

DO SOMETHING NEW

QUESTIONS TO ASK WHEN SUPPORTING A NEW CHARITY FOR
COVID-19 RECOVERY



WHY NOW?

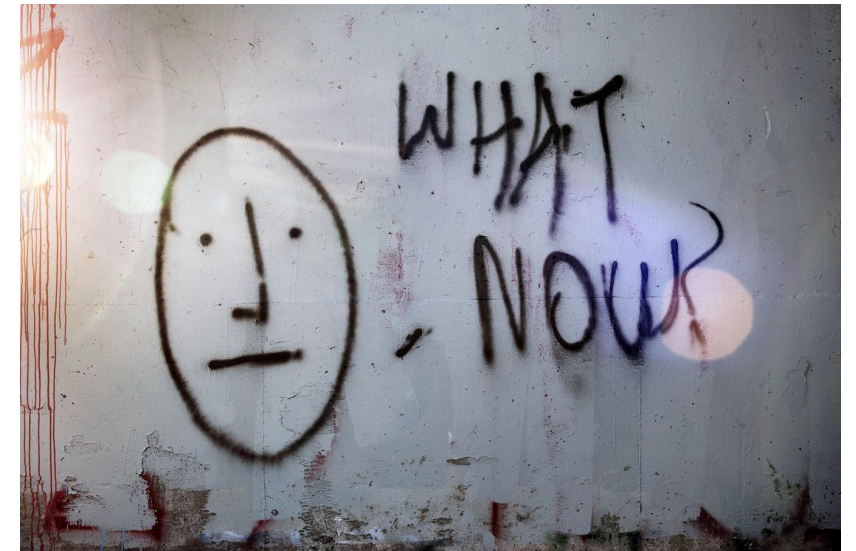
Philanthropic capital can make a difference to the continued delivery of services and support to those who need it most in the relief and recovery phases of COVID-19 response.

For experienced funders, the increase in need accelerated by COVID-19 requires a new way of thinking, to identify and prioritise organisations that are delivering critical services. This requires a commitment to do more and to go above and beyond.

Meanwhile, new funders – those joining the effort by supporting charitable organisations for the first time – are potentially giving at a time when the charity sector is at its most fragile.

For both new and experienced funders, the challenge is the same – responding to the COVID-19 recovery effort will mean giving more and in new ways. It will involve asking tough questions to make sure we maintain the charities we really need to support communities, and the needs of wider society for the long term.

This guide offers some questions that donors can ask to organisations they are thinking of supporting to help frame decision making and prioritisation.



WHAT'S CHANGED?

- COVID-19 is radically changing the charity landscape:
 - New needs are emerging - priorities need to be reassessed
 - Organisations are adjusting and repurposing their services to meet the operating challenges of lockdown and beyond
 - And fundraising opportunities have been diminished as shops and cafes were closed and events were cancelled.
- New Philanthropy Capital [has identified 17 areas](#) where new needs are emerging, highlighting the depth and breadth of the crisis:

Elderly care
Financial security
Young people
Education
Mental health
Disability
Prison and rehabilitation
Sexual harassment and domestic violence
Environment

Housing and homelessness
Children in care
Discrimination
Refugees
Arts and culture
Health and healthcare
International development
Parenting and maternity



USING DATA AND TECHNOLOGY

- Across the philanthropy sector, organisations are working hard to support donors to give effectively into this changing landscape.
- New Philanthropy Capital is [collecting data to pinpoint needs](#) and the disparities that exist across the UK for those who need to access services :
- New platforms are also being designed to encourage collaborative funding and streamline grantmaking, these include:
- - [MAANCH](#) offers connections and processes for grantmakers aligned to the SDGs.
 - [BREVIEW](#) is a single platform for applications from charities matching them to grantmakers and philanthropists



SURVIVE, ADAPT, THRIVE



Individual funders have complex choices ahead of them. They are giving to charitable organisations that need to ensure their own survival, adapt their service provision to meet growing and new needs, and to plan for the future to ensure they have resilience for a world where the changes brought about by COVID-19 are a daily reality.

Through their funding, philanthropists can help to ensure that we don't lose vital services, support communities through the economic and social challenges brought by the pandemic – and make our charity sector stronger for the future.

Reference: <https://www.cafonline.org/charities/resilience>

SURVIVE

To remain alive or in existence.

To carry on despite hardships or trauma; persevere:

To remain functional or usable



- There are some charities we cannot afford to lose over the next few months, as the services they provide to those affected by the pandemic are vital and cannot be offered by other agencies.
- There are also many charities that are facing huge increases in demand because of the pandemic, and need to survive this phase to deliver.
- Naturally, the priority for these charities is to scale up their services. But, this also means they don't have the resources available to fundraise for their own costs.
- These organisations need unrestricted, core cost funding to help them get through the crisis and maintain services for those most in need.

10 QUESTIONS TO ASK SURVIVE



1. Are the services provided by this organisation tackling critical needs brought about by COVID-19?
2. Are these needs likely to extend beyond the immediate crisis?
3. Are other organisations or agencies providing for these needs in this community or area?
4. Has the organisation undertaken a needs assessment to determine how, specifically, to respond to the needs that are emerging?
5. Has the CEO, Board and staff team worked together to develop an appropriate strategy and decision-making framework to enable the organisation to respond quickly and effectively?
6. Are the solutions they have identified cost effective and suitable for the changing operating environment?
7. Have government schemes and support been utilised to best effect?
8. What level of reserves does the organisation have?
 - a. How long can it function?
 - b. How much does it need to operate and to meet the changing needs?
9. Does the organisation have an existing funder base it can turn to for emergency support?
10. Has the organisation considered opportunities for collaboration and partnerships that could help it in the longer term?

ADAPT

To fit, adjust, alter, or modify



- COVID-19 is changing the way that people work, communities function and society interacts. Charities need support to evaluate these changes and consider how to adapt to provide their services safely for beneficiaries, staff, volunteers and the wider community. They need funding to invest in innovative solutions, technology, training and processes to ensure they can continue to meet the new needs that are emerging through the pandemic.
- They also need resources to enable them to monitor and evaluate the changing environment continually so they can respond agilely to the changing context and beneficiary needs.
- These organisations need both restricted and unrestricted funding to re-tool and re-skill and to prepare for longer term needs.

10 QUESTIONS TO ASK **ADAPT**



1. **What changes has the organisation already made?**
2. **What analysis has the organisation done on the likely future needs of its beneficiaries, users or clients? Will it update this analysis regularly?**
3. **What analysis has it done on its own likely future needs?**
4. **Has the organisation identified, specifically, the resources it needs to adapt effectively (e.g. technology, volunteers, staff, premises, safety equipment, training, etc)?**
5. **Has the organisation developed an operational plan for implementing these changes?**
6. **Have cost savings been found?**
7. **Have the risk register and policies been reviewed and what contingency planning has been done?**
8. **Has the organisation developed a fundraising plan to implement these changes through restricted and/or unrestricted funds?**
9. **Have relationships with existing funders been proactively managed to take into account of changes due to COVID-19?**
10. **Has the organisation considered opportunities for collaboration and partnerships that could help it in the longer term?**

THRIVE

*To grow vigorously; flourish
To be successful or make steady progress*



- We already know that society will change radically as a result of the impact of COVID-19. The pandemic is having an impact socially, economically and politically that is unlikely to be reversed. This is happening locally, nationally and internationally. Just as other sectors of the economy are being re-shaped, the charity sector will also emerge from the crisis differently.
- This means we have the opportunity, right now, to re-define how the charity sector works to make sure it is more effective, adaptive, resilient and can tackle injustice and inequality better than in the past.
- Organisations need funding to do this, but they also need partners who can encourage them to think about their future role the landscape, what they will do differently, and how they can best re-frame their activities – alone or with others – to ensure they meet their goals and contribute to a more positive future.

10 QUESTIONS TO ASK

THRIVE



1. What analysis has the organisation done on the likely future needs of its beneficiaries, users or clients? Has this analysis been used to shape the organisation's thoughts on its future role in the landscape?
2. Have the CEO, Board and staff started conversations about the future role of their organisation to meet the post-COVID needs of their beneficiaries, users or clients?
3. Have beneficiaries, users or clients been included in these discussions?
4. Has the organisation re-visited its vision and mission and considered whether it needs updating?
 - a. Do the vision and mission still answer a current need?
 - b. Is the organisation looking to treat symptoms or tackle an underlying problem?
5. Has the organisation considered its future fundraising strategy and are income streams suitably diversified?
6. Are the staff satisfied, motivated and empowered to bring about positive change?
7. Is the organisation open to receiving input from external sources to help it to plan for the future?
8. Has the organisation considered opportunities for collaboration and partnership? How might these partnerships be established to achieve greater efficiency and meet future needs?
9. Has contingency planning been done for similar situations occurring again? Has the risk register been updated?
10. Does the organisation have a process in place to manage change? Who is consulted? How is change implemented?

BUILDING CONFIDENCE

WHERE TO GET MORE INFORMATION

These are uncertain times, but individual funders can help to ensure a positive future for civil society. These questions are designed to help those who are considering funding in new and innovative ways.

You may also wish to consider:

- Using publicly available information to identify organisations you haven't funded before
- Requesting information that is not publicly available
- Meeting with key people at these organisations
- Talking to people who use or have recently used their services
- Visiting a project and talking to front-line staff and volunteers
- Asking other major donors

