATTERSEA DOGS & CATS HOME

Christmas isn't a relaxing time for everyone, especially not the 400 dogs and 250 cats waiting for new owners in Battersea Dogs & Cats Home. Many of the animals, like Gizmo the staffie (pictured), get anxious and depressed in the kennels and catteries so the charity tries to entertain them and keep them feeling as festive as the rest of us. Players of PPL recently funded a £50,000 grant, out of a total award of £175,000, which will pay for a Battersea Stress Squad to lavish them with attention and affection. "Thanks to this generous Christmas award from players of PPL," says Sarah Whiffen, canine welfare trainer at Battersea, "we're able to provide bundles of new toys and treats to make sure there's always an interesting sight, sound or smell to keep our animals occupied. In the spirit of the season, this will mean things like jingle bells for cats, festive chew toys for dogs and – of course – lots of attention from the Squad themselves."

**To find out more about Battersea Dogs & Cats Home, call 0843 509 4444.**



### ROYAL VOLUNTARY SERVICE

This Christmas, players of PPL will award £300,000 to the Royal Voluntary Service to give lonely older people company over the festive season. Research by the charity found that nearly half a million elderly people are set to spend Christmas alone this year. The charity, established over 75 years ago, will use the funds to grow its Good Neighbours service, which offers companionship and practical help, whether it's getting food shopping or just having a cup of tea and a conversation. Around 35,000 volunteers help over 100,000 older people nationwide, providing Meals-on-Wheels, Books-on-Wheels and post-hospital care. Royal Voluntary Service chief executive David McCullough says, "Never underestimate the power of a friendly face popping in for a cuppa and a chat. It lifts everyone's spirits to know someone cares, but imagine how much of a lifeline it would be if that was the only person you saw."

**To volunteer for the Royal Voluntary Service, visit [royalvoluntaryservice.org.uk](http://royalvoluntaryservice.org.uk)**



### APOPO

A Tanzanian-based NGO that trains rats to help in warzones has been awarded £175,000 by players of PPL. Apopo recruits "Hero-rats" to sniff out landmines in Mozambique and Angola, as well as detect tuberculosis in sub-Saharan African countries. The furry rodents are rewarded with bananas if they scratch the ground when they detect explosives, or hold their noses over human sputum samples if they smell TB is present. So far, Apopo has cleared 11m square metres of contaminated land and found over 50,000 explosives in six countries, while rats have identified 7,000 TB patients missed by conventional lab tests. Apopo volunteers also clear leftover explosives in Cambodia and Vietnam. Apopo's chief executive officer Christophe Cox says, "The support from the players of PPL will directly help communities across the globe who every day suffer from the terror of landmines or who are debilitated by TB, getting them back on to their land or back to work as soon as possible."

**To find out more about Apopo, visit [apopo.org](http://apopo.org)**



### THE DAME KELLY HOLMES TRUST

Double gold medal-winning athlete Dame Kelly Holmes believes there's an Olympian in everyone, and that's why she set up a trust in her name in 2008. It helps athletes use their skills and experience to empower young disadvantaged people and it has helped around 170,000 of them to realise their potential so far. Now the Trust will be able to help many more thanks to a £175,000 grant from the players of PPL. "My team rang me when I was on holiday to tell me that the Trust was going to receive the funding," says Julie Whelan, chief executive officer at the Dame Kelly Holmes Trust. "I remember jumping up and down in excitement – such fantastic news. As a team it felt so good that others believe in the work we're doing to transform thousands of lives every year."

**To find out more about the Dame Kelly Holmes Trust, visit [damekellyholmestrust.org](http://damekellyholmestrust.org)**



### BOOK AID INTERNATIONAL

As Book Aid International celebrated its 60th anniversary, players of PPL awarded the charity £175,000 from the donations made by its players. Publisher Pearson was holding an event to honour the work that publishers, volunteers, funders and donors do when PPL announced its grant. Now the organisation, which works with libraries in Africa to support literacy and education, will be able to build Children's Corners in five libraries in Malawi. Upon receiving the grant, Alison Hubert, director of Book Aid International, said, "Book Aid International will be even more ambitious in our work to transform library services for children in sub-Saharan Africa thanks to this generous support from players of PPL. In a region where so many children live below the poverty line and literacy levels are among the lowest in the world, this work is of vital importance to empower young people to build better futures for themselves and their communities."

**To find out more, visit [bookaid.org](http://bookaid.org)**

# Unlocking potential in developing nations

City Index is working with Opportunity International this Christmas to ensure there's a bright future for small businesses in Africa



**S**ecuring funding for your small business can be difficult in the UK, but it's a lot harder in the developing world. Opportunity International, a UK-based charity, is trying to change that because it thinks that a great business idea can lift a family or even a whole community out of poverty. Founded in 1971 by Al Whittaker, former president of Bristol Myers International Corporation in the US and Australian entrepreneur David Bussau, the non-profit organisation was one of the first to recognise the benefits of microfinance – financial services for low-income people – and how this could be used to alleviate poverty in the developing world.

Today, the charity has unlocked the potential of around five million entrepreneurs in 22 countries, providing loans, savings accounts and financial management training to give people a better chance of providing for themselves and their families long-term. Its current appeal, Seeds of Opportunity, hopes to raise funds to support and create employment. A donation of £30 can provide 10 farmers in Ghana with financial training and £150 can help someone develop a small business.

Closer to home, City Index, the spread betting and CFD trading firm in London's Finsbury Circus, is helping to raise money for Opportunity International's Christmas Appeal by donating part of their revenue during December, while boosting trading numbers at the same time. "Our business really values the charitable work that all

**Preston visiting a school in Ghana**

**I've been struck by the quality of Opportunity's staff, who live among the people they serve and really understand the local context.**

**Mark Preston, CEO and chairman of City Index**

our staff do throughout the year, and it makes for a great working environment and promotes team work," says City Index's chief executive officer and chairman Mark Preston.

"Opportunity International's aims of making markets work for poorer people is the perfect strategic fit for our staff and our customers. The more our customers trade, the more we'll donate, allowing us to align activity in the developed financial markets with the much simpler, but vital, needs of those seeking to develop small businesses to help themselves in Africa.

"More importantly for me, it will raise awareness of the challenges faced by Africa's micro-entrepreneurs as well as demonstrating how our help can make such a huge difference in making access to banking services available, which we in the developed world take for granted."

Preston, who has supported the charity for years, recently travelled to Africa to see its work in action. "What really drew me to Opportunity International was the organisation's ability to harness the energy and passion of micro-entrepreneurs across Africa. On my visits to their work in Mozambique and Ghana, I've been struck by the quality of Opportunity's staff, who live among the people they serve and really understand the local context, opportunities and challenges."

A number of other individuals, trusts and charities support Opportunity International's work such as City A.M., Prudential, Clear Channel, Citi Foundation, Goldman Sachs Gives, Vitol Foundation and players of the People's Postcode Lottery.





## Real life

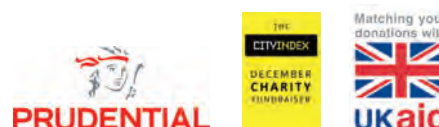
**Lucia Enacio** is a 41-year-old mother from Mozambique, who found herself the sole provider for her nine children following the death of her husband

“My friend told me about Opportunity International and I joined a women’s group. So far I have had one loan, which I used to buy bean seeds and to pay for labour to help me weed and harvest the crop. I now grow soya beans, maize, beans and millet. I have done very well, I made nine bags of maize profit and four bags of bean profit this year. With this, I have been able to pay back my loan and save money for the first time.

“I receive a lot of support from Opportunity International. We meet once a week to discuss our business ideas and financial problems. I have learnt about setting up a business plan and how to manage my loan. I have learnt how to increase the produce from my fields by being able to invest in my business by buying seeds and employing people to help me.

“My life is so much better now. I have been able to pay for my hospital bills, pay for my children’s school fees and books, and now I am hoping to build a good house for me and my children, which we have never had before.”

## DONATE



All donations received before 26 February 2015 will be doubled by the UK government, doubling your impact and transforming the lives of many more people.

**Text OIUK £10 to 70070 to donate £10**  
**Call 01865 725304**

**Visit [opportunity.org.uk/double](http://opportunity.org.uk/double)**  
Send cheques payable to Opportunity International UK to Opportunity International, Angel Court, 81 St Clements, Oxford, OX4 1AW.

# How companies can help communities

Organisations should think outside the box to achieve more social good

Let's say that a single individual, employed at a major financial company or a large corporation, wants to improve the way their organisation contributes to society. She wants to make sure it achieves more "social good". It's an ambitious aim, and not unheard of. What are her options?

There are some obvious initiatives to begin with, which will already be in place at most major companies. Lots of businesses offer 'charity of the year' awards and match-funding for sponsored runs, and so on—and if these are missing, they probably won't be difficult to set up.

Even on bigger projects, our ambitious employee may find less resistance than they expect. Memories of the financial crash might be giving way, finally, to optimism about nascent financial growth, but the financial sector can hardly ignore the reputational damage to the whole sector. Big firms have good PR reasons to show that they are trying to help the communities in which they work.

One task, then, would be to try and influence what this help looks like. Beyond the PR gloss, is the company actually doing something substantial and impactful? More or less anyone can paint a cricket pavilion or host a fundraiser, and it's hard to see why the best brains in the city add particular value here. Wouldn't a small charity benefit much more from a day's pro-bono expert legal advice, for example, or from intensive financial training?

And on the chosen charity: does it fill a gap, and do so effectively? Does your investment help them plan for the future, so that they can think beyond the short-term?

All of this is an adjunct to everyday business, though, and the most powerful argument against even quite thoughtful corporations is that far more damage gets done through business practices than can ever be off-set



Dan Corry  
Chief Executive  
NPC



***Beyond the PR gloss, is the company actually doing something substantial and impactful?***



by separate, marginal actions to help society. It is difficult to argue against this. Many decisions do have a detrimental effect on society, from the way supply chains are developed to environmental footprints and the handling of financial risk. Pushing through pro-societal systemic changes is far more complex.

On the positive side, our employee may also find plenty of allies. Deloitte's Millennial Survey this year found that a majority of the new generation coming through the ranks of big corporations—from graduate recruits to boardroom high-flyers—genuinely care about this stuff. They want to feel good about the company for whom they work, and to show off how they have steered the organisation towards ethically decent decisions. This may also provide a market edge, of course, if the pursuit of social good distinguishes one company positively from those around it.

This will soon hit challenges. How on earth do you measure (and promote to colleagues and bosses) the benefits of a decision to change your supply chain to one more dominated by social enterprise, or to spend more on making sure your factory overseas doesn't burn down? In a field where this sort of work is rare, how do you produce metrics that allow you to compare yourself to others?

That something is hard is never an excuse for not trying, though. People have already started making progress in some areas, especially where there are common metrics, like the amount of carbon produced. Groups like NPC can help you think about social returns, and an organisation like Business in the Community (BITC) can bring its expertise to bear. So too can the grand ideas of impact investing, recently highlighted by a G8 Taskforce, which promises more and better social investment across the world.

Our ambitious, socially-responsible employee need not despair.



## A charitable voyage across the Channel

Patron Capital boss **Keith Breslauer** raised over a quarter of a million for wounded servicemen and women

Most people relax with wine, theatre, a movie perhaps. Not Keith Breslauer. When he's not in the office managing more than £2bn as head of Patron Capital, Breslauer can be found scaling mountains, sailing the seven seas and performing other feats of endurance the mere thought of which makes the rest of us break out in a sweat.

He doesn't do it for the thrills. Patron has close links with a number of charities and Breslauer himself has raised thousands through sponsorship over the years. His latest stunt was his best yet; Breslauer joined 25 retired and serving Royal Marines in a cross-Channel kayaking challenge that raised £215,187 for disabled war veterans.

Starting from Pont en Bessin in Normandy (it was here that a team of 47 commandos overran the Nazi occupied port on June 6 1944), the group travelled 86 nautical miles to Eastney beach at Southsea in Hampshire. Breslauer was the only civilian to make the gruelling 28 hour journey. The cross-channel trip was just one leg of the 1664 Challenge, which marks 350 years of the Royal Marines and includes sailing, skiing, cycling and running.

It's not the first time Breslauer has worked with the Marines. He's also a keen mountaineer, and together with a team of soldiers and fellow Patron employees he scaled the infamous "Nose" route to the summit of Yosemite National Park's El Capitan mountain.

"I'm immensely proud to have kayaked with the Marines from Normandy to Portsmouth," he says, "almost the reverse of the route their ship-borne comrades took on D-Day in 1944. The work that the Royal Marines Charitable Trust Fund does in helping active and retired Royal Marines to overcome the mental and physical scars of active service is exceptional."



Kayak training in the Thames



Breslauer and his chosen mode of transport

## Interview



## André Villas-Boas

**The former Tottenham and Chelsea manager on charity, football and coaching in Saint Petersburg**

**How have you found being an ambassador for the Laureus Sport for Good Foundation?**

I have been an ambassador since 2011. I'm very grateful for the opportunity they have given me to reach out to people who have suffered from all kinds of problems, from social exclusion, to poverty, to disabilities. As a citizen you never feel you're doing enough to fight the hatred and problems that reside in modern society. But to change the life of someone or make them happier for just a couple of hours is very important and something all of us should strive for.

**What other charities have you worked with over the years?**

Further to my work with Laureus I'm actively involved as a patron with Ace Africa, APPACDM Porto and the Sir Bobby Robson Foundation. Ace Africa empowers communities in Africa to be self-sustaining. APPACDM Porto (the association of fathers and friends of mentally disabled citizen) helps disabled citizens and their families with support, social inclusion, accessibility and education. The Sir Bobby Robson Foundation continues to help cancer patients around England and continues to fund investigations into new ways of treating the disease.

**Given the amount of money in football do footballers and footballing institutions do enough for charity?**

Whatever we do, it isn't enough. Though I think most high profile people linked to sports help two to three charities. This is extremely important. The real heroes are the people who work in the background, who volunteer and dedicate their lives to making other lives better. With our image and network of people we try to raise awareness as much as we can. Sport has the power to change the world.

**Is there a culture of giving to charity in Russia?**

In Russia there is a great culture of giving, particularly to young children with extremely limited access to education. The vastness of the country means that to get access to the fundamentals you might end up travelling two or three hours or more, and for that to happen you need to have funds to support those needs. We have a set of charities that we help through FC Zenit.

**How have you found your first season managing in Russia?**

I'm settling very well, really enjoying the experience. The club has offered me great conditions to work and decision making power. This is extremely important. The city and the social life that the city offers is great. The Russians are very socially active. They fill the streets so even on the cold days you get warmth from the people and from the buzz in the city. It's been a great experience so far and I'm very happy with the decision to have come here.



**Laureus Ambassador André Villas-Boas doing his bit, coaching youngsters in London in 2012**

**Talking purely football, are you happy with Zenit's progress?**

We are taking the right steps in order to transform Zenit into one of the top 10 clubs in the world. Of course that requires investment and requires time but the name FC Zenit and its brand is growing and this is extremely important in order to continue to attract top players like we did in the last transfer window. Our focus right now is on the domestic title as that would grant our logo the coveted star that goes with five championship wins.

**How does managing in Russia differ to managing in the uk? How is the media?**

There are different challenges to the Premier League. The league is extremely competitive with five to six clubs investing hard in order to win the title. Spartak, Dinamo, Lokomotiv and CSKA to FK Krasnodar. This makes the league very competitive and difficult. Working out the rest period between trips is also very important as we often travel three to four hours away from Saint Petersburg and sometimes with two to three hours time difference.

**How is your Russian?**

I don't speak Russian yet but I try as much as I can to use football related words in Russian during my training sessions. That is the first step. The next one is to master the language and the alphabet but I think I need one more year for that!





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