

MORGEN THOMAS
Fundraising Consultancy and Project Management

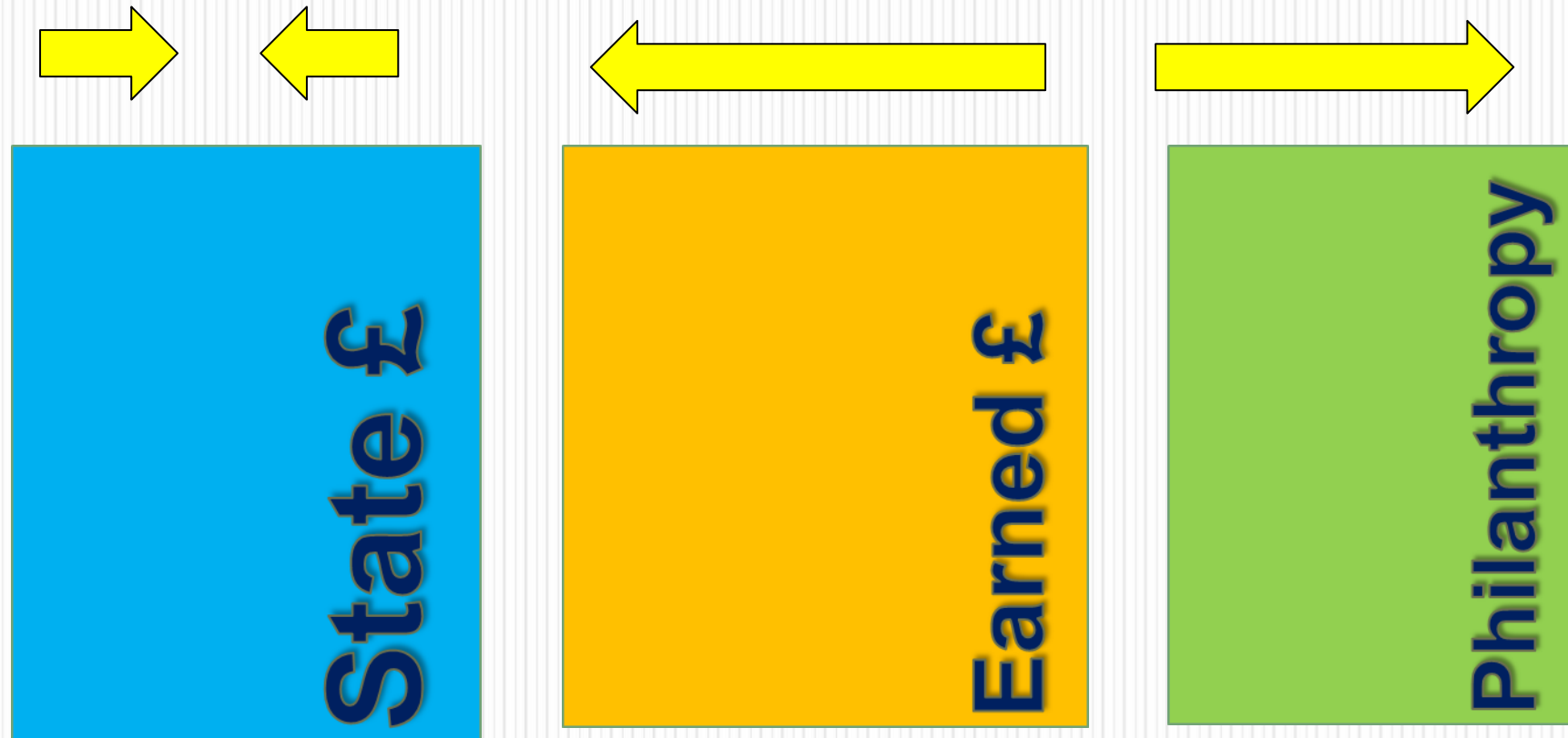
**A Margin of Excellence:
*Philanthropy and Public Services***

Robin Thomas CFRE, Director

MORGEN THOMAS

Fundraising Consultancy & Project Management

Funding services for the public good



MORGEN THOMAS

Fundraising Consultancy & Project Management

Public service philanthropy: comparisons

- Health, schools, FE, HE, cultural services, libraries, museums, youth....
- USA: \$300 billion to public service causes
- Canada: \$10 billion to public service causes
- UK: £10 billion to *ALL* charities

MORGEN THOMAS

Fundraising Consultancy & Project Management

Public service philanthropy: comparisons

- **North Americans earning over \$150k per year give 8x as much to charity as UK counterparts**
- **But the picture is changing...**
- **Earned wealth vs inherited wealth**
- **Giving back**
- **Giving trends to schools & health**

MORGEN THOMAS

Fundraising Consultancy & Project Management

Case Study: Birmingham City Council

The Brief: *To assess the potential to raise funds to complement BCC investment in the development of a new main Library*



MORGEN THOMAS

Fundraising Consultancy & Project Management

Case Study: Birmingham City Council

Our recommendations:

- **At least £15 million available**
- **£8 million from large grant-making trusts and High Net Worth Individuals in gifts of £500k+**
- **Over three year campaign**
- **A new charity must be set up and enlist HNW's, business leaders and opinion shapers as Trustees**

MORGEN THOMAS

Fundraising Consultancy & Project Management

The Proposition

- **A Margin of Excellence: *The Library our community deserves – not just the Library we can afford***
- **The public purse is not bottomless: *We can expect safe and adequate – but excellence requires new ways of investing/working***
- **The public pie is finite: *money for one aspect reduces available investment resources elsewhere***

MORGEN THOMAS

Fundraising Consultancy & Project Management

What we are finding...

- **The proposition is well received**
- **Ways in which the new Trust can enhance library services beyond fundraising are emerging**
- **The opportunity to engage with public service in innovative ways is driving up enthusiasm and the potential for philanthropy**

MORGEN THOMAS

Fundraising Consultancy & Project Management

What next?

- **Trust will be an effective interface with education, business and cultural agencies to stimulate partnerships with library service**
- **Trustees will advise and assist the library service in developing new revenue streams through commercial endeavours**
- **Fundraising and revenue enhancement will continue beyond the completion of the immediate campaign**
- **Library services will always enjoy higher levels of resourcing than what can be provided by the council – at all points of the economic cycle**

MORGEN THOMAS

Fundraising Consultancy & Project Management

What can we learn?

- **This is a different public/voluntary sector partnership – it is not about contracting charities to deliver public services more cheaply**
- **Neither is it about cost reduction – it's about enhancing resources – the other side of the ledger**
- **It is designed to broaden and augment the funding base from the outset**
- **Philanthropists do not expect to fill the breach if the state is seen to abdicate its public service responsibilities – but they WILL invest over and above their taxes if they can be shown the margin of excellence!**