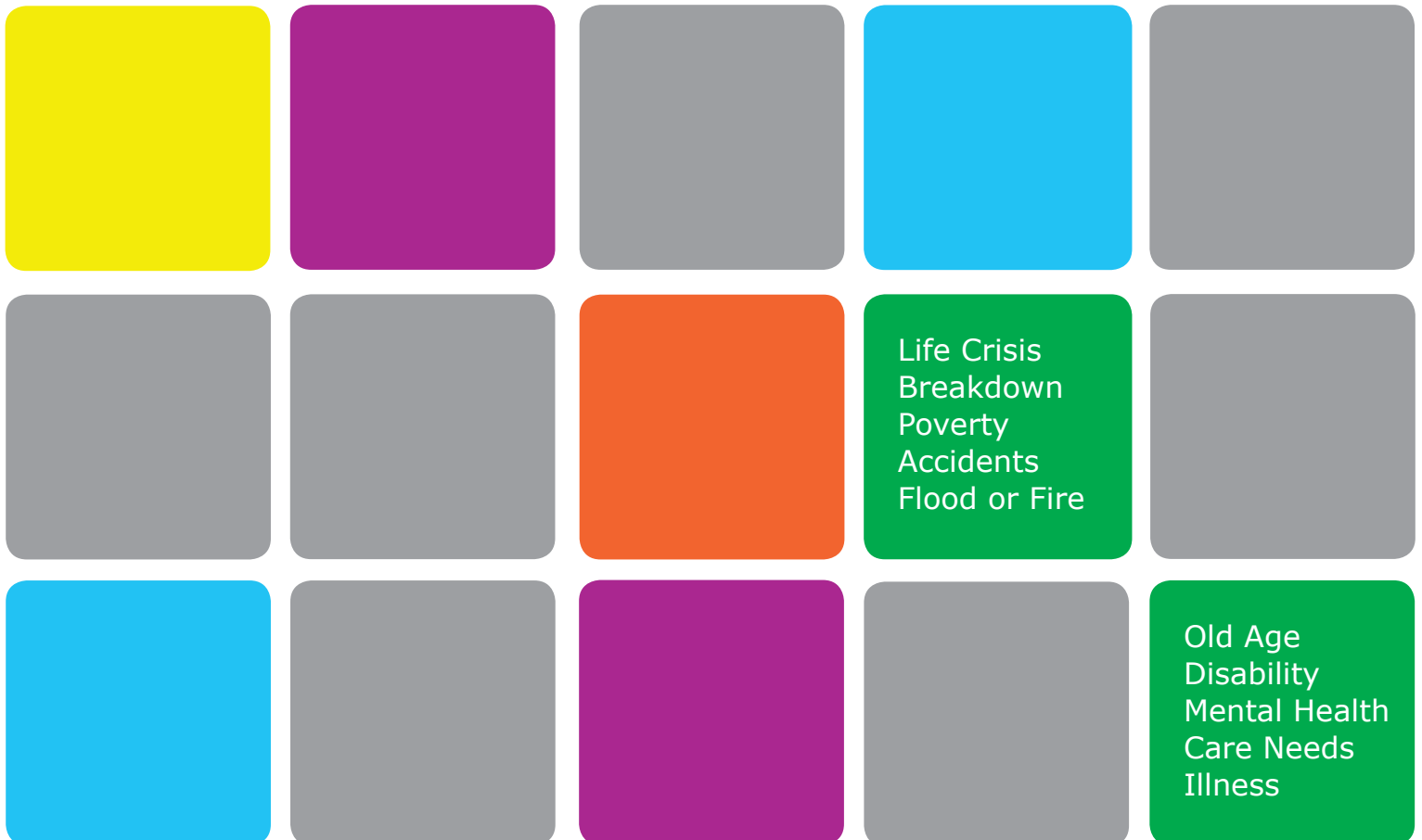


benevolence today **help for people in need**

FINAL REPORT

Lessons
Outcomes
Analysis

2007-2010



A Quick Introduction to Benevolent Charities

'Benevolent charities' is a term used for grant-giving organisations which exist to help people who have fallen on hard times, due to old age, disability, accidents, long term health conditions, illness, life crisis, natural disasters or other reasons.

Many such organisations were founded in Victorian times, some later, and their origins vary. Some were set up by local communities, some by unions, some by groups of people working together, some by industrialists or philanthropists, some by business communities.

There are approx. 3000 benevolent, grant-giving charities in the UK. Very few are general funds, which can help anyone who faces hardship. A few specialise in helping children or older people. Many help people in a specific locality, or with a certain religious background.

A large number of benevolent charities exists to help virtual communities of people who have worked or are working in certain professions, jobs, industries or trades. These charities are called occupational benevolent funds. They could also be described as a form of industry social funds, which are independent charities. Employers might donate to them, as will employees and professionals working in different fields. Such donations are not a prerequisite for getting help from such a fund though.

With beneficiaries, we mean the people we help.

With grant-recipients, we mean the people given direct financial support.

All data published in this report is the result of original research carried out by Benevolence Today between 2007 and 2010.

Benevolence Today is a coalition working in cooperation with the Association of Charity Officers (ACO). Registered Charity No 1118605. A Company Limited by Guarantee No 6113479.

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Text © Benevolence Today

Publication Date: London 2010

Design & Layout: S Kendler / Benevolence Today
Source Images/Photos © www.canstockphoto.com
Web Design Benevolence Today: Jon Worth



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Benevolence Today and Tomorrow

There are many, often little known benevolent charities which help different, often work-related communities. Some can help dozens of people a year, some can help thousands of people a year. Together, the sector helps tens of thousands of people in need in the UK and abroad each year. What these charities share is a focus on the individual, on helping people in need, in a non-judgemental, supportive way.

The benevolent sector can benefit significantly from collaboration and partnership working. It has the ability to increase its capacity to help more people. This potential, however, is balanced by major challenges in the sector around internal capacity-building, governance and best practice development.

Different initiatives exist to make benevolent charities' capacity more accessible to referrers and intermediaries who work with people in need. *Turn2us*, the DSC's *Grants for Individuals* book and database and *funderfinder* are the leading referral-platforms. Benevolence Today has liaised with all of them, working specifically closely with Turn2us.

The Benevolence Today coalition and campaign was a unique holistic project which brought together a group of forward-looking benevolent charities in a joint project to raise awareness and improve the accessibility of their services.

Reaching beyond its core mission, Benevolence Today allowed the benevolent sector to explore its position, structure stakeholder maps, and identify needs for capacity-building in the sector without which future awareness work and service development is unlikely to be effective.

Some of the innovation work trialled by Benevolence Today partners also opens questions about the overall role of occupational benevolent charities.

Can a new holistic model of benevolent charities, in which they provide a variety of services, in cooperation with other organisations, be developed? More importantly, can this become a new blueprint for corporate social responsibility programmes which employers in different industries and trades could be motivated to invest in?

Can occupational benevolent charities reinvent themselves to become high-profile partners to companies in their respective fields, providing an essential social function to different business communities in looking after their own?

Lessons from the Benevolence Today project will allow partners to analyse which future strategies are likely to succeed, which are not. Partners have previously unavailable benchmarking data and documentation at hand, which can guide their future work and the work of the wider benevolent sector.

Most importantly, our partner charities have been able to help more people than before this campaign started. They also have more different referral channels open to them, which will allow them to support yet more people in the future.

Susanne Kendler

Campaign Lead, Benevolence Today 2007-2010



Chair's Introduction

Benevolence Today has been an exciting collaborative project, which my own charity, the BBF, has been part of. Working in partnership with others in this coalition has been a big learning experience for us all.

Much of the service innovation the BBF as a charity is undertaking at the moment has been shaped significantly by the strategic thinking at the core of Benevolence Today and lessons from it.

As Chair of Benevolence Today, I would like to thank the other partners in the coalition for their contribution to the project over time, for their time and readiness to share experiences. I would further like to thank the Association of Charity Officers for hosting Benevolence Today as an organisation, and Susanne Kendler for heading up the campaign, being our strategist and spokesperson and building new relationships and partnerships for the benevolent sector, which will be most useful in the future.

This report summarizes the work carried out on behalf of the Benevolence Today coalition, and outlines the key results, lessons and findings from this work.

Most importantly, benevolent charities have been introduced to a significant number of advisers and front-line client-facing staff across the charitable, care and health sectors, which we had little connection with before.

Benevolence Today partner charities come away from the Benevolence Today project with the satisfaction that our group, if not each individual charity in it, has been helping significantly more people than before starting to work together. Figures show that the group altogether helped over 44,000 individuals in 2009.

Sector-relevant thinking has been developed and we have a new understanding how our benevolent charities can work more effectively with other non-grant-giving charities, public sector agencies and others who provide services for people in need.

We are sure this will enhance the role of benevolent charities in playing their part in helping those in need in the society we live in.

Fred Payne

Chief Executive, BBF

Chair Benevolence Today, 2007-2010

Deputy Chair & Trustee, ACO 2004-2009



Executive Summary

By the end of 2009 Benevolence Today partner charities have helped 20% more people than when they started working together in 2007.

Benevolence Today has been the title of a collaborative awareness and relationship development campaign by a coalition of like-minded benevolent charities between 2007 and 2010.

The project started from the premise that benevolent charities with spare funding capacity could help more people in need. Their work was often limited by the number of people applying for help, rather than funds running out. Since their beneficiary groups vary, no competition was to be expected when working with like-minded charities. Tackling the issue of awareness-raising together was identified as a cost-effective way forward to be explored.

Activities

Over a period of three years Benevolence Today

- conducted internal research to identify the structural basis from which benevolent charities operate, looking into what limits, threats and opportunities there are to their actual capacity to support more beneficiaries
- analyzed the services of its coalition partners in order to identify which services were provided, where capacity was, and how this matched need in society today
- marketed benevolent charities proactively to organisations and individuals who are in a position to signpost people in need to them
- communicated with different target audiences to raise awareness of benevolent charities
- engaged in a dialogue with experienced advisers to learn what actual barriers exist for people to find and access help from benevolent charities
- explored innovative models of service delivery, which enable the benevolent sector to meet needs and build its internal capacity to meet increasing and changing need.

Outcomes

Promotion and Awareness

Benevolence Today charities have widened the range of 3rd party referrers and intermediaries who signpost people in need to their services.

- Benevolence Today proactively distributed information about what benevolent charities are and how they can be found to key audiences, such as benefits advisers and client-facing charity, health and disability workers. In addition, one-to-one meetings with such organisations and presentations given at events and meetings introduced a variety of service-delivery charities to the work of grant-giving charities.
- Benevolence Today's *Working in Partnership* brochure was produced in cooperation with experts in the DWP's Local Service, Council & Care, Citizens Advice and the umbrella body for Occupational Therapists. The brochure introduced benevolent charities to potential referral partners, translated 'benevolence jargon' into plain English, and identified and covered frequently asked questions about eligibility criteria and about how benevolent grants relate to state benefits.
- Over 2,000 hard copies of the *Working in Partnership* brochure were distributed to charities UK-wide, an additional 4,000 copies have been downloaded from the Benevolence Today website in 14 months, following publication in November 2008.
- The Benevolence Today website was used 45,000 times by visitors to find practical information about benevolent charities, about how they work, who they can help, and how to find individual funds. Web traffic analysis strongly indicates a very targeted, professional audience for the website, which was attracted as a direct result of other integrated marketing activities, and in 10% of visits visitors forwarded results they found to a colleague or contact.
- Benevolence Today-driven stories about benevolent charities in national media outlets and targeted charity- and care-newsletters reached an estimated PR audience of over 3 million readers.



Practical Referral Solutions

- A *Directory* of Benevolence Today partner charities has been downloaded electronically by 2,100 individuals between June 2009 and February 2010, as part of a pilot awareness project with the NHS-internal Patient Advice and Liaison Service (PALS).
- 3,500 visitors to the Benevolence Today website sought out partner charities through the on-site coalition partner directory.
- Benevolence Today actively worked with its partner charity Turn2us during its start-up-phase, ensuring the search categories on its online directory of benevolent and grant-giving charities were fit to make them as accessible as possible. As a result, over 65% of Benevolence Today partner charities now get referrals through Turn2us.

Benevolence Today has helped improve signposting between charities, grant-givers, benefit agencies and health- and social care so people in need find help more easily.

Public Affairs

- Benevolence Today engaged in policy consultations on behalf of its partners, carried out targeted public affairs work and built key relationships to further the interests of the coalition partners where this was necessary. It established a role for and represented partners interests on the Department of Work and Pensions' Pensioners, Disability and Carers Service (PDCS) Advisory Forum.
- Benevolence Today identified people of working age with health and/or social care needs as the main growing beneficiary group among its coalition partners. It ran two roundtables to identify issues in health & social care funding and service provision which will have an impact on the long-term strategy of benevolent charities in this growth area and made findings available to partners.

Sustainability and Modelling

- Benevolence Today produced stakeholder maps, tested communication strategies and provided feedback on the effectiveness of different communication approaches to its funders.
- Benevolence Today's internal research produced pioneering sector-internal benchmarking data which have been shared with all funding partners to help them develop their forward looking strategies.
- Benevolence Today enabled partners with an interest in sharing service innovation models to do so and informally worked as a platform to exchange experiences.

Benevolence Today partners have access to sound benchmarking data and new models for how their services can meet needs.

5 Key Lessons

1. Benevolent charities are increasingly helping where help is needed most. Adults of working age in times of crisis are a main growth area for support needed.
2. Raising Awareness through informed intermediaries is effective. Promotion needs to be targeted, and benevolent charities need to build risk management into their approach to awareness campaigns.
3. The main challenge the benevolent sector faces is capacity-building. With increased pressure on public finances, and with the gap between rich and poor widening, the importance of the sector is likely to increase, but it needs to meet this need with sustainable, targeted solutions.
4. Any outreach work is more effective for benevolent charities with a wider footprint in society. More people will be eligible for their help, and awareness campaigns bring a greater percentage of new beneficiaries to larger or more general funds than to niche funds. While focusing awareness efforts on their closer community will be most effective for niche-market benevolent funds, they should not isolate themselves and participate in capacity building and policy work with wider-reaching funds.
5. Benevolence Today's work is a first step towards mapping the benevolent sector, its capacity, its stakeholder groups, communication potential and the policy world around it in a new, holistic way. Benevolence Today has been successful in opening doors for the benevolent sector to find a new, recognised position as a partner to work with. This could bring the benevolent sector closer to the charity and social sectors and away from its relative position of isolation.



Benevolence Today – Concept and Strategy

History

Benevolence Today followed in the tracks of a previous pilot in the benevolent sector, named Joblinks. Joblinks was an online directory of 200 benevolent charities, which was jointly funded by members of the Occupational Benevolent Fund Alliance (OBFA) and ran until 2007.

The lessons from the project had been

- 3rd party organisations were interested in such a useful directory.
- Any future collaborative work needed actual staff resource to proactively develop relationships with potential referrers.

As a direct result, a new group of charities – 32 initially – came together in late 2006 to fund a new project, which was titled 'Benevolence Today' when it formally started operations in February 2007.

Set-up

The Benevolence Today coalition's work has been administered by the umbrella organisation for benevolent and care charities in the UK, the Association of Charity Officers (ACO) in Potters Bar. Benevolence Today had its own office space in central London to allow the coalition to meet with other organisations more easily.

The joint work of the Benevolence Today coalition was funded in two funding rounds from the participating charities themselves, which pooled contributions into a project fund, which has funded all staff, office, administration and marketing costs of the campaign. Initially planned for a 12-18 months period, the project was extended through a 2nd funding round to run for 3 years when it became clear to partners that the task ahead was much more complex than initially envisaged.

The coalition has been run by a sole member of staff, who led the project, liaised with all partners, managed reporting of the work to internal and external stakeholders, devised communications and partnership strategies and worked closely with the campaign's Chair and a Steering Group to adjust strategy to lessons learnt over time.

Brand

The coalition's name represented its joint campaign mission. The purpose of joint working was to make benevolent grant-giving and support accessible to more people in need than in the past.

Hence Benevolence Today.

The visual brand identity of Benevolence Today, which is based on variable multi-coloured blocks, represents the diversity of the communities supported by the coalition charities.

The concept behind the block squares is to represent building blocks, which provide support for people to rebuild their lives, to hold on to, to be flexibly used depending on each individual's situation.

Strategic Development

In internal research in 2007 Benevolence Today partners named the following key challenges to raising awareness of their charities' work:

- lack of resource in their own organisations, in terms of staff, IT and marketing capacity
- the Data Protection Act which had made it more difficult to communicate with individuals in their communities directly as they had done in the past



- an ebb-and-flow pattern in their own marketing impact, with spikes of interest following each advertisement or small media story, and no applications in the time between PR efforts

These three factors shaped the strategy of Benevolence Today's strategy. It aimed

- to raise awareness of partners' services in 3rd party organisations which could act as a channel to reach end-users, i.e. individuals in need which benevolent charities found hard to reach directly
- to not only create a series of peaks of interest in the partners through PR stories and advertising, but to build longer-term structural relationships with 3rd party organisations instead, with the vision to ensure long-term awareness of benevolence and a new position of benevolent charities in the support system available to people in need in the UK overall
- to act as a joint resource for partner charities, using cost-effective web-based and open-source IT platforms to add virtual capacity to a small office.

The Benevolence Today Communication Model

Benevolence Today engaged in PR and marketing for promotion and awareness purposes. It engaged in public affairs work and focused stakeholder-relationship development to add long-term structural depth and sustainable impact to its work.

Benevolence Today was built around a channel strategy on the basis of a 'business-to-business' model of communication. This aimed to reach people in need through intermediaries who they were more likely to go to for help than grant-giving charities. These intermediaries can give people advice and encourage them to ask for financial and other help, a step many are reluctant to take on their own.

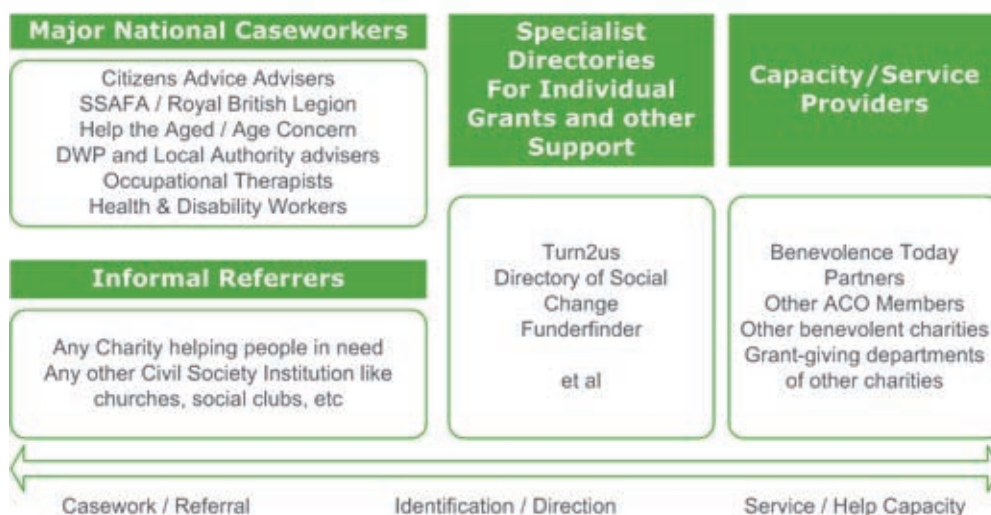
At the same time, such a referral approach is seen as adding a useful 'filtering' function. As many benevolent charities have relatively limited internal capacity to deal with high call and application volumes, enabling third parties to make informed referrals to benevolent funds, was and still is seen as a key strategy.

Given restricted resources, Benevolence Today focused its work on key national referral partners with a strong expertise in casework and individual support.

Some awareness work was also targeted at what the model below calls 'informal referrers', i.e. organisations which do not directly look after individuals, but may in the course of their work come across cases they may refer to benevolent charities if they build a low-level awareness of such help.

To identify individual funds, Benevolence Today marketed its coalition partners and their contact details widely, but also signposted referrers to partner Turn2us as a wider search engine to identify which funds can help in which cases.

SERVICE REFERRAL PROCESS





Benevolence Today coalition partners support...

- Actors
- Architects
- Bank Employees
- Book Trade
- British Office Supplies and Services Industry
- Charity Sector
- Chartered Accountants
- Chartered Secretaries and Administrators
- Civil Engineers
- Civil Servants
- Commercial Travellers
- Confectioners
- Dentists
- Doctors
- Electrical & Electronic Industries
- Furnishing Trades
- Grocers
- Hardware & Housewares Industry
- Journalists
- Licensed Drinks Trade
- Mechanical Engineers
- Musicians
- News Trade
- Nuclear Industry
- Professions with NVQ Level 4+
- Officers
- Older People
- Public Sector Employees
- Royal Mail Employees
- Seafarers
- Solicitors
- Structural Engineers
- Timber Trades
- + Many More...

Benevolence Today Coalition Profile

With the addition of some new coalition partners over time, Benevolence Today has brought together 35 grant-giving charities.

The original 32 coalition partners helped 28,500 individuals in 2006/07.

The coalition had grown to 35 charities which helped approximately 37,000 individuals in 2008/09.

In 2009/10 the 35 partner charities are estimated to have helped approximately 44,000 individuals.

In net growth this represents an average of a 20% growth in beneficiary figures across the group, with growth in the individual charities varying.

Most partners in the Benevolence Today coalition have been occupational benevolent funds, representing trades, industries and professions. Some partners have been general benevolent funds, one is a regional fund.

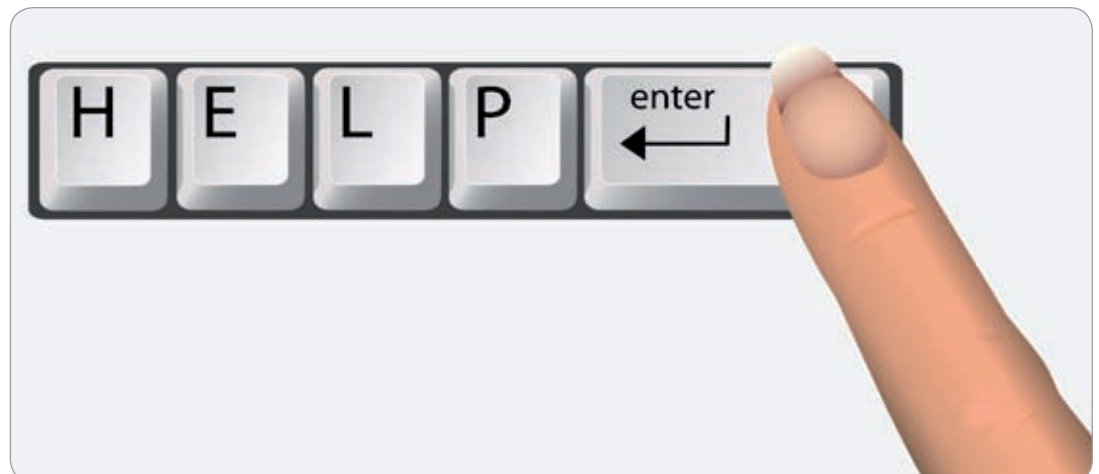
Size, annual income and grant volume of coalition charities vary widely, with the smallest partner having just £50,000 annual income, the largest in excess of £10 million.

This diversity has been a strength of the group as well as a challenge, as the capacity, outlook and culture of the organisations is very different. While this gives the joint work a strong element of bringing everyone together, no matter what size organisation, and offers the feeling of real exchange and potential for mutual support, it also posed specific issues around communication, joint vision and an agreed style of working, which has stretched coalition resources to their limits on occasion.

Services Provided

- All partners provide grants to individuals in need.
- 60% of Benevolence Today partners provide advice to people in need.
- 34.5% of organisations provide care services.
- 41.4% of partners provide loans, where grants are not suitable.
- 10.3% provide counselling.
- 41.4% provide a visitation service to beneficiaries.
- 27.6% provide other preventative services to help beneficiaries before a major crisis hits.

Source: 2007 Benevolence Today Statistics





Outcomes - Benevolence Today Campaign Work

Benevolence Today has been based on a holistic strategy, which combined awareness-raising with feeding back lessons learnt to coalition partners, to enable them to make their services as accessible as possible at the same time. The following points summarize the top level outcomes of the work carried out.

Awareness And Referral Outcomes

- Benevolence Today's *Working in Partnership* brochure was the result of feedback from the first contact with a large number of charities, in which these had asked for specific information materials on benevolent funds. The brochure was produced in cooperation with experts in the DWP's Local Service, Council & Care, Citizens Advice and the umbrella body for occupational therapists. It introduced benevolent charities to potential referral partners, translated 'benevolence jargon' into plain English, and identified and covered frequently asked questions about eligibility criteria and about how benevolent grants relate to state benefits.
- Over 2,000 hard copies of the *Working in Partnership* brochure were distributed to charities UK-wide, an additional 4,000 copies have been downloaded from the Benevolence Today website in 14 months, following publication in November 2008.
- Benevolence Today built a sound base of relationships with other organisations and agencies which also work with people in need. Through direct marketing and PR activities Benevolence Today targeted over 2,000 specific charities which work on health issues, care, disability, old age and poverty, as well as approx. 900 Citizens Advice offices across the UK. Direct marketing returns on cold contacts reached 6 percent and additional strong response can be seen through increased web traffic and downloads of promoted materials from the Benevolence Today website. The channel organisations which were reached (also called intermediaries or potential referrers) help an estimated 5-10m people in need per annum.
- Benevolence Today introduced its partners to the British Association of Occupational Therapists, a leading umbrella body for a profession closely related to their key beneficiary groups, as well as to the umbrella for Home Improvement Agencies. More direct introductions were made to a range of individual charities, and Benevolence Today communicated with different adviser and service-delivery groups through placing stories in newsletters of a number of umbrella organizations such as Advice UK, Help the Hospices et al.
- Benevolence Today-driven stories about benevolent charities in national media outlets and targeted charity- and care-newsletters reached an estimated PR audience of 3 million readers.
- At the end of 2008 a dedicated briefing to DWP Local Service staff on a national level brought a strong response in downloads of the introductory *Working in Partnership* brochure.
- Benevolence Today piloted cooperation with the NHS through a joint project with PALS, the NHS Patient Advice and Liaison Service, with a view to encourage more PALS staff across the UK to refer patients in need to benevolent help where suitable. As part of this project, the two organisations co-published a Directory of Benevolence Today partner charities, which was downloaded 2,100 in 8 months from the Benevolence Today website.

Public Affairs Outcomes

- Through the Benevolence Today coalition, the benevolent sector has been recognised by the Department of Work and Pensions' (DWP) Pensioners, Disability and Carers' Service (PDCS) as one of the stakeholder groups to work with in their recently published stakeholder strategy for the coming years following the coalition's participation in the PDCS Advisory Forum from 2008.



- Benevolence Today as a coalition responded to the Charity Commission's consultation on public benefit in 2009.
- In 2008 Benevolence Today held two stakeholder roundtables in Westminster to discuss the role of benevolent charities in making inter-agency signposting for people in need easier. Reflecting the key issues which Benevolence Today partners most frequently deal with, the two events focused specifically on health and social care. Organisations represented were the Department of Health, Home Improvement Agencies, Counsel & Care, Care & Repair, Carers UK, the Long Term Conditions Alliance (now National Voices), the British Heart Foundation and the NHS PALS programme.
- Following the two roundtables, Benevolence Today learnt that its partners needed to engage proactively with the current debate on the future of funding social care and consequently it participated in the consultation process for the Green and White paper on social care reform in 2008/09. It would also be beneficial for benevolent charities to engage further with the information prescriptions agenda, and the common assessment framework agenda, both of which Benevolence Today did some work on. More work is required beyond the means of the Benevolence Today project, to ensure benevolent charities are not only called to pay out for changing gaps in statutory provision, but use their funds in a meaningful and coordinated way.

WEB INSIGHTS

One in five web visitors has either downloaded the direct contact details of the Benevolence Today coalition partners or used the links to partners on the Benevolence Today website to access help directly for themselves or for someone they were helping.

One in 6 visitors has clicked through to use the Turn2us search facilities.

One in 6 visitors sent a page on to a friend or colleague, helping to promote the message.

50 percent of users use the website more than once a month.

75 percent of web users come to the site through a direct bookmark or URL, showing that the website is used by a targeted expert audience rather than random visitors.

Web Outcomes

The Benevolence Today website has been the key virtual platform for information about the coalition. It distributed coalition partners' beneficiary case studies, provided news about the coalition and allowed the download of key Benevolence Today information materials.

The website has been visited 45,000 times and downloadable materials were accessed over 6,000 times.

Directly Referring People to Help

From January 2008 on, the website linked to Turn2us' new online directory of grant-giving charities to promote a direct route to identify help in individual cases, once the general idea of benevolence had been introduced to visitors.

3,000+ visitors have used Crisis Information materials published by Benevolence Today partners in the follow-up to the recession since April 2009.

2,100 have downloaded the specific coalition partner directory which listed all contact details of Benevolence Today charities since June 2009. An additional 3500 visitors used the click-through directory of partners on the website to find individual charities.

Creating a Focused Audience

Analysis of the most-used elements of the website indicates that Benevolence Today's integrated communications planning has been effective. The audience of the website is a specialised one, which mostly comes to the site following efforts in other communication channels (direct mail, PR, events). 75% of visitors to the site come through direct bookmarks or entering the site URL, rather than randomly finding the site on google or other search engines. Throughout the campaign, there was a steady, organic growth in web audience, which in analysis reflected the pattern of the campaign's offline activities and reflected the widening network of relationships for the coalition. One in two Benevolence Today visitors used the website twice a month, showing a fair level of regular interest for a website which was not targeted to provide constantly changing news.

The majority of Benevolence Today partners lack comprehensive web statistics of their own websites. This has made it not possible for Benevolence Today to assess how many of the 45,000 visits to its website resulted directly in increased traffic to partners' websites, although anecdotal evidence by some proves referrals from the Benevolence Today website to partners' websites have been effective.



Marketing Cost Effectiveness – Lessons

Coalition partners are not able to share enough comparable data to calculate a direct return on investment per application received following from the joint working. Also, partners cannot separate Benevolence Today's impact from other impact factors such as funds' own marketing activities, the economy and partner activities. The following analysis is built on the figures which are available and contain some interesting benchmarking information about marketing in the sector.

In 2006, partners reported a total marketing spend of £1.6m spread across the coalition. If at the time 28,500 beneficiaries were supported, and 75% of all applications made to partners were successful, this means approx 38,000 applications for help were received by partners in total in a year. This would mean that the average marketing cost per application received to a benevolent fund in the coalition in 2006 was £42.

Coalition partners' total funding of the joint Benevolence Today campaign for two years was less than 10% of the total marketing spend organisations spent in only one year.

Figures earlier in the report show that Benevolence Today created a significant audience for its messages and awareness of benevolent charities. However, its channel strategy does not allow for a direct measurement of total return on investment.

Benevolence Today invested in long-term effectiveness through the education of third party referrers in other charities and agencies. It partnered with Turn2us as the main referral directory to signpost to. Partners can only give general feedback – but no precise figures – on whether they have received referrals from third parties, other charities and Turn2us, which are analysed in the Impact Chapter below. They were not be able to track direct referrals from Benevolence Today, other than as in their web traffic statistics, as Benevolence Today marketed to third parties, not directly to end users.

Essential statistics though support significant cost-effectiveness of the joint work in Benevolence Today.

Linking Benevolence Today's web spend to the total number of visits to the website, each visit cost approx. £0.05 to generate.

Creating a link between targeted Benevolence Today marketing spend and achieved readership for its 'Working in Partnership' brochure and 'Benevolence Today Directory', one can calculate a marketing cost of approx £0.50 per reader over a three-year period.

This figure does not take into account that since the majority of the audience for both brochures were professional advisers it is most likely many of them will have shared their copy of the two brochures with one or more colleagues, and pass on the information to people in need over time when it is useful, thus increasing and replicating the audience over time, which cannot be measured reliably.



Benevolence Today Impact 2007-2010

Benevolence Today carried out internal benchmarking research among its partner charities on three occasions (May 2007, January 2009, February 2010). The first partner survey carried out in 2007 measured how many beneficiaries were helped in 2006, the final survey in January 2010 measured figures for 2009. The following sections on service, referral and beneficiary patterns draw largely on the results of this internal data gathering, which was carried out for the purpose of benchmarking as well as outcome measurement.

Beneficiary Patterns 2007-2010

In 2009 Benevolence Today partner charities helped over 44,000 people in need.

- Overall, beneficiary figures across the coalition have increased by 20% at the beginning of 2010 since the start of collaboration in 2007. This is a relative figure which is set in relation to the actual beneficiary figures the coalition supports, bearing in mind it had a few partner charities joining the group over time.
- In total, adding in the partners who joined along the way beneficiary figures were 28,500 in 2007, 39,500 in 2008 and 44,100 by the end of 2009.
- 38% of these total beneficiaries by 2010 were new beneficiaries who applied to a fund for the first time.

The biggest growth in beneficiaries is in non-grant services. This means many Benevolence Today charities help more and more people through advice and other support services, either in addition to financial support, or instead of financial support.

The partners with the highest beneficiary figures also often have high percentages of new, non-grant-based services. This is and has been a strong indicator that new service delivery models may play an important role in effectively supporting more people in need in today's society.

The majority of the eleven Benevolence Today partners which exclusively give grants, and provide no other support or advice services, have a much smaller percentage of new beneficiaries than other partners.

These findings do not only reflect that some charities have the capacity to develop new services while others do not. Research has shown how reluctant people in need are to apply for help from a benevolent fund, especially for money. Offering non-financial support seems to have a lower hesitation-threshold for potential beneficiaries. Such services can lead to further financial support later, should it be required, when beneficiaries have lost their inhibition to ask a fund for help.

In some charities beneficiary figures have actually declined slightly, often due to the phasing out of older grant programmes, which have not in all cases been substituted by new grant programmes. With service delivery undergoing significant changes in some charities, fluctuation or beneficiary figures has ranged from -200 to +2500. In most cases where there were receding figures, the decline was a couple dozen beneficiaries.

This is an indicator that a one-size-fits-all-awareness model like the original concept for collaboration in 2005/06 may not support the need of specifically smaller, niche-industry occupational benevolent charities. Benevolence Today reviewed its strategy during 2008/09 to widen its remit from the initial brief and models have been discussed internally how such smaller charities could benefit further from development work carried out by larger charities.

Overall, beneficiary figures across the coalition look promising, and Benevolence Today's strong input into the optimisation of the Turn2us search engine is expected to lead to further growth in the short and medium term. Furthermore, the changing patterns in grant-giving and referrals below show Benevolence Today's influence across the board in other ways, which will affect partner charities long-term.



Grant-giving Patterns 2007-2010

In their effort to make their resources go further, and to meet the need in their target communities, more and more benevolent charities are providing support for people in need which is not grant-based. This means there is a variety of counselling, advice and other support services which Benevolence Today partners have been piloting and implementing. Examples are given in the Chapter on Service Innovation below.

This has impacted on a significant shift in the grant-giving pattern of Benevolence Today partners.

- In 2008 Benevolence Today partners gave £33m to approximately 33,500 grant-recipients.
- In 2009 they gave £29m to approximately 24,400 grant-recipients.
- This means that while in 2008 grants made up 85% of the total support provided by the benevolent charities in the coalition, by the beginning of 2010 this percentage has fallen to 74%. While total beneficiary figures across the coalition have increased significantly, grant-recipient figures have been going down.
- This does not mean though that Benevolence Today partners have helped less people in total, as beneficiary figures in total have increased significantly.
- The average grant-size to an individual has indeed increased – it was £985 in 2008, and £1,183 by the beginning of 2010, which is an almost 20% increase.

This rise may be explained by Benevolence Today's analysis of what grants are given for.

The largest growth areas for grants in 2008 were debt (65% of partners saw an increase in grants for this purpose), adults of working age in a life crisis (67% saw an increase), adults of working age facing illness (59% saw an increase) and grants for home improvements and disabled facilities (40% saw an increase).

The same pattern reflects in research in early 2010. In the past year, 81% of Benevolence Today charities saw an increase in grants to help people in debt, 79% saw an increase to support adults of working age in crisis, 69% saw an increase in adults of working age who face illness and 37% saw an increase in grants to support home improvements and disabled facilities.

The largest decreasing grant area in 2008 was educational grants for children (which 15% of Benevolence Today partners saw decreasing), by 2010 the largest decreasing grant area partners identified was regular income support for older people (23.3% saw a decrease).

Lessons

- Benevolent charities services are becoming more targeted – more and more help is given to adults of working age, which are often a group under-supported by statutory benefits in comparison with other groups.
- With the state pension credit system being effective, there has been less need for benevolent charities to provide regular income support for older people.
- Similarly, with child poverty reduction being a national key target, there has been less need for benevolent charities to support as many children in traditional grant-programmes as before.
- The increase seen by a large number of coalition partners in grants for home improvements and disabled facilities may be a contributing factor to the relatively high increase of almost 20% in the average grant-size in just over a year. Such grants usually are much higher, and Benevolence Today has been careful in its relationship building work to not open floodgates to requests which would not be sustainable, given the limited financial and organisational capacity of many benevolent funds.

The average size of a grant has increased by almost 20% between 2008 and 2009, while high demand for home improvement and other one-off grants is being noted.

The most significant shift is that Benevolence Today partners are increasingly supporting adults of working age in times of crisis and illness.



Many occupational benevolent charities' links to employers and employees in their community are not optimised.

Referral Patterns 2007-2010

In 2007 research by Benevolence Today only 7% of partners say that most, only 21% say some of their referrals come from employers at the moment. Similarly, only 3% say most, only 31% say that some of their referrals come from professional or trade organisations. As at the time all but two of the Benevolence Today partners were occupational funds, one would expect stronger industry-links. Benevolence Today did not have a remit to support partners in their employer-community relationships, but some aspects of this are discussed below in the section on capacity issues of smaller occupational benevolent funds, and in the mapping section towards the end of the report.

Intermediary Referrers

Notable in the 2007 research is that 72% of coalition partners said that most or some of their referrals came from other charities. This figure was qualified by in depth conversations with Benevolence Today partners when it became apparent that with 'other charities' most had meant the large military case-working charities such as SSAFA and the Royal British Legion, which have dedicated capacity to refer cases to other non-military benevolent charities on a high-volume scale.

A large percentage of referrals in 2007 came from other *benevolent* charities. Equally, 90% of partners say they refer people to other benevolent charities, but 90% also do not record who they refer to within the sector and what the outcome is. This leaves definite room for improvement in the sector to improve the user-journey of a person in need once they make contact with a benevolent charity.

By the 2008 survey, following Benevolence Today's initial communication activities with the wider charity intermediary community, the picture started to change.

The larger and non-niche partners started to report increased case referrals from third parties, such as Care and Repair, occupational therapists and CAB offices. A handful of other charities which had been on Benevolence Today's mailing list were also mentioned by name as anecdotal evidence that the message to a wider base of intermediaries started to get through. 32% of partners officially reported an increase in such wider 3rd party referrals, 29% were not sure but thought it possible.

By the beginning of 2010, as Benevolence Today comes to an end, 37% of partners confirm an overall increase in referrals from 3rd party intermediaries, 17% are not sure but think it is possible they receive more.

However, when looking at the actual breadth of referral patterns which the group now experiences, results look promising. While the vast majority of 3rd party referrals in 2007 had come from the highly effective Forces' charity SSAFA, by 2010

- 41% of partners have seen referrals from the NHS/medical staff
- 61% have seen referrals from benefits advisers, 64% from local authorities
- 63% have seen referrals from disability charities
- 40% have seen referrals from cancer charities
- 33% have seen referrals from other health charities
- 52% have seen referrals from charities for older people
- 68% have seen referrals from Citizen Advice offices

All of these intermediaries directly represent targeted Benevolence Today work and show a much more varied group of referrers to Benevolence Today partner charities than at the beginning of the project three years ago.

Given the selective community of most partners, not all will have seen the full breadth of new referrals, but the average across the group is a positive indicator that Benevolence Today messages have been highly effective.

Provided the new referrers have effective experiences in dealing with the benevolent charities they contact on behalf of clients, a future organic growth of this new referrer community is to be expected.

There has been a significant widening of the range of organisations which refer people in need to Benevolence Today partners.

The referral channels reported by partners match exactly the target audiences Benevolence Today has been working on, showing that relationship-building and awareness has started to pay off.



Despite the addition of the new referral channels, the strong and valued links with the military referrers remain in place and effective too. 89% of Benevolence Today charities report referrals from SSAFA in 2009, 75% from the Royal British Legion. 83% also see continued referrals from other benevolent charities.

Turn2us

Since 2007 Benevolence Today has partnered with Turn2us, a project by coalition partner Elizabeth Finn Care, which offers an online database of benevolent and grant-giving charities. Users to the Benevolence Today website and other Benevolence Today audiences have been directed to Turn2us to identify contact details of individual funds to close the final gap between beneficiaries and benevolent charities which can help them.

Benevolent funds are listed in charity directories which aim to allow people in need to find help. But within the directory, by which search terms can a charity be found? Where does the directory get its information about the charity from? How does it maintain the data?

To ensure its coalition partners' interests and needs were met, Benevolence Today has represented them on Turn2us' Strategic Development Group, on Turn2us' Board, and on Turn2us' Charity User Group. Benevolence Today has worked closely with Turn2us staff to ensure coalition partners were in suitable, accessible search categories on the Turn2us database, and that other Turn2us referral processes, specifically around the added telephone help-line were as much aligned with the actual operations and needs of Benevolence Today partners as possible.

Consequently, it is a positive result that the 2010 research shows 65% of Benevolence Today charities have seen referrals from Turn2us, a figure which is expected to rise over time.

65% of Benevolence Today partners report to receive referrals through the Turn2us search directory by the beginning of 2010.

The Impact of the Recession

Research among all Benevolence Today partners in early 2009 showed that there was no overarching sense of doom among the coalition, as in some other parts of the charity sector. A clear impact of the recession was noted on two sides: on the one hand charity income had taken a significant hit, on the other hand demand for services was growing.

- 26% of partners reported that losses in their investment portfolio will require them to have a close look at their grant-strategy for the coming years.
- 52% reported strong losses, but said they do not expect this to influence their grant-strategy in the short term.
- 16% reported a decrease in funds raised from individuals.
- 44% said they have lost direct fundraising income, but do not yet expect this to impact on their grant-giving strategies.
- 26% of partners said they have had a strong enough decrease in fundraising income from their industry, trade or individual employers that will have direct impact on their grant-giving strategy for next year.
- 47% said they noticed a decrease in fundraising income, but it will not affect their grant-giving significantly.
- Asked an overall question whether they expected the fallout from the economic crisis to affect their grant-giving, 45% said no, 40% think it is possible there may be an impact, depending on how the recession develops.



Adviser Feedback

At the end of 2008 a Benevolence Today briefing was shared with DWP front-line staff in the Local Service and other departments through the DWP intranet.

This sparked significant interest in the Working in Partnership brochure, which was consequently downloaded over 4,000 times in total from the Benevolence Today website.

Twelve months on, at the beginning of 2010, Benevolence Today ran a short poll among DWP front-line service staff to assess their view of benevolent charities. The aim was to get direct feedback from agencies, which work with a similar clientele to benevolent funds and find out what they think works and does not work in their potential cooperation with benevolent funds. 309 DWP staff members responded. Results are below:

33% of respondents agreed with the statement that benevolent charities are modern, effective organisations. Only 14% stated they thought benevolent charities to be old-fashioned and not very effective.

Some respondents explained that, like other intermediaries, they have mostly used military benevolent charities to refer people to in the past.

Key issues pointed out were:

- While benevolent charities are often effective, other advice agencies need to know more about how they relate to their own line of work specifically so they can use them for the best possible outcome.
- There is a danger for benevolent charities to just act as a sticking plaster for problems, rather than a means to resolve them.
- While benevolent charities do good work, there is big perceived potential for people to abuse the system.
- Referrals to benevolent charities are made more difficult because many advisers in benefit delivery centers have lost the traditional link to clients, and often can just refer, but not follow-through cases to learn how successful a referral has been.

Asking specifically about advisers' awareness of occupational charities, only 10% of respondents say they have so far frequently used occupational charities to find help for clients. Another 36% say they have referred people but find it hard to find the right occupational charity. Over 50% are not aware yet of the offer of occupational charities.

Of those who have experience referring clients to benevolent charities, 25% found useful help, and 24% say they did not have any problems and found help effectively. 26% say they have only referred to military benevolent charities.

Of those who have unsuccessfully tried to refer clients to benevolent charities the leading barrier identified by 37% in this group was that clients did not want to go through more means-testing. Another 31% mentioned eligibility criteria being too tight for their cases, and 26% could not find a suitable charity.

Of those who have successfully applied to benevolent charities on behalf of clients, 32% say that the benevolent fund responded fast and timely, 30% found the charities easy to find. Only 20% say that application forms were straight forward to fill in and 19% say that eligibility criteria were clear. 8% already used Turn2us to identify charities successfully.

32% of those who referred successfully said they found non-grant services, such as advice or support for their clients from benevolent charities.

Asked what benevolent charities can do to make the identification of help easier for advisers, 73% say they need an online directory of benevolent charities, 60% want a telephone helpline, which both already exist in the form of Turn2us. Further promotional work of this will be necessary among DWP agencies.

49% would like to receive information at events and conferences, 48% would welcome other web-based information – such as provided directly by Benevolence Today, and 36% would be interested in specific training on charity grant-giving.

QUOTE: 'Charity provided first class targeted individual assistance to the customer and their family. Compassionate and empathetic.'

QUOTE: 'Several charities made a huge effort to combine and offer financial, practical and emotional help during a crisis in this area.'

QUOTE: 'I think you give a good service which people need when they hit hard times due to illness etc.'



One respondent said 'There are people who will ask for everything. There are also those who will ask for nothing and are probably in the most need. How to reach them (is the question, ed.). Visitors could be gate keepers.' One suggestion made was the idea for every JobCentre Plus to have a staff champion who could keep colleagues reminded and informed about working with charities like benevolent funds.

40% of respondents voice an overall positive opinion of benevolent charities. Of this group, 16% say that their understanding of and view of benevolent charities has improved over the last couple of years, and 24% say they have always had a positive opinion of benevolent charities. Only 2% say their opinion of benevolent charities has got worse, and another 7% say they never had a positive opinion and still do not have one.

Negative feedback reports of anecdotal evidence of unhelpful staff, inaccessible application forms, slow decision-making processes, reflecting unsurprising inconsistencies across the sector. Positive quotes from respondents say 'Small amounts of money can help people when all else fails' and 'Just sorry I have not been aware of Benevolence Today until now, but I will make a point of looking into what help it can offer in relation to my client group.'

Overall, there is strong interest in benefit advisers to refer people to benevolent charities, and awareness is slowly but definitely increasing. However, both benevolent charities and agency advisers need to be aware that benevolent charities can help many different communities, but they will not be able to help in all cases as the charities are bound by their charitable objectives to certain criteria. Managing expectations of advisers needs to go hand in hand with awareness.

QUOTE: 'I think that these charities are hard for the general public to find, also there is a stigma attached to anything involving getting 'help' from a charity.'

QUOTE: 'Customers lives can get so tangled in various ways, being able to signpost them to possible help would at least be a help to all and sundry.'

A similar, smaller survey among charity contacts in 2008 brought the following feedback, which shows Benevolence Today's work with charities has taken more hold than with the more diffuse audience of benefits advisers:

- 50% of respondents were aware of benevolent funds before, 20% said vaguely, only 30% did not know about the benevolent sector.
- 36% of respondents said they had used benevolent funds before for clients, 43% said they used them, but found it hard to access them.
- 63% of those who had referred clients to benevolent charities said they found useful help for their cases.
- 80% were interested in specific training on benevolence and grant-giving.
- 40% said they employ occupational therapists, health or social workers for who it would be useful to understand more about benevolence.

The Policy Link

Benevolence Today's research has shown that benevolent charities most frequently support people with medical conditions, where financial need is a consequence of someone's underlying health issues or care needs, whether they are short- or long term. Benevolence Today asked National Voices, the Patients' and Carers' umbrella group, for feedback on what they have learnt about benevolent charities' role through working with Benevolence Today.

Mark Platt, Director Of Policy, National Voices. 'I think that the Benevolence Today project has been a vital and timely initiative from the benevolent sector. As organisations that are often picking up the fall-out from the economic and social effects of public policy choices, it is only right and proper that they begin to bring their knowledge and experience into the public policy arena. I hope that the lessons from Benevolence Today will be translated into policy and practice by the sector.'

He concludes 'The downturn in the economy, the cuts being made to public services, the likely poor settlement that will be made on the provision of social care... all of these will impact, in some way or other, on the benevolent sector. Unless the sector wants to merely act as an old-fashioned social scheme, it must engage with the policy process, so that it is in a position to influence the choices and decisions made by government that will ultimately affect it and the people that it seeks to help.'



Challenges Benevolent Charities Face - Analysis

Collaboration between benevolent charities makes business sense on a variety of levels – yet it is hindered by a lack of resource within the charities themselves. The following areas need to be further explored and better understood.

The key issues are

- Capacity Issues in Benevolent Charities Overall
- Staff Capacity in Benevolent Charities
- Charities with Small Target Audiences
- Benevolent Charities Eligibility Criteria
- Issues around Media Relations Concepts
- Barriers to Benchmarking in the Sector

Capacity issues in Benevolent Charities Overall

On average, a Benevolence Today coalition partner has 8 full time and 4 part time staff. Six Benevolence Today partners had no full-time staff at all in 2007. Given that such small staff numbers arrange support for close to 30-40,000 people in a year, the importance of focus to their work becomes clear.

Traditionally, benevolent charities have utilised the support of volunteers to link into their communities. Volunteer figures in the Benevolence Today coalition are significant, and the small in-house staff numbers have to manage some quite large volunteer teams on top of their other responsibilities. The average number of volunteers in the coalition per organisation is 169.

Two key challenges arise from the wide use of volunteers in benevolent charities. First, there is no unified provision of welfare and case-working training in the sector which could ease the burden on the individual funds to keep their volunteer force up-to-date and well-trained. Second, many charities are dealing with an ageing volunteer force, and are yet to develop strategies to build strong links with younger audiences in their target communities which will give sustainability to their volunteer resource strategies.

An additional consequence of the relatively restricted staff resources in the sector is that organisations often face limited internal resources to manage IT, marketing or policy work. At the beginning of Benevolence Today no partner charity had internal policy work capacity, by 2010 one partner had such internal capacity.

2007 research showed that most Benevolence Today partners based their IT systems on a Microsoft platform, none reported to use open source or other potentially lower-cost IT solutions. Some were limited in their use of websites as they themselves could not keep their website interactive, as it was managed by an industry or professional organisation the individual benevolent charities are linked to. When asked, most partners stated that what keeps them from developing a more targeted IT strategy is lack of time to think about it.

Staff Capacity in Benevolent Charities

2007 research showed that Benevolence Today partners vary in size from 1 to approx 50 members of staff. This staff base supports between 50 to 8,000 beneficiaries a year in individual charities. Most charities' capacity to help is limited less by income available but by staff and consequently skills available.

This influences the range of potential awareness campaigns carried out on behalf of the sector. A proven strategy is to aim awareness work at very focused adviser-groups, which can filter applicants they refer to benevolent charities. This strategy is favoured by some non-Benevolence Today charities which only accept applications which come through 3rd party agencies. Benevolence Today has also chosen this approach in its campaigning work as it matched the available resources of its partners. All of Benevolence Today's integrated marketing and communications work has been targeted at advisers and other client-facing experts in the charity and public sector to generate referrals rather than aiming messages at the broad public.

An additional future strategy can be for benevolent charities to add to their staff capacity

Small staff numbers manager large numbers of volunteers.

Benevolent charities often have restricted internal capacity to regularly review and optimise IT systems, which could enhance how charities work.



either directly or through outsourcing. This would allow a more proactive approach to raising awareness through national advertising or media strategies which could target individuals in need directly. Any such work would need to have a strong behaviour-change focus to encourage those who need the help most to apply, an endeavour which will need significant resources.

Charities with Small Target Audiences

Some specific issues affect benevolent funds with a small target audience, some of which have participated in the Benevolence Today coalition.

Benevolence Today's results indicates that charities with a larger footprint in society – those who are most likely to be able to help more people – will benefit most from joint marketing to third parties, and will get faster results by marketing through directory referrers like Turn2us, funderfinder etc.

Smaller niche-market benevolent charities, many of which represent single employers or smaller industries and trades, will also benefit from marketing through directory referrers like Turn2us, or directly to third parties like through Benevolence Today – but since they can help a smaller percentage of the total population than other charities, results will take longer to trickle through to them than to other, more widely 'relevant' charities. Structurally, in the long term, it will be effective for these charities to keep investing in this kind of joint marketing. However, if they are looking to proactively increase their beneficiary and income base, additional measures may be considered.

For these smaller, niche-market charities it is advisable to rethink and add capacity to their direct community- and employer-based marketing. With their ageing volunteer forces shrinking, the traditional second strategy of many industry-focused benevolent charities used to be to market to employees and pensioners in their industry directly through employers' help. As data protection has made this more difficult, new ways will have to be explored, which include building good communication links to younger people working in industries – this can be through employers, or through professional and social networks, both online and offline.

As some benevolent charities are considering how they can support their community 'from cradle to grave' it may also be advisable to explore how benevolent charities can be relevant to and involve people training for specific professions, trades or jobs and working with suitable training institutions, rather than relying exclusively on employers' HR and welfare links as was the case in the past.

An additional strategy for such niche-market funds can be to review services and potentially replicate some of the new service delivery models developed by some of the thought-leaders in the sector.

There is big potential to progress both strategies by developing capacity in tandem with similar charities. In contrast, as a rule, national PR and media-work will be less cost-effective the smaller a charity and its potential footprint in wider society is.

Benevolent Charities' Eligibility Criteria

The eligibility criteria which an individual needs to meet to qualify for financial help vary across the coalition. The defining elements for eligibility are:

- Age, Location and Faith
- Length of Service in an Industry / Profession / Trade
- Membership of Professional Bodies
- Income or Savings

The benevolent sector overall is in a period of transition. Many funds have reviewed their eligibility criteria to a degree to improve accessibility to the help they provide. Becoming more accessible to beneficiaries does not mean however that it is in the best interest of the sector to lower barriers for means-testing to an unreasonable level. Some benevolent charities have carried out work to identify where the greatest need lies and how they can best help people in their community with what they actually need most. To replicate such work in more and more benevolent charities is one of the key challenges the sector faces in the future.

Niche-market benevolent charities need to strengthen direct links to their communities, but can work with others on developing joint concepts and services.

Benevolent charities often have restricted internal capacity to regularly review and optimise IT systems, which could enhance how charities work.



Many occupational charities can only support direct employees in an industry, which does not yet reflect the changing structures and outsourcing patterns of business.

Benevolent charities cannot help everyone, but they can help many. They are an essential part of the wider social support system in the UK.

Media communications strategies for benevolent charities need to be balanced with first-class fraud prevention systems to prevent abuse of the system.

As part of the drive to meet current needs, a number of benevolent charities have begun to offer non-financial help, such as specialist support or advice, for which eligibility criteria do not necessarily apply in the same way as for financial grants.

Due to the diversity of the benevolent sector, most in it like to think that there is a benevolent charity for everyone in society. But as industrial and business sectors have changed beyond recognition in the last few decades, more gaps in service provision have occurred.

Many benevolent funds are not able to align themselves with structural changes in the industries and business communities they support due to governance or capacity restrictions.

An example is that many businesses work increasingly with high percentages of outsourced and contract-based workforces, while many eligibility criteria for occupational benevolent funds remain focused on direct employment for an employer in a specific field. Some funds will be able to work on their eligibility criteria and the underlying governance rules, in other cases this will not be possible.

Reality is that while there are benevolent charities for many people in need in society, they cannot help everyone. They need to work in close cooperation with other charities and public sector agencies to form a solid support system for those in need, and need to be as clear as possible about who they can help and where their priorities lie, in order to make it easier for others to refer cases to them in a meaningful way.

Benevolence Today has done some ground-breaking work to pave the way to enable benevolent charities to do just that, and to build the right links with complementary agencies to improve how people find the help they need.

Issues around Media Relations Concepts

The impact of traditional PR-work is widely misunderstood in the benevolent sector. Where individual benevolent charities are able to attract local media interest through a local case study of a beneficiary, they can benefit from good PR outcomes. However, in the last two years informal monitoring has shown that 90% of such coverage is secured by military benevolent charities. Due to the high profile of the Forces and their current engagement abroad, media interest in this part of the benevolent sector is high. Other benevolent charities fare less well and are in a very different position.

Two main barriers exist to securing more media interest in different benevolent charities. First, most benevolent charities are traditionally protective of the privacy of their beneficiaries, which makes it very difficult to attract the interest of journalists who often need a human interest angle to make a story work. Second, as benevolent charities have few mechanisms to compare data and publicise their combined impact, they do not have the capacity and data availability to proactively pitch stories to the media which relate to policy issues of high interest to the public on a regular or frequent basis.

If the benevolent sector were to invest in building a better understanding of trends in its services, trends in grant-giving, and of issues beneficiaries face with statutory funding, it could attract more of the media interest it craves. However, given the capacity issues analysed above and the data-gathering issues explained below, it may be a way to go until a more comprehensive media strategy would be meaningful. Furthermore, if benevolent charities were ready to embark on a wide-ranging mainstream media communications strategy, they would need to ensure that they have the right level of application management capacity in place - as well as enhanced fraud prevention and risk management systems to deal with much less pre-selected applications for help.



Barriers to Benchmarking in the Benevolent Sector

The main barrier to gather comprehensive, meaningful data about impact and outcomes from the benevolent sector is the lack of a common terminology and some level of unified data availability. While some charities use the term beneficiary only to describe grant-recipients, others use it to include grant-recipients as well as recipients of other non-financial services. Yet other count not only an individual who receives financial support, but all members of a family who are helped through one grant.

The 2nd and 3rd Benevolence Today partner surveys have taken that into account and differentiated between beneficiaries and grant-recipients.

A second issue arises out of the fact that when asked how many grants have been provided most charities measure a grant (whether it is a one-off grant or a regular payment) while others measure individual financial transactions (which would make a regular grant paid weekly 52 small grants paid out over the year).

These factors were recognised in the analysis of research carried out. Hence results are preceded by an 'approximately' tag where averages had to be factored in to project meaningful results from different measurement practices.

An additional problem arises out of the fact that while a collaborative project has to set specific dates for its internal benchmarking research, 35 charities in a coalition will have different financial years and hence measurement cycles themselves. In each benchmarking exercise, the latest figures available from each partner charity have been taken as the most up to date/latest result.

It would be useful for benevolent charities to agree on a basic set of uniform measurables across the sector to measure what services they are providing for how many people with what focus.

Such information is a major prerequisite to communicate clearly with other agencies who help the same people, and who can refer people in need to benevolent charities. Lacking such overall figures as a sector is a key barrier to making services accessible and outcomes transparent. Also, it makes it more difficult to align benevolent services with statutory services in a meaningful way. This also has implications for the fundraising potential of benevolent charities in an increasingly competitive charity market.

Benevolence Today research has been aimed at answering frequently asked questions raised by third parties towards benevolent charities, which will allow such third parties to have a clear picture of what benevolent charities do and where they can help. This can also inform future data gathering needs among benevolent charities and the development of sector internal knowledge management systems.



Benevolence Models for the Future?

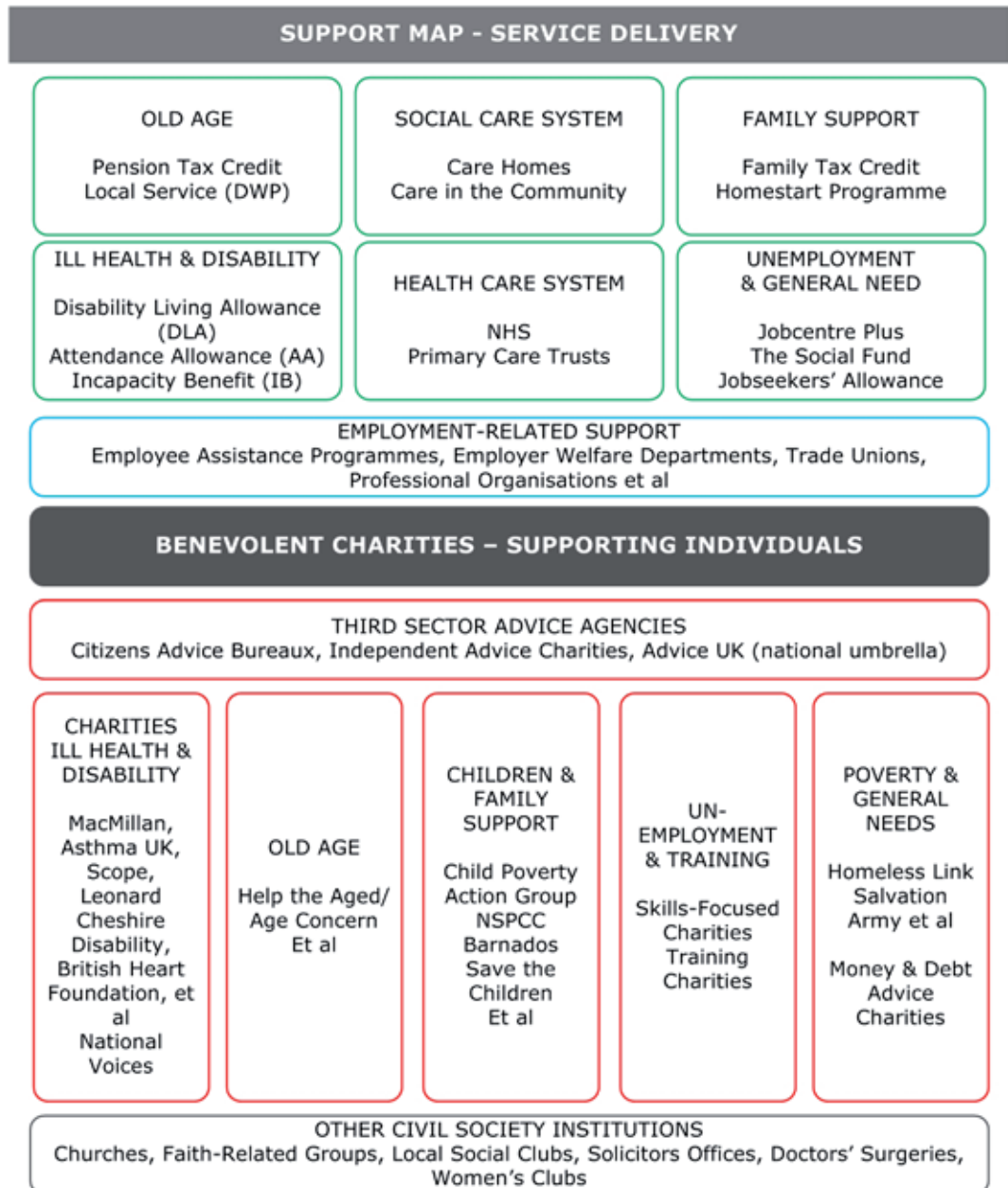
Benevolence Today and its partner charity Turn2us have been fulfilling an important bridging function to signpost referrers and agencies dealing with people in need to grant-giving and benevolent charities.

Benevolence Today has also worked with its partner charities on making such awareness sustainable by analyzing what benevolent charities need to do to meet the need and to build capacity alongside the awareness.

Mapping the Position of Benevolent Charities

This graph sketches the layers of help available to people in need. The boxes show examples of support, benefits & agencies, all of which play a role.

Benevolent funds sit in the middle of a complex picture. They relate to state benefits, company & work-related welfare schemes and other charities' work.



Benevolent charities sit in an interesting position on the map. They sit alongside the provision of statutory benefits, as they themselves give financial support to individuals, which is sometimes seen as a top-up to where benefits cannot help or help further.

They also relate to other charities, which their services are complementary to, which they can take referrals from, and with who they can partner in service-delivery.



Finally, an additional layer which contributes to society, which is sometimes overlooked, is business and the corporate sector. The biggest capacity in the benevolent sector lies with occupational benevolent charities, which due to their links to industries, trades and professions could play an interesting role in the future to encourage business to develop new models of corporate social responsibility to look after their own communities.

It seems there is a big opportunity for occupational benevolent funds to strengthen the ties with employers through positioning themselves with a new confidence in the industries, trades and professions they support. Those charities which manage to meet the challenges of internal capacity-building are ideally placed to partner in a prominent way with employers on being their main channel to look after their own community in a meaningful and targeted way.

There is a new role for occupational benevolent charities to be found in corporate social responsibility programmes.

Innovation in Service Delivery

Benevolent charities have traditionally valued their independence. They also operate in such different communities, that no one-size-fits-all model is possible. But collaboration and the development of opt-in models of shared good practice and service provision are possible.

Many Benevolence Today partners have researched and trialled new services to meet the needs of their communities.

To give an impulse for potential future thinking in the sector, this section highlights some examples of new service models, some of which are run in cooperation with 3rd party experts to add to the benevolent charity's internal capacity in skills and expertise.

Researching need in communities has shown new challenges for benevolent charities. Some have updated services accordingly to meet the need.

Caravan: Tackling Financial Capability to Combat Financial Need

Research carried out for the Grocers' charity, Caravan, by management consultancy Accenture in 2003 showed that Caravan's resources will be insufficient over time to meet the financial needs of all those in need within its sector. With a view to provide a non-grant service which would prevent poverty, Caravan looked into providing financial capability training as an option. By enhancing financial capability in their community, Caravan hoped to help people to understand money now and their money needs in the future.

At the same time, the FSA had developed a set of tools which could be used in workplace-based learning for this purpose. But the FSA needed to get access to employees. With Caravan's natural constituency of some 1.7 million workers, an agreement between both organizations was done. After trialling the original FSA materials in workplace-training seminars Caravan decided to produce a shortened, easy-access DVD based on the materials to widen their reach. For those organisations within the grocery trade who have the time and facilities, Caravan is still able to come in with the seminar. But in addition, the Caravan Financial Capability DVD with the title 'Give yourself a money make-over' has now been distributed to 14,000 employees in the grocery business since 2008.

BBF: Developing Joint Service Provision with Expert Charities

In 2007, research showed there may be up to 1,200 children with autism in the banking community which BBF could support. Autism, a developmental disability, is a life-long condition – children with autism grow up to be adults with autism. Money and support from the Fund were not enough, specialist support was required to achieve the best outcomes for those living with the condition. To add specialist expertise to its in-house capacity the BBF decided to enter into a partnership with the National Autistic Society (NAS).

In 2007, the BBF and NAS created *Investing in Brighter Futures*, a ground-breaking partnership between a service delivery charity and a benevolent fund. With dedicated staff at NAS focusing specifically on this service, interaction between the partners is based on exact protocols and regular communication. To date, the project has provided support to 276 families, including 552 children of whom 285 have ASD (Autism Spectrum Disorder). From speaking to families who have applied to the programme,



both BBF and NAS have been really pleased to learn that the programme is making a real difference to their lives. After 2 years, the number of families reached since the start of the programme represent a 23.5% market penetration of the assumed 1,200 potential cases. This is much higher than the 0.6% reach the BBF has in the estimated banking pensioner community, which proves that focused programmes reach selective audiences best.

For the BBF, *Investing in Brighter Futures* has not stopped there. The Fund has recently expanded the reach of the brand to include a new partnership with another 3rd party charity, Leonard Cheshire Disability, to support people with disabilities.

Maritime Charities: New Ways to Relieve Social Isolation

In response to research conducted by the Maritime Charities Funding Group (MCFG) on the needs of seafarers and their dependants, a number of development projects have been established to test out how the introduction of targeted services can help to develop the role of benevolence in today's world. Working with Community Network, a charity that specializes in social telephony, MCFG has set up a series of telephone social groups under the project title *Seafarer Link* in Wales, The Wirral and Hull for older former seafarers. Research had indicated that social isolation was a key issue particularly for older seafarers who, because of their seafaring lifestyle had never married or formed long term relationships.

Participants in the groups are a mixture of people currently in contact with a number of maritime charities and those who were not but responded to the publicity about the project. The best endorsement for the project comes from one of the participating seafarers '*Seafarers Link* has revitalized the men in the group. We swap stories about the ships on which we served and the adventures we had'. The project has won a prize for the innovative use of technology awarded by BT and the Telephone Helplines Association in 2009.

CABA: Fighting Root Causes of Financial Need Among Chartered Accountants

Since 2005, CABA has developed new, non-grant giving services which are relevant to its potential beneficiary community in the 21st century and helps the charity meet its objectives. One example is the free and confidential Advice and Counselling Helpline providing telephone counselling, legal and medical advice, launched in 2005. This initiative followed research which indicated that many of the issues that bring people to the charity for help are stress-related. The aim of the helpline is to provide information, advice and support at an early stage, helping to prevent stressful situations becoming long term issues.

By 2009, the helpline dealt with 704 callers, the highest number since its launch. Additional support has been provided through the development of stress management and well-being training sessions. 95% of delegates reported a long-term benefit after 3-6 months. One beneficiary described their experience; 'The understanding of the need to bring the level of stress down to the neutral level on a regular basis was key for me - I learnt that if I don't do this and relax regularly, I am heading for trouble. While feeling particularly pressured at the end of the year, I was able to recognise the signs of excessive stress and I took positive steps to reorganise my priorities and, as a result of this, I came out of that period safely.'

In response to the effects of the recession, CABA is working in partnership with its professional body, the ICAEW, offering workshops for members of their profession facing redundancy or long term unemployment. CABA recognises the impact unemployment can have on an individual; not only financially but on their physical and emotional well-being and this is a proactive approach to helping members of its community in their search for employment.

For the future, CABA is considering the development of third party partnerships with organisations which are able to provide specialist and relevant services to meet the needs of its potential clients, and move closer to providing an holistic support service.



5 Key Lessons for the Future

1. Benevolent charities are increasingly helping where help is needed most. Adults of working age in times of crisis are a main growth area for support needed.

The nature of benevolent help is changing. Less regular grants are given to top up pensioners' low income. Instead, more financial help is provided on a one-off basis, often for people of working age, who face financial issues due to personal or health-related crisis situations. There is a big potential to help people in such circumstances, but more work needs to be carried out to ensure benevolent help is not just a random 'sticking plaster' but instead aligns in a meaningful way with other benefits available to people, and with services provided by other agencies.

Although the benevolent sector is relatively small, the Benevolence Today campaign has shown that a small player can effectively play its part, and be proactive in working towards better signposting between services and benefits overall.

Less regular grants are being given, one-off financial support is increasingly supplemented by advice and support given.

2. Raising Awareness through informed intermediaries is effective. Promotion needs to be targeted, and benevolent charities need to build risk management into their approach to awareness campaigns.

Raising awareness of benevolence brings results, but needs to be targeted and focused. Most benevolent charities have limited internal staff resource to deal with massive waves of unqualified applications for help. Working through intermediaries who can act as 'informed gatekeepers' is recommended as the way forward, although this route takes a significant amount of time and effort to take hold. The sector is not equipped in terms of fraud-prevention and risk management to deal with the impact of large-scale national advertising and news attention.

Most benevolent charities' audience on their own is too small to expect national PR or advertising campaigns to be effective, and the sector's internal PR capacity is too small to handle joint work which exclusively focuses on national media-focused PR. While PR can be a useful complementary tool, as a stand-alone strategy it would not be suitable for the promotion of benevolence at this stage, especially against a backdrop of limited internal capacity of many benevolent charities.

3. The main challenge the benevolent sector faces is capacity-building. With increased pressure on public finances, and with the gap between rich and poor widening, the importance of the sector is likely to increase, but it needs to meet this need with sustainable, targeted solutions.

Ironically, there is no capacity in the benevolent sector to carry out essential capacity-building work. There is no reliable, continuous CPD-led training provision for welfare staff and volunteers to date (Continuous Professional Development). At this stage, there is no forum which enables Trustees and senior management of benevolent charities to keep up to date with essential developments in social policy which influence their work and forward strategy. Finally, there is no functional best practice development across the sector, which would allow smaller charities to benefit from work carried out by larger charities, and which would be able to reduce the barriers individuals and referrers face when trying to access benevolent help.

Innovation has been largely led by a small group of holistically-minded thought-leaders, some of which have participated in Benevolence Today. As the joint work of Benevolence Today comes to a conclusion, future consortium-work among these thought-leaders is expected. This will increase the capacity of some individual organisations in the sector significantly. There is hope this will spark more capacity-building work in the sector in due course.

The benevolent sector needs to review and enhance its risk management processes if it continues to raise its profile.



Occupational benevolent funds need to rejuvenate their community-links.

4. Any outreach work is more effective for benevolent charities with a wider footprint in society. More people will be eligible for their help, and awareness campaigns bring a greater percentage of new beneficiaries to larger or more general funds than to niche funds. The Benevolence Today final report makes recommendations for the most effective future strategies for such niche funds.

Niche-market benevolent funds, many of which are employer- or industry focused, have three main options to increase their effectiveness to meet the needs of potential beneficiaries. First, the highest potential for raising their profile is to engage more closely with their direct industry or professional community. Focus should be on building links to a younger employee-base in their sector, which would allow the funds to keep in touch with the changing needs people working in the industry have. Second, while direct industry-community-links will be more effective for such niche-charities, there is still a strong potential in collaboration, as resources can be shared with other niche-charities to exchange ideas and experiences.

Finally, capacity-building and service innovation are as important for smaller, niche-benevolent funds as for all other, and such funds should not isolate themselves but seek cooperation with bigger, more general funds where possible, as many have done in the Benevolence Today coalition.

Benevolence Today has opened doors for more partnerships between benevolent charities and other agencies which help people in need.

5. Benevolence Today's work is a first step towards mapping of the benevolent sector, its capacity, its stakeholder groups, communication potential and the policy world around in a new, holistic way. Benevolence Today has been successful in opening doors for the benevolent sector to find a new, recognised position as a partner to work with. This could bring it closer to the charity and social sector and away from its relative position of isolation.

There is immense openness from 3rd party organisations to work more closely with the benevolent sector and engage in partnerships to help people in need more effectively. One of the main barriers to embrace this potential is the lack of 'sector-consciousness' in the benevolent sector itself. Many benevolent charities are relatively insular, mostly due to their internal lack of resource to look far beyond the silo. They consequently have a low level of awareness of what makes their kind of charity unique, and how this unique group of charities relates to the wider charity sector, and social policy outcomes in the UK overall. Some of the research provided by Benevolence Today and its partner turn2us will provide meaningful strategic input for benevolent charities' future thinking.



Conclusion

- The three main challenges for the benevolent sector, as shown in previous chapters, are accessibility, innovation and sustainability.
- It has been shown that access to benevolent funds has been developed and improved significantly through the work of Benevolence Today. This is despite the fact that the size of the task and the means available over the three-year Benevolence Today campaign have been widely at odds.

The direct impact of Benevolence Today through its own work, and the indirect impact through its start-up support for partner charity Turn2us, is significant.

- Benevolence Today partners help 20% more people in need than at the start of the project, and are receiving case referrals from a growing number of intermediary organisations.

The most valuable outcome from the Benevolence Today campaign is the lessons learnt from the dialogue with so many different third party organisations and agencies.

It has allowed Benevolence Today to map the world around benevolent charities in a structured way and to draw an outline of how the benevolent sector fits into society and its social needs at the beginning of the 21st century, almost 150 years after many benevolent charities were started.



Partners in the Benevolence Today Coalition

Actors Benevolent Fund
Architects Benevolent Society
Bankers Benevolent Fund (BBF)
BDA Benevolent Fund (Dentists)
Benevolent Fund of the Institution of Civil Engineers
BOSS Federation Benevolent Fund (British Office Supplies and Services Federation)
BTBS - The Book Trade Charity
Caravan (Grocers)
Charity Employees Benevolent Fund (CEBF)
Chartered Accountants' Benevolent Association (CABA)
Civil Service Benevolent Fund (CSBF)
Commercial Travellers Benevolent Institution (CTBI)
Electrical and Electronic Industries Benevolent Fund (EEIBA)
Elizabeth Finn Care (EFC)
Furnishing Trades Benevolent Association
Independent Age
Institute of Chartered Secretaries & Administrators Benevolent Fund (ICSA)
Institution of Structural Engineers Benevolent Fund
Journalists Charity / Pressfund
Licensed Trade Charity
Maritime Charities Funding Group / Merchant Navy Welfare Board
Musicians Benevolent Fund
National Benevolent Institution
NewstrAid Benevolent Fund aka Old Ben
Officers Association
Rainy Day Trust
Rowland Hill Fund
Royal Medical Benevolent Fund
Solicitors Benevolent Association (SBA)
Support Network (Mechanical Engineers)
St Monica Trust
Sweet Charity (Confectioners Industry)
Timber Trades Benevolent Society
UBA Benevolent Fund (Nuclear Industry)
Unison Welfare



The printing of
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