

Using social intelligence to influence giving

Session Presenter:

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Session Overview

Using social intelligence to influence giving

**The Community's
View via
Social Intelligence**

**Example:
UK Vital Signs**



**The Donor's View via
Philanthropy Advice**

**Example: UK's
Philanthropy
Advising Framework**

GROUP DISCUSSION: Exploring the requirements of the two stakeholders and their relationship in order to influence effective giving for thriving communities.

Using social intelligence to influence giving

Creating Social Intelligence

Overview of UK Vital Signs

Using social intelligence to influence giving

Defining Social Intelligence in a Community Foundation Context

- **The ability to negotiate complex social relationships and environments**, eg. understanding and articulating the complexities of communities, the issues they face, their needs and the aspirations they have – and their interconnectedness and interdependency;
- **Ability to get along well with others and to get them to co-operate with you and form rewarding relationships**, eg. via community relations, consultations and relationship building;
- **A system through which information about a particular entity is collected for the benefit of another through the use of more than one inter-related source**, eg. gathering national and local data on communities.

Using social intelligence to influence giving: Vital Signs Globally



UK Vital Signs: Aims

UK Vital Signs aims to guide and inspire giving by community foundation locality to ensure thoughtful and strategic community philanthropy, sharing local voices and information, undertaken in collaboration with a number of Community Foundations in the UK.

UK Vital Signs is based on Vital Signs Canada which supports local action on social problems and as a vehicle for raising the profile and influence of the Canadian Community Foundation movement.

Please visit www.vitalsignscanada.ca for more details.

Berkshire's

VitalSigns®

www.berkshirecf.org/vitalsigns



Berkshire's Vital Signs – Update 2014

Berkshire's Vital Signs report is a community 'check-up' that measures the quality of life in local communities and identifies our county's priorities, needs and opportunities for action.

Berkshire Community Foundation launched its Vital Signs report on 1 October 2013, which reported on how we think our county is doing in relation to 12 key themes. Grades were used to indicate priorities for action, based partly on how we were performing in relation to the rest of the UK but also on our assessment of the local situation.

Vital Signs Theme	Grade
Work and local economy	B
Getting started	C
The gap between rich and poor	D
Housing and homelessness	D
Safety and crime	D
Learning	C
Arts and culture	B
Strong communities	B
Environment	D
Health and wellbeing	B
Civil Society Organisations	D
Young People	D

The low grades (D) indicate that we must take action as soon as possible.

Berkshire is generally perceived as an affluent county. However, Vital Signs concluded that although there is a good overall quality of life, there is also a stark inequality across Berkshire. This has enabled us to identify the priority issues that present the most significant challenges and opportunities for change. We focus our charitable efforts for maximum impact and use our local knowledge to work with donors to encourage "community philanthropy" – the use of wealth to address local social issues.

Our intention is that Vital Signs will continue to inform the development of effective community philanthropy in Berkshire for years to come. This 2014 update focuses on three of the key areas which have emerged as real priorities in Berkshire:

- the gap between rich and poor,
- support for civil society organisations,
- young people.

£730,643
the total of Berkshire
Community Foundation
grants in 2013-14



Berkshire's Vital Signs report can be downloaded in full from our website www.berkshirecf.org/vitalsigns

UK Vital Signs: What is it?

- **A giving guide and a community philanthropy report** by CF locality;
- **It reports by a set 10 social themes** with additional extras for a CF to add;
- **It contains statistics** from a national database reported by theme & area;
- **It contains summaries of an area** via reports & surveys;
- **It contains community voices** from the results of community engagement activities & consultations on issues, needs , assets and aspirations;
- **It provides guidance to local philanthropists, Philanthropy Fellows and donors** on how to prioritise their giving, refresh their grant criteria or start supporting communities;
- **It is published on 1 October each year** with UK & Canadian participants either as a full or 'mini' report.

Annual Cost: £3,500 - £25,000 per community foundation, dependant on aims & resources.

VitalSigns®

Welcome to the first Vital Signs report for the Hampshire and Isle of Wight, an initiative that captures the attention of our key audiences in a unique way. Vital Signs is a community philanthropy guide from your local Community Foundation that measures the vitality of our communities and identifies significant trends in a range of areas critical to local quality of life. It involves working with our neighbourhoods in new kinds of discussions about the issues facing our communities, allowing us to create a clearer picture and direct our attention and resources to targeted areas.

At a top level, we have found much to celebrate in our assessment of Hampshire and the Isle of Wight. People are generally satisfied, employed and have a long life expectancy. However, when we drill down further we find some of the most disadvantaged people in the country. The inequalities in our county mask particular challenges some communities face.

To read the full report visit
<http://www.hantscf.org.uk/community/vital-signs.aspx>

Tell us what you think
 (see back page)

Please read it, share it and let us know what you think



Our priority for Hampshire and the Isle of Wight is targeting support to the areas of greatest need.

How is Hampshire and the Isle of Wight doing?

We've produced this report to show how we think Hampshire and the Isle of Wight is doing in relation to 12 key themes.

Tell us what you think (see back page)

- Work
- Local economy
- Fairness
- Housing and homelessness
- Strong communities
- Safety
- Learning
- Arts, culture and heritage
- Environment
- Healthy living
- Rural
- Transport

The grades indicate priorities for action. They're based partly on how we are doing in relation to the rest of the UK, and also on our assessment of the local situation. What the grades mean...

- A** Everything is great. Let's keep things that way!
- B** Things are going well, but we can make them better
- C** The situation is OK
- D** Things aren't going very well. We should take action as soon as possible
- E** Things are going very badly. We must act now!

UK Vital Signs: Opportunities & Benefits

1. **Increase effectiveness of grant-making**, using community intelligence;
2. **Better inform donors** on needs, issues & aspirations for impactful giving;
3. **Provide a tool for Philanthropy Fellows (UK)** for education and debate;
4. **Provide community engagement opportunities** to improve outreach & links;
5. **Provide a new business tool** to demonstrate the community as a cause;
6. **Demonstrate a CF's credibility** as a community knowledge hub;
7. **Provide profile raising opportunities** for debate & comment;
8. **Enable better and more informed connections** across communities;
9. **Use as a lobbying & campaigning tool**, as required, backed by Vital Signs;
10. **Designed & piloted by CFs**, offering a toolkit to deliver Vital Signs.

AGEING

Like every region in England, Lancashire's population is ageing. As a starting point Lancashire already has a larger proportion of older people (18%) than the national average (16.5%) and this percentage is only going to increase in future years. For example, Lancashire County Council predicts the number of individuals in the county aged over 65 will increase by 58% in the next twenty years, whilst the number of people aged over 85 is projected to increase by 145% – above the projections for the national (136%) and regional (131%) increases.

“I am now of an age where I feel I might need additional care as I get older, I would like the peace of mind to know that such care would be available.”

Lancashire Resident

With the large-scale projected increases in the number of older people, Lancashire will see an obvious strain on key services - particularly as the prevalence of diseases such as dementia naturally increases. For example The Mental Health Observatory estimates the number of people over 65 in Lancashire with dementia will increase by 49% by 2025, noticeably above the estimated national increase of a 43% - with the increase being as high as 64% in Ribble Valley.



“People are very easily isolated and don't seem to get the help they need.”

Lancashire Resident

HOW TO GIVE IN THIS AREA

Based on these findings you may want to consider giving in some of the following ways to improve older people's health in Lancashire:

- Funding and volunteering with older person charities and community groups, particularly those specialising in dementia, who are working with and supporting local older people;
- Supporting older people with long-term illnesses via locally based charities and community groups;
- Tackling older people's isolation and loneliness by working with specialist partners in communities, especially in Ribble Valley and Wyre.

These are just a few ideas on the ways in which you can give to contribute to supporting the ageing population of Lancashire. If you want to make a difference to communities in this area, please talk to us about researching, developing, planning and delivering your giving with you to achieve results.

CASE STUDY

Skelmersdale Action for Youth

Skelmersdale Action for Youth is a community group made up of young people aged 12-25 who campaign to improve the life of people within their local area. Following a grant from the Community Foundation for Lancashire they were able to run an intergenerational project which brought together people from different backgrounds from across Lancashire to show respect to those who had lost their lives in armed conflict. This gave the veterans involved a chance to share their experiences and memories with a younger generation and increase intergenerational understanding and respect.



Using social intelligence to influence giving: Vital Signs Benefits



Source: Community Foundations of Canada, 2013

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Using Social Intelligence

*Overview of UK Philanthropy
Advising Framework*

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Defining Philanthropy Advice

- **Advising within our Community Foundation role of philanthropy facilitation**, alongside our roles as grant-makers/social investors and community leaders;
- **Advice elements can include:** Creating grant criteria; social impact investment advice; providing evaluation, monitoring and impact assessment; finding projects or organisations for philanthropists to support and learn about; developing & testing a Theory of Change; endowment building guidance; information on tax implications of donations, or the legal aspects.

Examples of Leading Advising: Rockefeller

“The diverse staff of 40 at Rockefeller Philanthropy Advisors is led by experienced grantmakers who bring a significant depth of knowledge across multiple issue areas.

RPA’s team-oriented approach stresses confidentiality, effectiveness and customization. Each client works with a team of advisors whose expertise directly matches their interests and needs. Donors find this approach to be a far less time-intensive and more cost-effective alternative to hiring full-time staff.”

Examples of Leading Advising: AiP

“The typical AiP member is an entrepreneur-minded professional advisor with a deep passion and commitment to collaborate with like minded professionals from all over the world.

He or She has been in business for at least 15 years, and has a strong desire to build and/or improve upon the deliverables he/she is currently offering clients, particularly in the area of Philanthropic Planning.

The AiP member is charitable themselves, active in Non Profit organizations in their own community, and is very generous with their time, talents, and treasures. **He/She has already received years of specialized training in tax, legal, financial, fiduciary, or Non-Profit Leadership...”**

Developing Requirements in the UK movement (1)

Abilities, Knowledge & Skills

- Investment knowledge
- Knowledge of good community groups
- Ability to listen
- Training
- Passion & Enthusiasm
- Ability to meet the donor where they are and take them on a journey
- Be non-judgemental

“The ability to be flexible whilst the relationship develops is crucial.”

Developing Requirements in the UK movement (2)

Tools

- Time spent with philanthropists
- Strategic planning with them
- Monitoring social impact
- Project visits

*“Knowing the groups and local issues is one thing.
Knowing the most effective solutions is another...”*

Developing Requirements in the UK movement (3)

The Philanthropy Advising Framework

- Testing CF competencies, experience and skills
- Piloted via Recruitment & Induction, Appraisals & Reviews or Strategic Development & Implementation
- 14 out of 46 Community Foundations participating in 2015/16
- Created by Community Foundations with CASS Business School (City of London University)
- Described as “ground-breaking” for the UK

What does success look like in advising?

Top Three Requirements:

- Demonstrating social impact
- Communicating effectively
- Measuring results

*“Being recognised as a community focused organisation, **where genuine philanthropic conscious people know our value.**”*

*“CFs need to seek/gain the pole position in the market **as 'the' place to go** for the latest thinking on social impact and social investment.”*

*“To complete the goal, **CF staff need to gain more experience** with the skills of working with ...donors, coaching, and introducing donors to developing their own giving strategy.”*

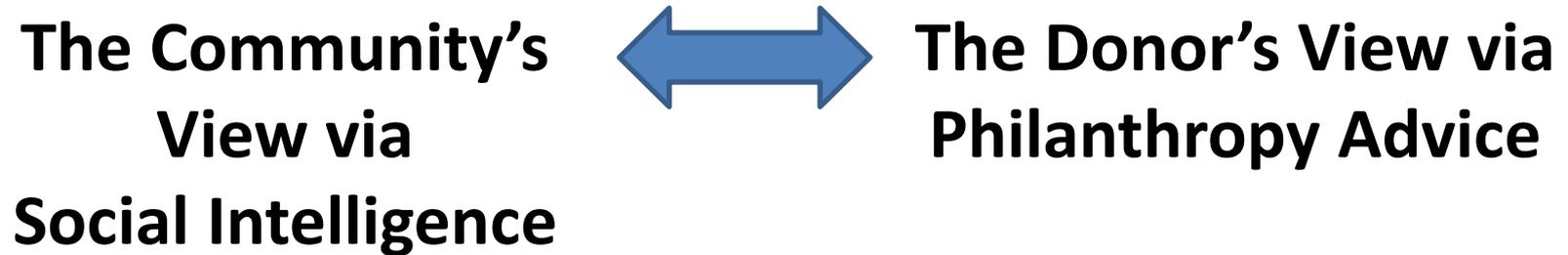
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Connecting the Donor's View with the Community's View

Group Discussion

Exploring the Connection: What are the Requirements & the Relationship

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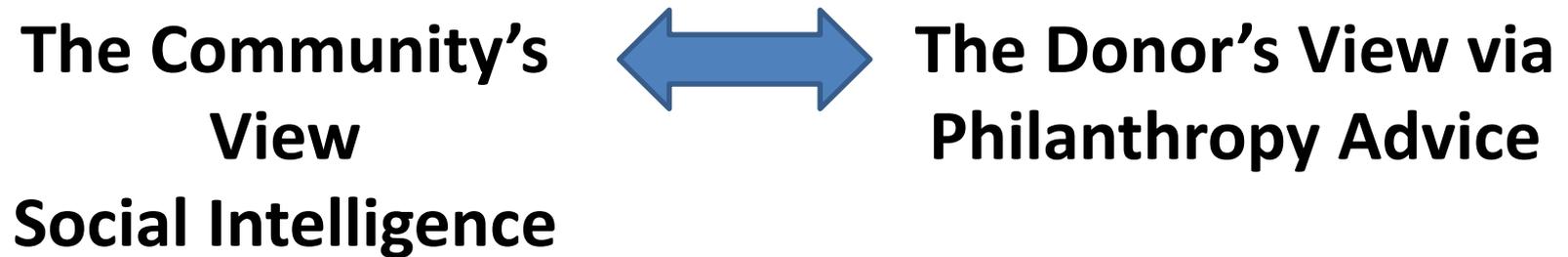


DISCUSSION

What are the requirements of the two stakeholders and their relationship in order to influence effective giving?

Exploring the Connection: What happens when there is a mismatch?

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DISCUSSION

What happens when donor interests don't match community priorities?

Does it matter if they don't match?

Exploring the Connection: Matching Interests or Meeting Needs

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**The Community's
View
Social Intelligence**



**The Donor's View via
Philanthropy Advice**

Tools:

**Unrestricted funds, eg.
Vital Funds**

**Themed funding
programmes**

Tools:

**Donor education
programmes, eg.
Philanthropy Fellowship
Donor briefings**

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New findings to be shared at:

Community Foundations of Canada Conference 2015,
7 – 9 May, Calgary

UK Community Foundations Conference 2015,
23 – 25 September, Belfast

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