

# ThirdSector

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## Fundraising

# COME AND SEE

An increasing number of US and UK charities are organising donor field trips, which appeal to wealthy donors who want to see their cash in action rather than go to expensive fundraising dinners. By Mian Ridge

Last January Sylvia Lee, the vice president of a private US charitable foundation, went on what she describes as a “magical” trip to India. But this was no ordinary holiday. The trip was organised by the Global Fund for Women, a grant-making organisation that supports women’s rights projects around the world. Sylvia and 15 of the charity’s other major donors attended the World Social Forum in Mumbai. They spent a day at a project in a slum area that trains women in basic legal rights and visited women’s projects in Delhi. Sylvia returned home having had the trip of a lifetime.

“When I got back, my mind swam with images of India,” she says. “But what made it really moving and memorable was being there with the Global Fund for Women. I’d always believed that its small grants had terrific leverage, but what I saw astonished me. The returns on relatively modest grants cannot be underestimated.”

The trip must have had a similar impact on the other donors. On their return from the two-week visit, every member of the group increased their regular giving: as a whole, the group increased its total giving by 20 per cent. On top of this, a number of the donors included the Global Fund in their legacy plans, every donor on the trip made a presentation to his or her family and friends, and two of them held parties that raised more than £5,000 and brought in 15 new supporters. The trip’s organisers were amazed. Global Fund for Women was set up in 1987, but the trip to India was the first of its kind for the organisation. Not surprisingly, it has been quick to organise many more donor visits.

With its trip to India, the Global Fund for Women had tapped into a major new fundraising movement in America. An increasing number of overseas charities there are taking donors – and potential donors – on field trips. These ‘come and see’ tours, where supporters are shown how their donations will be spent, are becoming important in the increasingly competitive world of US fundraising. Although the number of US charities rose by 9 per cent between 2000 and 2003, charitable giving remained relatively flat at about \$240bn (£125bn) a

## Case study Global Heritage Fund

The Global Heritage Fund, based in Palo Alto, California, is a charity that preserves archaeological ruins and ancient buildings around the world. It organises frequent field trips for large donors. Jeff Morgan, its executive director, says that such trips, which are limited to donors and potential donors of at least \$25,000 (£13,000), tend to be organised when a project is well under way, so that donors can participate in restoration work. “This really solidifies their interest and gets them involved,” he says.

One donor, who serves on the board of a major nature conservancy, went to the Mirador Basin in Guatemala and later donated more than \$400,000 (£208,000), helping to develop the charity’s relationship with the conservancy.

Recently, a group of five Chinese-American families provided more than \$250,000 (£130,000) to restore the Foguang Temple as the result of a trip last June. They were senior executives who had been doing business in China for more than 30 years and were also able to help build a strong relationship with the Chinese government.



Trips allow donors to participate in restoration work



year since 2000, according to the Giving USA Foundation. The profile of individual donors is also changing, and these charity field trips appeal particularly to philanthropy’s emerging class: the wealthy boomers who are retiring earlier, donating younger and are interested in seeing their cash in action rather than going to expensive and often anodyne fundraising dinners.

In most cases, donor field trips are designed to engender long-term donor interest and loyalty rather than generate immediate cash benefits, but sometimes they are set up to raise a specific amount of cash. For example, last October the American Foundation for Aids Research took 25 supporters on an eight-day, 50-mile trek along the Great Wall of China. Participants were required to raise at least \$10,000 (£5,200) to join in the eight-day hike, which generated more than \$275,000 (£143,000). But this was no normal sponsored event: along the way, trekkers met Chinese medical experts and learned about China’s growing Aids crisis.

“The face-to-face interaction with donors helps organisations develop lasting relationships that can evolve over time and benefit the organisation in many ways,” says Leslie Pine, senior vice-president of the Philanthropy Project, a Boston-based non-profit consultancy that advises donors on how to maximise the impact of their philanthropy. “From the donors’ perspective, we believe that site visits are the best way to really get a sense of what an organisation does and how effective it is.”

She adds that the trend for donor field trips is not without its difficulties. “One possible concern from the organisation’s perspective,” she says, “is the amount of time such visits require – possibly diverting the staff’s attention from their organisational mission. We encourage donors to be sensitive to this issue. This includes scheduling visits at times that work for the organisation, and keeping the total number of visits, meetings and other demands upon a given organisation within reason.”

There are other, ethical considerations too. Charities have to be careful about too crude a link between a donation and the donor’s personal expe-