



B-SIF

Fundraising 101

Topics Covered

- P2P
- Reward-based fundraising
- Digital fundraising
- Door to door fundraising
- HNI/UHNI fundraising
- Checkout charity partnerships
- Event-based fundraising
- CSR
- Grants
- Matching donations
- Employee Giving
- Legacy Giving
- Endowment funds

P2P



Who: NGOs with a large volunteer base, or NGOs working on widely relatable causes such as health, education, or disaster relief. Also suitable for NGOs that have a significant online/social media presence.

What: Peer-to-peer fundraising involves individuals raising money on behalf of a cause or NGO. They create their personal fundraising campaigns, set goals, and share these with their network. Essentially, individual supporters become mini-fundraisers on behalf of the NGO.

When: When there's a personal story or significant event to anchor the campaign: birthdays, anniversaries, marathons, challenges, or even in response to timely issues/events like natural disasters. It's also effective when the NGO wants to harness the power of community involvement or when there's a specific project needing funding.

How: Choose a P2P Platform >> Train and Equip Supporters >> Launch Campaigns >> Promote and Engage Online >> Monitor and Support >> Thank and Recognize >> Updates.

P2P



Why:

Pros:

1. Engages and mobilizes an NGO's supporter base.
2. Expands the reach to networks outside the NGO's immediate circle.
3. Often digital, so potentially scalable without a linear increase in costs.
4. Can tap into personal stories and motivations, making it more relatable.

Cons:

1. Relies heavily on the commitment and enthusiasm of individual fundraisers.
2. Somewhat unpredictable in terms of funds raised.
3. The NGO has less direct control over messaging and representation.

Where:

Digital Platforms: Numerous P2P-specific platforms like GiveIndia, Ketto, Milaap. Also, social media platforms where fundraisers share their campaigns (Facebook, Instagram, WhatsApp).

Physical Gatherings: While it's primarily digital, P2P campaigns can also be promoted at community events, schools, churches, or any gathering where a supporter can share their campaign.

U&I

[Start A Fundraiser](#)

TOTAL RAISED

₹79,58,787

FROM TARGET ₹1,01,22,500

DONORS

7,309

FUNDRAISERS

1,222

About

THE PROBLEM

In India, there is a significant gap between the rich and poor.

- 9 out of 10 students who study in government schools drop out before the 10th grade.
- Most of the students are first generation learners whose first language is a local language.
- 52% of 5th grade students cannot read 2nd grade text books.
- 56% of 8th grade students cannot do simple division.

[Know More](#)

Reward-based Crowdfunding



Who: NGOs with tangible projects or tech solutions. Ideal for NGOs that can offer a product, experience, or service in return for donations. It's also effective for NGOs that have a compelling story or innovative idea that might appeal to a broad audience.

What: Donors contribute to a campaign in exchange for a tangible item or service. The reward usually varies based on the donation amount, with more generous donations receiving more valuable or exclusive rewards.

When:

1. There's a clear project or product that requires funding.
2. When there's an audience buzz or demand for what's being offered.
3. During product launches or pilot project phases, or when there's a unique event or season that aligns with the campaign (e.g., a holiday or awareness month).

Where:

Digital platforms are the primary space, especially dedicated crowdfunding sites like Milaap360, Kickstarter, Indiegogo, Razorpay.

Offline, it can be introduced at events, workshops, or community fairs where there's a chance to showcase the reward.

Reward-based Crowdfunding



Why:

Pros:

1. Encourages diverse donation amounts by offering tiered rewards.
2. Can attract new donors who are interested in the rewards.
3. Provides a tangible connection between the donor and the cause.
4. Often leads to broader publicity and organic sharing.

Cons:

1. Requires careful planning and resources to ensure rewards are delivered on time.
2. Can shift focus from the cause to the reward.
3. Potentially higher upfront costs.
4. If not managed properly, failed delivery can lead to negative PR.

How:

1. Planning: Identify the reward(s) and set tiered donation levels. Consider costs, delivery timelines, and appeal.
2. Platform Selection: Choose a crowdfunding platform based on fees, audience, and features.
3. Promotion: Launch with a compelling story, clear visuals, and regular updates. Engage influencers or ambassadors if possible.
4. Engagement: Keep donors updated, answer questions, and create buzz with milestones.
5. Fulfillment: Ensure rewards are delivered as promised. This includes manufacturing, packaging, and shipping if physical goods are involved.
6. Post-campaign Engagement: Thank your donors, share project progress, and consider ways to turn them into long-term supporters.

Reward-based Crowdfunding



kickstarter.com/projects/hansfex/mini-museum-3-the-third-edition/rewards

Campaign

Rewards

FAQ ¹²

Updates ²⁰

Comments ⁴²⁹

Community

Share this project

Save

Available rewards

MOSASAUR
\$18

MINI MUSEUM - SMALL
\$129 4 items included

MINI MUSEUM - LARGE
\$299

MINI MUSEUM - COLLECTOR'S LARGE + SMALL
\$399 5 items included

MINI MUSEUM - LARGE + TOUCH
\$599 5 items included

All gone

GREAT PREDATORS IN HISTORY - MOSASAUR
\$18

FRIENDS OF MINI MUSEUM

\$1

Backers

59

Estimated delivery

Apr 2017

Pledge US\$ 1

Backers at this level will receive the pure love and gratitude of Hans Fex and will allow you to follow our journey in bringing the Third Edition of the Mini Museum to life.

GREAT PREDATORS IN HISTORY - MOSASAUR

\$18

Backers

63

Ships to

Anywhere in the world

Estimated delivery

Jun 2017

Limited quantity

37 left of 100

One (1) Mosasaur tooth with informative card describing one of the largest marine reptiles of all time. Arrives in a handsome riker-box display case. Ships in June 2017.

Digital Fundraising



Who: NGOs of all sizes, especially those with an online presence. Suitable for NGOs that have tech-savvy teams or access to digital marketing expertise. This method is highly recommended for NGOs working on youth-oriented causes, tech solutions, or NGOs with international outreach aspirations.

What: Digital fundraising encompasses a range of online methods through which charities and NGOs raise money. This includes online donation platforms, email campaigns, social media drives, crowdfunding platforms, and more. Essentially, it leverages digital channels and platforms to reach potential donors and engage them.

When:

- During specific online events like GivingTuesday or Daan Utsav.
- Launch campaigns in alignment with global events or trending topics.
- When a compelling story or event happens within the NGO that has a potential for virality.
- Ongoing monthly campaigns targeting different donor segments.

Where:

- Own NGO website, having a dedicated donation page/button/link.
- Crowdfunding platforms
- Social media platforms: Facebook, Instagram, Twitter for campaigns.
- Affiliate marketing on relevant websites and forums.

Digital Fundraising



Why:

Pros:

- Scalable and can potentially reach a global audience.
- Cost-effective compared to traditional methods.
- Provides immediate feedback and data for optimization.
- Allows for innovative storytelling via videos, infographics, etc.

Cons:

- Requires understanding of digital marketing tools.
- Dependency on platforms and their regulations.
- Requires continuous updating to remain relevant.

How:

1. Strategy Development: Define clear objectives, target audience, and key messages.
2. Platform onboarding and tech set up
3. Content Creation: Develop compelling stories, videos, and graphics to communicate your cause.
4. Promotion: Use organic posts, sponsored ads, email marketing, and partnerships to promote the campaign.
5. Engagement: Engage with donors, respond to comments, and encourage sharing.
6. Analysis & Optimization: Use analytics to track performance and adjust strategies accordingly.
7. Stewardship: Thank donors, provide updates on how funds are used, and cultivate relationships for long-term support.

Digital Fundraising



You Will Make a Difference

Make the world better, kinder, brighter. Every dollar you give will create real change. Donate to educate under-privileged children in India

 Secure donation

Give once

 Monthly

₹20K

₹10K

₹5,000

₹2,000

₹1,000

₹500

₹ 2,000

INR ▾

[Add comment](#)

Donate

Door to Door Fundraising (F2F)



Who: NGOs with a compelling and relatable cause, ideally those with a local presence or immediate community impact. Smaller to mid-sized NGOs that can benefit from community engagement and whose stories resonate on a personal level.

What: Fundraisers approach individuals in their homes to solicit donations. This method relies heavily on interpersonal communication and engagement.

When: Typically during daytime hours when people are most likely to be home. Weekends might be particularly fruitful. Avoid late nights or very early mornings. For outdoor F2F, peak rush times are recommended.

Why:

Pros:

- Direct interaction can foster trust.
- Personal stories can be shared.
- Immediate feedback.

Cons:

- Labor-intensive.
- Can be perceived as intrusive.
- Weather-dependent.
- Safety concerns for fundraisers.

Door to Door Fundraising (F2F)



Where:

- Residential areas, communities, and neighborhoods where supporters or potential donors are likely to live.
- Malls
- Metro Stations
- Public Spaces with high influx of people

How:

1. Obtain necessary permissions from local authorities.
2. Train volunteers/employees on the cause, communication, and safety.
3. Set clear routes and territories to avoid overlap.
4. Carry identification and literature about the NGO.
5. Begin with a polite introduction, and if the individual is interested, delve into the cause.
6. Respectfully accept any refusal and thank everyone for their time.
7. After the activity, debrief and gather feedback for improvement.

Door to Door Fundraising (F2F)



HNI/UHNI Giving



Who: NGOs with a proven track record of impact, NGOs working on causes that resonate with the personal values or interests of HNIs/UHNIs (e.g., arts, education, health, conservation). It's also suited for NGOs that can offer exclusive experiences or recognition to these donors.

What: Fundraising that specifically targets individuals with significant personal wealth. This might involve personal pitches, exclusive events, or opportunities for these individuals to be closely involved in the cause.

When: Ongoing, but particularly during major NGO milestones, exclusive events, or when launching significant initiatives. Also, towards the end of the fiscal year when HNIs/UHNIs are looking for tax-saving opportunities.

Where:

- Personal meetings in upscale venues, exclusive social clubs, luxury events, private gatherings, or through introductions by mutual contacts.
- Digital spaces can include private email communications or platforms where HNIs/UHNIs congregate (Leap.club, forums, CoffeeMug, GrowthX, Alumni groups)

HNI/UHNI Giving



Why:

Pros: Large donations possible, potential for long-term philanthropic partnerships, can lead to other high-profile partnerships or opportunities through their network.

Cons: Requires personalized attention and relationship management, HNIs/UHNIs might want more say in how their funds are used, high competition as many NGOs target this group.

How:

1. Research: Identify potential HNI/UHNI donors whose values align with your cause. Know their story!
2. Networking: Engage in events or platforms where you can meet or be introduced to them.
3. Personalize: Tailor your pitch to their personal interests and show them the unique impact their contribution can make.
4. Engage: Offer them opportunities to see the impact firsthand, like field visits or direct interactions with beneficiaries.
5. Recognize: Acknowledge their contributions in meaningful ways – this could be in annual reports, donor walls, or naming opportunities.
6. Maintain: Cultivate the relationship, keeping them informed of impacts, and exploring further collaboration avenues

'Making A Difference': Zerodha's Nikhil Kamath, Biocon's Kiran Mazumdar Shaw Pledge Rs 50 Lakh to Charity

• Curated By: [Pritha Mallick](#) • [News18.com](#) • Last Updated: JULY 29, 2023, 21:29 IST • [New Delhi, India](#)



Zerodha founder Nikhil Kamath and Biocon chief Kiran Mazumdar-Shaw (Image: News18)

Kamath announced this philanthropic act on his podcast, "NK Talks: The Nikhil Kamath Show," where Mazumdar-Shaw was a guest

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Check-out Charity Partnerships



Who: NGOs of any size but particularly those with recognizable causes or brand names. Ideal for NGOs that can establish credibility with businesses and their customers.

What: A fundraising method where businesses ask their customers to make a small charitable donation during the checkout process.

When: Ideally during holiday seasons when shopping volume is high, or aligned with awareness months (e.g., breast cancer awareness month). Some businesses may run it year-round. Sometimes it may also be appended to the direct sale of a product. Example: ITC x Pratham

Where:

Physical retail stores

Restaurants

E-commerce websites

Travel apps

Fin(Tech) Product

Check-out Charity Partnerships



Why:

Pros:

Steady stream of funds, enhances NGO's visibility, low effort once set up.

Cons:

Relies on corporate partnerships, small individual donation amounts, needs strong connects.

How:

1. Identify businesses whose customers align with your cause.
2. Approach businesses with a proposal highlighting mutual benefits.
3. Work out logistical details (how donations will be collected, tracked, and transferred).
4. Promote the partnership to your audience and encourage them to shop at the partner business.
5. Provide regular feedback and appreciation to the business partner, showcasing the impact of the donations.

Check-out Charity Partnerships



FARE SUMMARY	
1 ADULT	
⊖ Base fare	₹21,400
👤 Adult (1 x ₹21,400)	₹21,400
Taxes and Surcharges	₹40,910
⊖ Discount	-₹4,000
🌱 GISKY	-₹4,000
 Donate ₹10 towards flood relief efforts in Himachal Pradesh.	<input type="checkbox"/>
Convenience Fee	₹799
Grand Total	₹59,109

Event-based Fundraising



Who: NGOs with a substantial volunteer or supporter base, those with public visibility, or NGOs with ties to celebrities or public figures. NGOs with experience in event organization or access to event management expertise.

What: Event-based fundraising involves hosting an event (gala, concert, sports event, dinner, auction, etc.) where attendees donate, either through tickets, purchases, sponsorships, or direct donations. The event can either be physically attended or virtual.

When:

1. When the NGO hits significant milestones (e.g., anniversary).
2. Around international days that align with the NGO's cause (e.g., World Environment Day for environmental NGOs).
3. Festive seasons or holidays when people are in a giving mood.
4. When there's availability of notable personalities or celebrities to attend or endorse the event.
5. Sports Events (IPL)
6. Giving Occasions

Where:

Physical Spaces: Halls, auditoriums, open grounds, hotels for gala events, sports facilities for sports events, etc.

Digital Spaces: Online platforms like Zoom or dedicated event platforms for virtual events, streaming platforms for concerts or performances.

Event-based Fundraising



Why:

Pros:

1. Engages supporters in an enjoyable activity.
2. Creates visibility and public awareness.
3. Can attract high net-worth donors.
4. Provides opportunities for networking.
5. Possibility of media coverage.

Cons:

1. Can be resource-intensive (time, money, people).
2. Risk of not breaking even if not enough funds are raised.
3. Requires detailed planning and execution.
4. External factors (like weather for outdoor events) can affect outcomes.

How:

1. Planning: Decide on the type of event, budget, and objectives.
2. Team Formation: Form a dedicated team or committee for event organization. Or onboard an event management partner.
3. Venue and Date: Choose a suitable venue and date considering audience convenience.
4. Promotion: Use social media, email newsletters, local media, and partner organizations to promote.
5. Partnerships: Seek sponsorships from corporates or tie-ups with celebrities.
6. Ticketing: Use online platforms for ticket sales and RSVPs.
7. Execution: Ensure smooth conduct on the event day with clear roles for volunteers/staff.
8. Post-Event: Share event highlights, and measure against objectives.

Event-based Fundraising

AR Rahman, Kamal and popular singers come together for 6-hr fundraiser concert

'Oru Kuralaai' features over 80 artistes and will be livestreamed on Facebook on Saturday.



CSR



Who:

- Established NGOs with clear impact metrics.
- NGOs working in sectors corporates prefer such as education, health, environment, skill development, tech, etc.
- NGOs that can provide detailed reports and ensure transparency in funds utilization.
- At least 3 years old.
- Aligned with SDGs.
- Scalability and Sustainability.
- Non controversial.

What: Corporates donate a part of their profits to NGOs as a part of their CSR mandate. This is typically aligned with the company's values or sectors they wish to impact. The aim is for the corporation to take responsibility for the company's effects on environmental and social wellbeing.

When:

- Ideally approached at the start of the fiscal year when corporate budgets are being allocated.
- During times of specific needs or crises, e.g., natural disasters, where a company wishes to contribute.
- Continuous engagement is necessary for long-term partnerships.

CSR



Why:

Pros:

- Potential for large funds.
- Long-term partnerships can be formed.
- Increases NGO's credibility and visibility.
- Access to other corporate resources (e.g., employee volunteering).

Cons:

- Requires extensive documentation and periodic reporting.
- The corporate partner might have a say in project specifics, potentially affecting NGO autonomy.
- Competitive, as many NGOs vie for limited CSR funds.

Where:

- Corporate boardrooms and meetings: Direct pitches and discussions.
- CSR summits and conferences: Networking and showcasing opportunities.
- Digital platforms for CSR partnerships: Websites, CSR specific platforms, and email campaigns.

How:

1. Build a Lead Database: Identify companies with CSR objectives aligned with the NGO's mission.
2. Proposal Preparation: Create a compelling proposal highlighting the NGO's impact, beneficiary stories, future plans, and clear metrics.
3. Direct Outreach: Approach CSR departments directly via emails, phone calls, or in-person meetings.
4. Networking: Attend CSR-focused events, seminars, and conferences.
5. Maintain Relationships: Once partnered, offer regular updates, ensure transparency, and work on building a strong, lasting relationship.

CSR



Indian firms' spending on corporate social responsibility (CSR) remained flat in 2021-22, a new analysis by primeinfobase.com based on companies' annual reports showed. The combined CSR expenditure by 1,205 listed companies that were required to spend under the law stood at ₹14,801 crore, similar to ₹14,763 crore in 2020-21. This was despite a 6% rise in the net profit benchmark used to decide how much a company should spend on CSR. However, to their credit, at an aggregate level, companies have already been spending more than they are mandated to since 2019-20, said Pranav Haldea, managing director, PRIME Database Group. To be sure, this doesn't mean all companies are doing so.

Grants



Who:

Established NGOs with demonstrable track records.

NGOs with specific projects addressing particular issues.

NGOs that can align with grant requirements and provide thorough documentation & reporting.

What:

Grants are non-repayable funds provided by a grant-making entity, often a foundation, trust, or government institution, to a non-profit, educational institution, business, or an individual. Typically, they're given to support specific projects or initiatives.

When:

Approach during specific grant application windows which vary for each grantor.

Some operate on a rolling basis, others have fixed dates.

Where: Grant directories (NGOBox, Candid), specific grantor websites, databases, workshops and seminars, academic institutes.

Grants



← → ↻ ngobox.org/grant_announcement_listing.php

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Filter Grants

Reset Search

Total Grants (77)

Post Added
Date From To Date To

Post Deadline
Date From To Date To

Select Thematic area

- Agriculture/ Food Security And Rural Development (2)
- Arts and culture (4)
- Climate Change Adaptation / Resiliency & DRRM (9)
- Drug Trafficking and Organized Crime (1)
- Education and Skill Development (8)
- Energy, Water & Environment (20)
- Governance (0)
- Health and Social Protection (28)

Select Grant Location
Select an Option

Select Grant Size (INR)
Select an Option

Featured Grants

Applications Invited for Labour Feminist Participatory Action Research 2023 – 2024



APWLD

Grant Amount: 13000 USD

Add to Google Calendar

📅 Deadline: 10 Sep. 2023

Share Shortlist

Applications Invited for the Tony Robbins Foundation Grant



The Tony Robbins Foundation

Add to Google Calendar

📅 Deadline: 31 Aug. 2023

Share Shortlist

Applications Invited for Interagency PSEA Community Outreach and Communication Fund



ICVA

Grant Amount: 20000 USD

Add to Google Calendar

Matching Donations



Who:

- NGOs that have partnerships or networks with corporations or larger donor entities. Ideal for NGOs that have a track record of transparency and those with established donor relationships.
- NGOs onboarded with platforms that facilitate matching donations

What: This fundraising approach involves a corporation or a major donor matching donations made by individual donors, often dollar-for-dollar. It's a way to incentivize more giving by amplifying the impact of individual donations.

When: Pursue during major fundraising campaigns, ex HundredHeroes, GivingTuesday, DaanUtsav, GFC, Ramadhan, etc

Why:

Pros: Doubles donation amounts, provides incentive for more donations, builds trust through corporate or major donor endorsement.

Cons: Requires a matching partner, might have limits on matching amounts, requires good documentation and tracking.

Where: Mostly third-party platform like Give, GlobalGiving, etc

How: Identify and approach potential corporate partners or major donors >> Set clear terms for the match (e.g., match ratio, max limit)
>> Promote the matching campaign widely >> Track and report on matched donations to ensure transparency and to acknowledge the matching partner.

Matching Donations



Double the Donation
matching gifts made easy

Product

Integrations

Database

Customers

Resources ▾

GET PRICING

GET A DEMO

COMPANY	MAXIMUM MATCH AMOUNT	LEARN MORE
General Electric	\$5,000	General Electric's matching gift program
Soros Fund Management	\$300,000	Soros' matching gift program
BP	\$5,000	BP's matching gift program
Gap Corporation	\$10,000	Gap's matching gift program
State Street Corporation	\$35,000	State Street Corporation's matching gift program
ExxonMobil	\$22,500	ExxonMobil's matching gift program
CarMax	\$10,000	CarMax's matching gift program
Johnson & Johnson	\$20,000	Johnson & Johnson's matching gift program
Choice Hotels	\$1,500	Choice Hotels' matching gift program
Microsoft	\$15,000	Microsoft's matching gift program

Employee Giving



Who: NGOs with corporate volunteering programs, NGOs with existing corporate partnerships.

What: This involves employees contributing a portion of their monthly salary to a cause. The company then transfers these collective donations to the chosen NGO/s. It can be a fixed amount or a percentage of the salary. It can also be a one-time event.

When: Best approached during Festive seasons

Where:

Within corporate spaces, during corporate training sessions, HR portals, internal newsletters, and digital platforms dedicated to payroll giving. Ex: DoubleTheDonation, Give, Benevity, YourCause

Employee Giving



Why:

Pros: Easy stream of funds, builds long-term relationships, and can be integrated with corporate matching.

Cons: Might not be as large as other corporate donations, requires maintaining good relationships with corporates, can be seasonal.

How:

1. Identify companies with a culture of giving or CSR initiatives.
2. Approach HR or CSR departments with a proposal.
3. Present clear benefits for employees (tax benefits, recognition, etc.).
4. Provide material like flyers, videos, or testimonials for internal company promotions.
5. Facilitate easy donation mechanisms, possibly integrating with company payroll systems.
6. Recognize and appreciate contributors regularly.

Employee Giving



\$1,300

total raised

63

donors

0

monthly donors

3

months

Challenge

The challenges the children at Kalam Public School face include limited access to proper seating and workspace, insufficient learning materials, a lack of play equipment, and the additional obstacles posed by their underprivileged backgrounds. The generous donations and support will help alleviate these obstacles and create a more conducive and nurturing environment for their education and well-being.

Solution

The Characterisation team at Qualcomm Technologies International, Ltd (QTIL) is organizing three fundraising events for underprivileged children at Kalam Public School in Karnataka, India. They include a 60 KM sponsored walk, a bake sale, and a Mario Kart competition for QTIL's Cambridge office employees. Donations will sponsor Single Chairs with Desks, Writing Pads (LCD - 8.5 Size), Tricycle Toys (Without Pedals and With Pedals), See Saw Slide and Swing Combo, Slide, and Swing.

Legacy Giving



Who: NGOs with long-standing reputations, NGOs with a long-term vision or projects that extend beyond immediate timelines, NGOs that have a strong engagement program with their donors (including volunteering).

What:

- Funds or assets are usually received after the donor's death.
- Can be a fixed amount, a percentage of an estate, or specific assets.
- It's a commitment made by the donor, often without an immediate financial outlay.

When: At the end of donor cycle: Awareness >> Interest >> Desire >> Donation >> Delight >> Recurring Support >> Delight >> Upselling >> Personalised Interactions >> Relationship Building >> Advisory >> Legacy Giving

Where: Personal meetings, legacy giving seminars, donor appreciation events. Digital spaces can include dedicated webpages on the NGO's site explaining the process and benefits of legacy giving. Platform example: LivingMyPromise

Legacy Giving



Why:

Pros:

1. Provides a sustained source of funds.
2. Fosters deeper donor engagement and commitment.
3. Often results in larger donations than the donor might give during their lifetime.

Cons:

1. Funds may not be available immediately and might come after many years.
2. Can be sensitive to discuss as it pertains to the donor's demise.
3. Requires proper legal understanding to ensure the bequest is valid and actionable.

How:

1. Educate and Train Staff: Ensure that key members are knowledgeable about legacy giving.
2. Promotion: Create brochures and dedicate sections on the website for legacy giving. Host seminars or webinars.
3. Engage Donors: Speak to longstanding supporters about the possibility and benefits of legacy gifts.
4. Provide Guidance: Offer donors clear steps and legal guidelines (and advisory) for including the NGO in their will.
5. Recognize and Appreciate: Consider recognizing donors who've committed to legacy gifts (e.g., through a legacy society).
6. Maintain Relationships: Keep families and executors informed and maintain good relationships, ensuring that when the time comes, funds are received without complications.

Legacy Giving



#LivingMyPromise
reimagining Indian philanthropy

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[Contact](#)

PROMISE NOW

MEET OUR PROMISORS

DEEPAK CHOPRA



NARESH MULEY



SAMIR M A



Endowment Funds



Who: Endowments are funds that NGOs, universities, and other institutions receive or accumulate, where the principal amount is typically kept intact and only the interest or earnings are used for the institution's operations or specific purposes.

- Established NGOs with a long-term vision.
- Institutions such as universities, museums, hospitals.
- NGOs that can assure donors about their longevity and impact over a longer time frame.

What:

- Intended to provide long-term support.
- The principal amount is usually not spent but invested, and the returns (interest, dividends) support the NGO's activities.
- Donations to endowments can come from various sources, not just legacies. For example, a large one-time donation can be used to start or add to an endowment.
- Often has stipulations on how earnings can be spent, e.g., scholarships, research, specific projects.
- It's possible for a Legacy Gift to be directed towards an NGO's endowment fund.

When:

- When an NGO has a track record of success and can assure donors of its long-term viability.
- Ideally, when economic conditions are favorable, making the investment aspect attractive to donors.
- During major anniversaries or milestones of the NGO (or the donors) when receptivity is higher.

Endowment Funds



Why:

Pros:

- Provides a stable and continuous source of income.
- Enhances NGO's credibility and long-term viability.
- Can lead to large donations since donors know their money will be used perpetually.

Cons:

- Can be challenging to set up due to the requirement of significant initial capital.
- Requires skilled financial management.
- Might not be suitable for NGOs needing immediate and flexible access to funds.

Where:

- Financial institutions and banks which offer endowment management services.
- Investment events where potential large donors gather.
- Digital platforms which focus on long-term charitable giving or legacy donations.
- Through direct solicitation with high net worth individuals interested in legacy giving.

How:

1. Clearly define the purpose and terms of the endowment fund.
2. Work with financial advisors or professionals to set up the fund and determine the investment strategy.
3. Launch a campaign targeting potential major donors, emphasizing the long-term impact of their contributions.
4. Regularly update donors on the performance of the fund and its impact.
5. Ensure legal compliance and transparency in financial management.

Endowment Funds



WILSON SOCIETY

ABOUT THE WILSON SOCIETY

MEMBERSHIP

GIFT PLANNING

CONTACT US

MEMBERS

IN MEMORIAM

Honor Name
Margaret M. Cassick*
Mary Jane Gray*
Patricia L. Schreib*
Dr. Frederick H. Tenney `53 (PhD), P`76* and Dr. Lillian Tenney `49M (MD), `52M (Res), P`76*
Lisbet Thew `45E* and Warren Thew `49E*
Elizabeth J. Thomson*
Anonymous 33* and Anonymous `45, `48 (MS)*
Anonymous `56*
Anonymous `46*
Anonymous `62E*
Anonymous `55*



Next Masterclass: Best Practices in Fundraising



Website: bsif.codeblue.io

Email: bsif@bhumi.ngo

Contact: +91 9070012536

Thank You!