



Handbook





Glossary & Acronyms

A list of terms and acronyms which have a particular definition within the context of the TFN Handbook.

Glossary

Affiliate

TFN Affiliates are civil society organisations (CSOs) responsible for TFN crowdfunding events in their country. They use the TFN event model and report to TFN, but work independently of TFN. They have signed an agreement committing to TFN's Principles and Practices.

Donor

A donor is any individual or business that supports a project at a TFN event.

Event

A TFN event is a live crowdfunding event organised according to the TFN model.

Fiscal sponsor

A fiscal sponsor is a non-profit organisation that offers the benefits of its legal and tax-exempt status to another person, group, or project conducting work in line with the sponsor's mission. Occasionally, the processing of donations made at a TFN event will be handled by a fiscal donor.

Funding target

The funding target is the sum of money that each project aims to raise at a TFN Event. The sum of money is decided by the organising committee and is the same for each project. The funding target is dependent on the local organiser's view of what is realistic.

Match funding

This is when a donation is offered by a person or company on the condition that other donors give an equivalent amount. For example, a business may wish to donate €1,000 at your event on the condition that the audience raises at least a further €1,000. Match funding is a good way of encouraging attendees at your event to donate.

Minimum pledge

This is the lowest sum that a donor may offer to a project. It is set by the event organisers, based on what they believe is reasonable for their audience.

Non-profit organisation

A non-profit organisation is sometimes referred to as a charity or a non-governmental organisation (NGO). It is often shortened to 'non-profit'.

Pitch

This is the six-minute presentation given by each of the non-profit organisations at a TFN event. The pitch should explain the problem they want to tackle, their solution, and their request for financial support.

Project

A project is the piece of work presented by a non-profit organisation at a TFN event, for which they are seeking funding.

Pledging session

This is the part of a TFN event where attendees may offer donations or 'pledges' by raising their hand, giving their name, and stating the amount they would like to give.

Sponsor

This is the TFN donor who nominates a project to pitch at a TFN event. If their project is selected, the sponsor helps the non-profit organisation to prepare for the pitch. At the event, the sponsor introduces the non-profit and the project and they initiate the pledging session for that project.

Acronyms

CEE

Central and Eastern Europe

CF

Community Foundation

CSO

Civil society organisations

HNW

High net worth (individuals)

NGO

Non-governmental organisation

An Introduction to TFN



Transforming lives
through
live crowdfunding



Welcome to The Funding Network, or as we usually call it, TFN – pronounced 'tiffin'.

Welcome too, to our first official TFN Handbook, which we have produced to make it as straightforward as possible to run one of our events.

The TFN model for live crowdfunding events has been tried and tested by 100s of people and organisations over the last 15 years. Any challenges we faced at the beginning and any mistakes we made have fed into our learning process; all our combined experiences have gone into producing this TFN Handbook.

We hope that any organisation looking to adopt the TFN live crowdfunding model and benefit from belonging to the TFN global network will find the TFN Handbook invaluable. We hope the handbook proves useful to gain a deeper understanding of the TFN model, and the value of live crowdfunding in bringing people together to make positive things happen in their communities.

The first part of this handbook provides a short background to TFN and TFN International and the Affiliates Programme. The second part of the handbook offers a step-by-step guide on how to plan and run a live crowdfunding event and what steps you need to take after an event.

Every TFN event is different, so we are keen to point out that 'How to Organise a TFN Event' should be read as a guide rather than a strict instruction manual. Please feel free to adapt it, within the boundaries of the core principles agreement, to suit your situation and requirements – after all, it's important that your event is enjoyable for everyone involved, so they leave with the desire to come back again next time!

In addition to the handbook itself, there are some supporting documents that will help with the different stages of organisation, for example, a typical event invitation, an event schedule, and a spreadsheet for donor pledges. Like the handbook itself, these are

available to download from our website:
www.thefundingnetwork.org.uk/supporting-documents??

On the first page of the handbook, you will find a list of acronyms and a glossary of words that have a particular meaning in the context of TFN.

The addresses of all our TFN Affiliates are included on the last page of the handbook.

We would like to acknowledge our funders – the Charles Stewart Mott Foundation, the Frederick Mulder Foundation and the Marie-Louise von Motesiczky Charitable Trust – to whom we are grateful for their ongoing support.



Marie-Louise von Motesiczky
Charitable Trust

An unexpected outcome from our last donor circle event was that two of the local organisations that presented made wonderful connections, which led to local Roma children who had never been to a theatre or eaten in a restaurant having those experiences."

Beata Hirt,
Executive Director, Healthy City Foundation at Banksá Bystrica, Slovakia



TFN founder Fred Mulder at a TFN event

A brief history of TFN



TFN was founded in 2002 by art dealer, Dr Frederick Mulder and three of his friends, Sue Gillie, Paul Welland, and Polly McLean.

They understood that by pooling their resources, they would achieve more and have a greater impact on the issues they cared about than they would on their own.

At the time, there was no such thing as online giving sites and the term 'crowdfunding' had not even entered our vocabulary. The tradition of a giving circle or donor circle had been popularised in the US: it is simply a small group of parents, neighbours, or members of a church or community association, for example, who come together to raise money or share skills in order to get a job done.

The logical step for Fred and his friends was to seek out like-minded individuals and persuade them to join them. That's how The Funding Network was born.



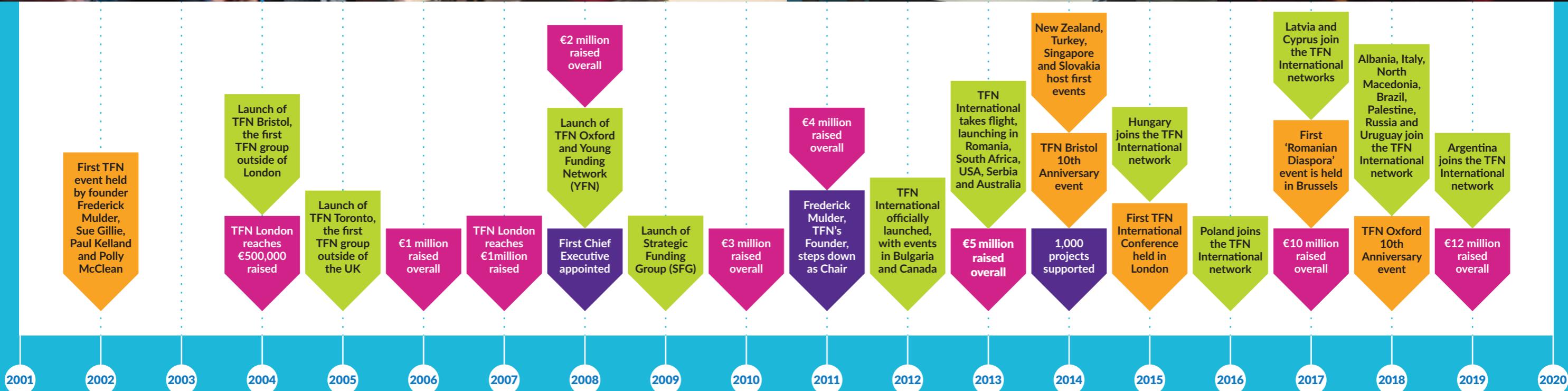
With the aim of creating an informative, unpressured, focused and sociable way of fundraising, Fred and his friends held the first TFN event on 16 March 2002. It was a huge success, raising a total of €60,000 for nine different projects and TFN became the UK's first formally constituted 'giving circle'. That first event, held at the Royal Institute of British Architects went on all day, but subsequent events were more low-key – one was even held in a doctor's waiting room!

By 2006, the term 'crowdfunding' had come into popular use to describe websites such as Kickstarter and IndieGogo. These websites combined online social networking with the concept of 'getting funding from the crowd' as the JustGiving charity fundraising website had achieved. At TFN, we realised that what we were doing had tapped into a certain zeitgeist – but with a fundamental difference: it was live.

Exhilarated and inspired by their experience of a TFN event, attendees from outside London started to use the live crowdfunding model elsewhere. Over the first ten years of our existence, there were TFN events in Bristol, Cambridgeshire, Devon, Kent, Leeds, Norfolk, Oxford, Scotland and Wales, as well as Johannesburg and Toronto.

While TFN had garnered international interest and events had already been held in Canada and South Africa, it was not until 2012, with support from the Charles Stewart Mott Foundation, that TFN International was formalised. The first TFN International event was held in the Bulgarian capital of Sofia on 8 May 2012. By 2018 the TFN International network embraced more than 20 countries and had raised more than €4.2 million for at least 800 projects.

Key Milestones in TFN's history





What is so special about TFN?

From the outset, our ethos at TFN has been to develop a culture of giving that is open, transparent, and respectful, both for donors and those who seek funding.

In the face of all the worrying developments across the globe – climate change, the rise of populism, threats to democracy, and the growing refugee crisis – our mission to engage the ‘mass affluent’ in charitable giving feels more meaningful than ever.

Something extraordinary happens at every TFN event; people from diverse backgrounds and lifestyles, from all levels of wealth come together in a safe, unpressured environment and have face-to-face conversations on an equal footing. Where else would you get an ex-offender talking to a political speechwriter, for example? Or an investment banker talking to a body-positive doll-maker based in Cuba?

From our starting point of enabling people to have a greater impact than they would have on their own, TFN has evolved into something that does much more. It's true – TFN events are a powerful tool for fundraising, but they're also about learning and having fun at the same

time. Events enable people to pool resources, to raise awareness about philanthropy, about social and environmental issues, and to find innovative solutions to some of the most challenging problems. Donors become more closely involved with charities and community organisations and, as a consequence, become more invested.

From the perspective of the charities, not only does TFN open up new avenues of funding, but we help them to establish new relationships with potential volunteers. In fact, many organisations tell us that the support they get and the skills they learn are just as valuable as the money raised. Public speaking, making grant applications, and softer skills such as connecting with new donors, are all valuable assets for grass roots organisations.

We live in a time where it is increasingly difficult to work out what is true, and what is real, so it is tough for minority groups to make their voices heard. When a representative from a small organisation is invited to pitch at a TFN event, they have a rare opportunity to tell their story in their words on their terms, without anyone putting their spin on it. For donors, they have an equally rare opportunity – to drive positive social change.

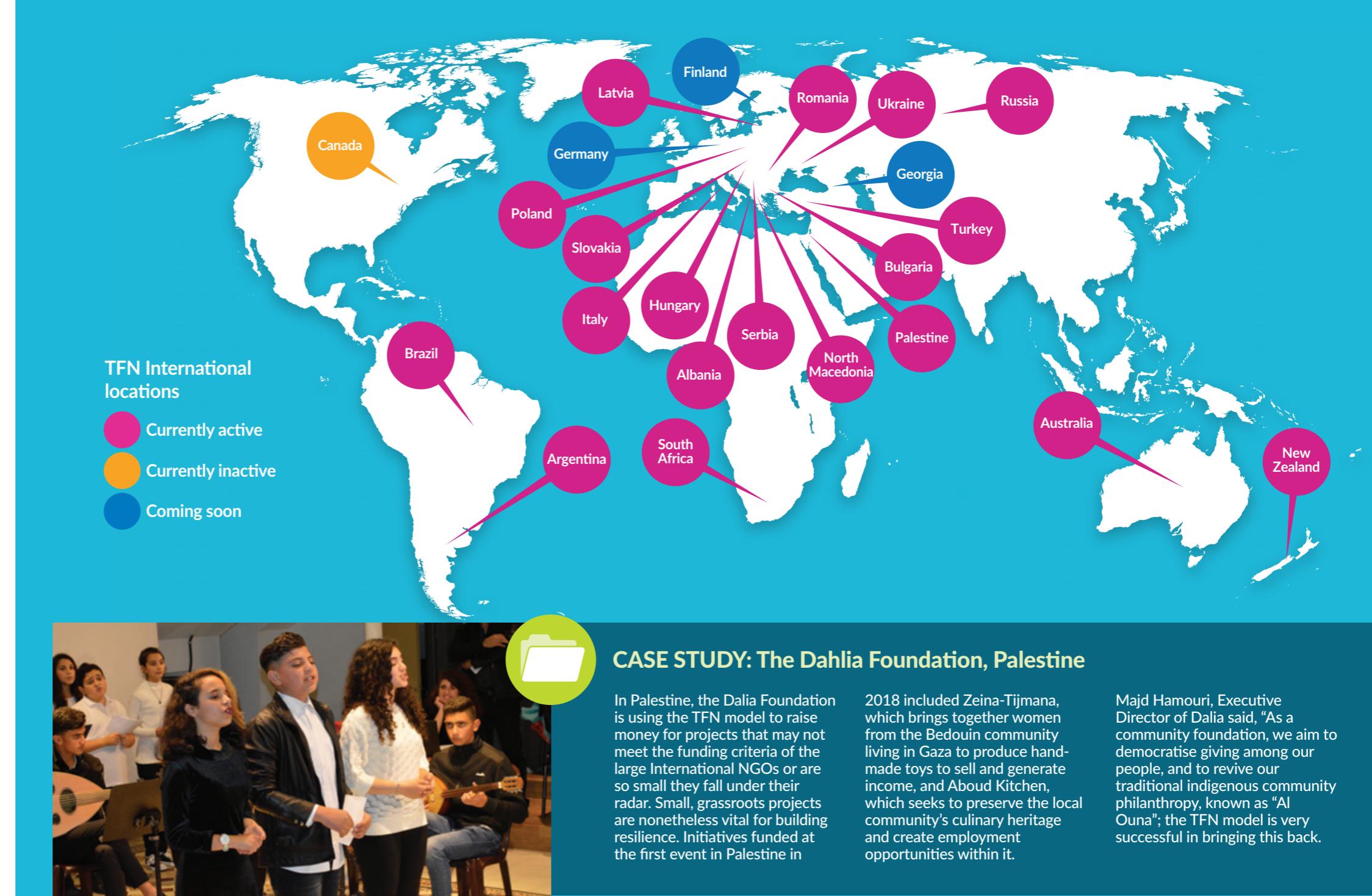


At every TFN event, the audience is presented with a wide range of projects, often tackling vital niche issues that are challenging to raise funds for. Some examples of projects that have pitched at TFN events include:

- **Britain Has Class** – grassroots campaign fighting class inequality and structural classism
- **TERN** – supporting entrepreneurial refugees to thrive in the UK through the power of their own ideas;
- **The Orchid Project** – working to end Female Genital Cutting;
- **Prisoner Radio Association** – seeking to reduce reoffending rates through the power of radio;
- **Gendered Intelligence** – supporting young trans people facing discrimination and social isolation, and
- **Sarah's Rural Libraries Fund** – promoting literacy and equality in the indigenous communities in Northern Peru

Each of these organisations is tackling issues that are uncomfortable for some people; issues that challenge our humanity and our understanding of who we are. We fervently believe that we should never flinch from difficult topics at TFN – precisely because our events offer a vital forum that offers the rare chance to open people's minds.

When people ask what makes TFN different from other crowdfunding organisations, the answer is simple: every TFN event is live. Nothing is more powerful to break down misconceptions than direct conversation between people who need help and those in a position to do more.



How TFN International works



TFN International succeeds because of our TFN affiliates. Affiliates are typically registered, national non-profit organisations working to enable philanthropy in their country.

We currently have active affiliates in Albania, Argentina, Australia, Brazil, Bulgaria, Hungary, Italy, Latvia, North Macedonia, New Zealand, Palestine, Poland, Romania, Russia, Serbia, Slovakia, South Africa, Turkey, and Ukraine, with new ones joining us every year.

Affiliates need to fulfil three basic criteria:

- They share TFN's mission to support social change through increasing philanthropy
- They have the capacity to deliver events
- They have the legal right to collect money from donors and to re-grant funds

Our affiliates are typically civil society organisations (CSOs) that are well connected across both commercial and



charitable sectors. They're equipped to carry out due diligence on potential grantees and to make grants, so it is quite straightforward for them to adapt the TFN crowdfunding model and spread it to smaller community CSOs throughout the country with some initial support from us.

All these CSOs share TFN's passion for live crowdfunding and are interested in developing it further, learning and sharing their ideas. Being a TFN affiliate means the organisation has a recognised, formal relationship with TFN, which means there are expectations on both sides.

Through the TFN International Affiliate programme, TFN is sparking a worldwide democratic giving revolution. Hundreds of people come together at live events every week – from Brasov to Budapest, from Moscow to Melbourne, Toronto to Turin – people are working together to create lasting social change in their communities.

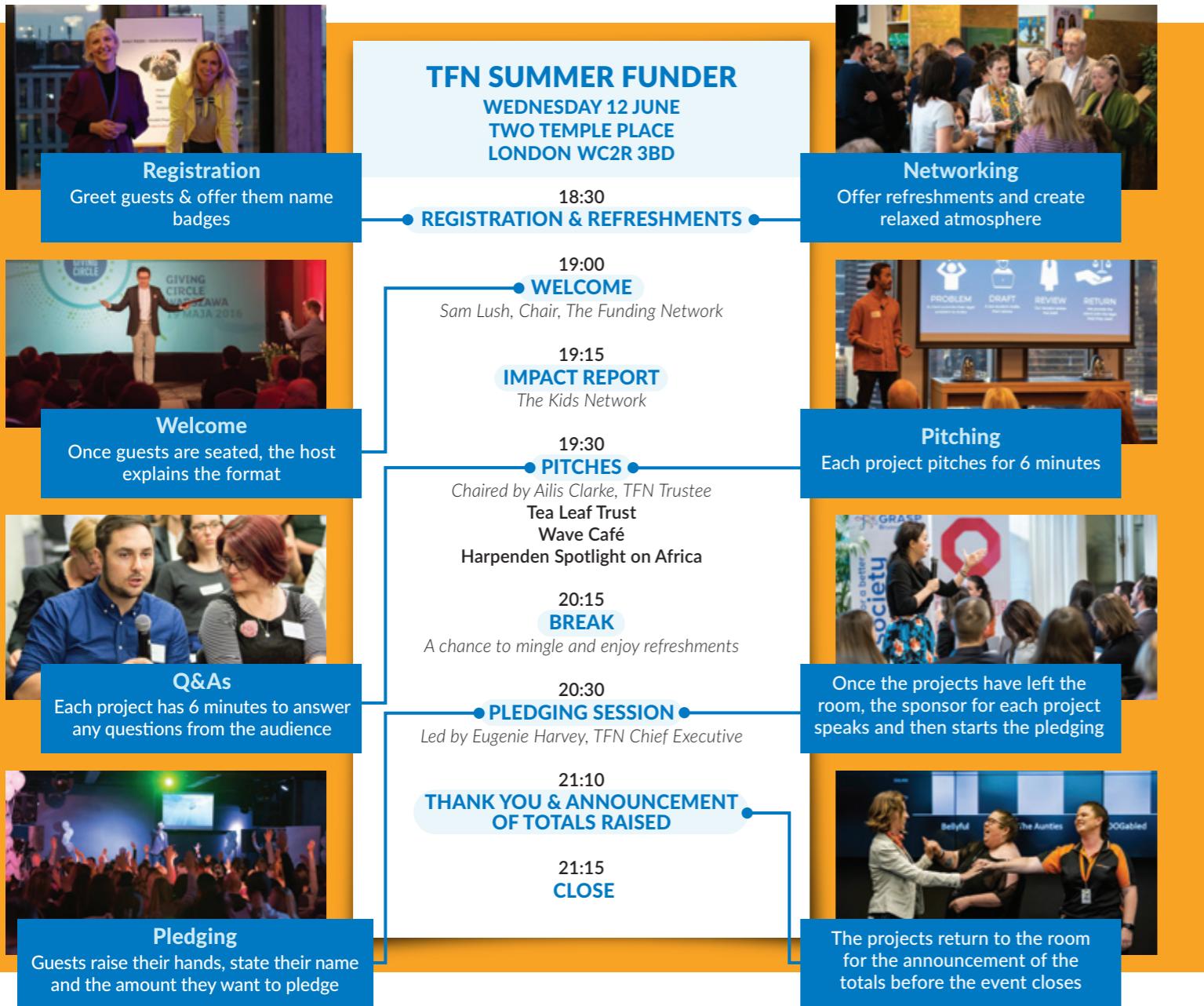
The addresses for all our TFN Affiliates are provided at the back of this handbook.

What we find exciting about TFN's donor circle model is that it opens up new possibilities for the non-profits we support. Following our first event in Auckland, one donor came forward and provided a further NZ\$ 40,000 of funding for two of the organisations that presented at the event – that's an additional NZ\$ 80,000 in total!"

*Hilary Sumpter,
former Chief Executive, Auckland Community Foundation, New Zealand*



Sample TFN Event agenda



The TFN guide to organising a live crowdfunding event

This guide to organising your first TFN event assumes you've already attended an event and are familiar with the format – the sample event schedule illustrated on the opposite page will serve as a reminder.

The guide also assumes that your organisation has the capacity to deliver the core processes, which, in brief, involve:

- **Coordinating** the selection of projects to present and carrying out due diligence
- **Building an audience** and promoting the event
- **Delivering pitch training** to the presenters
- **All the logistics** related to the event (venue, set-up, catering, etc)
- **Processing the funds** raised at the event
- **Reporting back** to all those who pledge at the event

We expect your organisation to be well placed to reach out to individuals and organisations that will support you in hosting a successful pilot event. Assuming you have all these things in place, here's what we suggest you do next...

Planning & Logistics

When you first start planning a TFN Event, there are many questions you need to ask yourself:

- Why are we holding a TFN event? What is **our vision**?
- How will we **manage** to get everything done?
- Who should form the **organising committee**?
- **When** should we hold our event?
- **Where** should we hold our event?



- How will we cover the **expense**?
- How shall we select **which charities** to support?
- **How many charities** should we select?
- What will the charities' **funding target** be?
- At what level should we set the **minimum pledge**?
- Who is our **target audience** and how will we attract them to our event?
- How will we **handle the funds** raised at the event?

There are many decisions to make and they are all interrelated, so it is best to have an organising committee and work through all the decisions at the same time, rather than taking each decision separately. This will enable you to find the best approach for your locality and circumstances.

But first of all, the question you need to ask yourself is: why are you doing this?

I have found that among its other benefits, giving liberates the soul of the giver.

Maya Angelou

The TFN model has been successfully adopted by seven community foundations in Bulgaria. One of its main benefits is building acceptance of diversity and enhancing social justice in communities. This is because local donors can communicate directly with organisations addressing such issues. For example, we have been able to challenge perceptions of the Roma community and increase community support for projects that address their needs."

Monika Pisankaneva,
Community Foundations Programme Manager,
Workshop for Civic Initiatives, Bulgaria

What is our vision?

When you start planning a TFN event, the most important and often most difficult thing to find the answer to is: why are we doing this? You may think that the answer is obvious, but it may not be so obvious to everyone around you.

Your vision and your reasons for planning an event need to resonate with everyone involved, so this question demands close scrutiny. Our overarching vision at TFN is to increase the amount of funding available to charity by increasing the number of donors, but you need to be clear about exactly what you hope an event will achieve.

Having an authentic and compelling answer to these questions will inform everything else – from persuading people to form an organising committee to ensuring that people attend the event and give their money away. Everyone will want to know why they should get involved and what difference your event will make.



Roma performers at a crowdfunding event in Sliven, where one of the projects focused on popularising Roma culture

CASE STUDY: Challenging Issues –The Sliven Community Foundation, Bulgaria

The Sliven Community Foundation in Bulgaria uses the TFN model to shift perceptions of the highly marginalised Roma community. Sliven has one of the largest, most disadvantaged Roma neighbourhoods in Bulgaria and it is badly stigmatised. The foundation has adapted the TFN model to address this by introducing requirements that selected projects do not discriminate against the Roma community and, if possible, they demonstrate inclusion of the community; at least one project that presents at every event must directly benefit the Roma community. When a local folklore festival was seeking funds, for example, the project had to demonstrate how it tried to include Roma folklore in addition to Bulgarian ethnic folklore.

The Sliven Community Foundation has organised 10 successful events and supported 35 projects, raising €80,000 in total.

Many of our partners in Central and Eastern Europe tell us that one of their main aims is to rebuild trust and strengthen civil society. In Australia, the vision is, in part, to channel the benefits of a strong economy into social innovations that benefit the whole community.

Consider the needs in your specific location and how a TFN event would address them? How will an event succeed where nothing else has?

You may want to **increase the number of donors or supporters** for your own organisation, for example. A live crowdfunding event can be a great way to cultivate a new pipeline of potential donors and supporters.

Perhaps you want to **raise awareness** about the problems your community faces? A live crowdfunding event is the ideal forum for people and businesses to meet one another and for organisations tackling local problems to find potential sources of funding or practical support.

Possibly, you live in a place where there's **little or no government or social support** and you realise that, unless your community comes together and pools its resources, there will be people living in your country who will suffer intolerable hardship.

Is there a **gap in the market** where you are? Perhaps nothing like 'live crowdfunding' exists where you are but there are people with money and resources who want to get involved in philanthropy. In this case, live crowdfunding is a great introduction to philanthropic giving, especially as there is no pressure to give money and the entrance level is low. Many people attend live crowdfunding events so they can find organisations that they can get involved with and help.

Maybe you think a TFN event would be a great way of encouraging your community to be **more inclusive**. Live



This Romanian host has the audience captivated at this event in Cluj

crowdfunding events are notable for the diversity of the people who attend them; just by inviting people to come and listen to the presentations and learn about the problems in your community and the solutions to them, you can make a difference.

If you want to **promote philanthropy** generally, holding a live crowdfunding event is the way to go, with its potential to engage a large audience of people (often high profile) and organisations from across a range of sectors – it is exciting and dynamic and has the potential to attract media coverage and publicity.

You may be planning an event for one or all these reasons, or maybe for none of them! Whatever the case, it is important that, firstly, you and your co-organisers know exactly why you're doing it and secondly, that it connects to the overall mission of your organisation (or organisations). Until you have sorted out these things, there is no point in thinking about anything else.

The TFN crowdfunding model is an ideal mechanism for us to acquire, retain and cultivate new or existing donors; to mobilise resources and to build capacity in local non-profit and informal groups; and to stimulate social change through a collective impact approach. The crowdfunding event illustrates our mission to connect the needs and resources of Cluj towards improving the life of its inhabitants.”

Simona Serban,
former Executive Director, Cluj Community Foundation, Romania

How will we get everything done?

There's a lot to do to prepare for a live crowdfunding event – in a relatively short period of time. The only way to get everything done is with lots of help!

Our first advice to new groups is to invite a small group of people to form an organising committee. Once you have formed an organising committee, you should meet to create a timeline and to delegate tasks. The organising committee meets regularly throughout the planning process to keep track of how everything is going. See the Sample Timeline on the next page.

Who should I ask to form an organising committee?

Once you have a clear vision for your event, it will be easier to persuade others to form an organising committee with you.

The people you approach will be crucial to the success of your TFN event. Their role is to help with all the key decisions, to build an audience and to cover costs by reaching out into their own networks. You should think of people with an interest in philanthropy (ideally as donors themselves), people with influence (in the media, in businesses, or within the non-profit sector), and people who you know will get things done.



CASE STUDY: Building an Audience – The Florianópolis Community Foundation

The first question new groups ask us is: how do we get people to come along to our event? In November 2018, The Florianópolis Community Foundation in Brazil held their first event; here's how they set about building an audience.

"First of all we invited our directors and the members of our advisory board (30 invitations) and they were each asked to invite one other person (30 invitations). Then we asked each of the three selected non-profits to invite two guests (6 invitations).

We have useful resources to help you introduce them to the concept of live crowdfunding, such as this short film: www.youtube.com/watch?v=kIShFI1I7c0&feature=youtu.be

You could show them photos from events, which you can find on our website and on the TFN Affiliates Facebook pages, listed at the end of this handbook.

By involving others in the planning process from the outset, you'll not only create an event that reflects their interests and needs, but you'll give them a stake in the project. This means they are more likely to reach out to their own personal and professional networks to make sure the event is a success. In our experience, this is key.

When should I hold an event?

Once you have formed an organising committee, we suggest you allow 16–20 weeks to organise your first event. Any longer than that and you'll lose momentum; any shorter and you'll struggle to get everything done. In our experience, spring and mid-late autumn are good times for events – avoiding holidays and other celebrations.

Once you have your date and venue sorted, we suggest you write a timeline of what you need to do and when. See the Sample Timeline on the next page.

Sample Timeline: Planning a TFN Event

No. of weeks before event	Task	No. of weeks before event	Task
16-20 weeks	1st meeting of working group – logistics and planning meeting <ul style="list-style-type: none"> • Agree possible dates for the event. • Agree possible venues. • Brainstorm possible funding sources to cover costs of venue and catering. • Agree how to find and select charities, including the need for each to have a sponsor. • Send minutes of meeting to all committee members with actions. 	2-4 weeks (cont.)	<ul style="list-style-type: none"> • Send an update to the organising committee & remind them of their actions. • Allocate roles at the event. • Organise a photographer to take photos at the event. (Do not make public any photos of donors without their permission.)
12-14 weeks	<ul style="list-style-type: none"> • Confirm date and venue. • Confirm how costs will be covered and prepare a budget. • Start to put your guest list together. • Send committee members an update and reminder of their actions. 	1 week	3rd meeting of working group: final confirmation of roles at the event; final check of logistics; final push for guests <ul style="list-style-type: none"> • Prepare information packs for attendees. These include an agenda, pledge forms, project applications, and information about how projects were selected and how money will be handled (ie. any deductions you will make). Acknowledge any organisations / individuals that donated anything to the event. • Put all the charity presentations into a single presentation document and create slides to introduce all speakers. • Create a spreadsheet to track pledges as they are made on the night. • Prepare name badges. • Confirm audience numbers, catering requirements and running order with the venue / sponsor. • Email all confirmed attendees with final details of the event and include 2-page charity applications or a link to them on your website. You may wish to offer the possibility of pledging in advance if they are not now able to come.
10-12 weeks	<ul style="list-style-type: none"> • Send a "Save the date" email to all guests and the organising committee to send to their contacts. Also, call for applications, if you are having an open call. Include event details and link to further information about TFN, including one of our short films. • Post detailed event information on your social media outlets. 	On the day of the event	<ul style="list-style-type: none"> • Make a checklist of everything you need to take to the event: eg. a stop watch; information packs; alarm bell; name badges; photography notice; spare pledge forms; box of pens; USB stick with presentations – and take them to the event! • Rehearse charities at the venue on the afternoon. • Set up the venue and help charities to set up their stands. • Test presentation and spreadsheet software.
6-8 weeks	<ul style="list-style-type: none"> • Send an invitation email. Include all details of the event (including a map to the venue), link to further information about TFN and how to register their attendance. • Start to gather RSVPs. • Send an update to the organising committee and remind them of their actions. 	6 weeks	Second meeting of organising committee: charity selection <ul style="list-style-type: none"> • Select which charities to present at the event.
2-4 weeks	<ul style="list-style-type: none"> • Meet with selected charities. Go through their presentations and provide coaching. • Send out second invitation ('places are filling up fast'). Announce the charities that will present and attach their applications. 		



Pretty much any venue can be made special for the evening with the right lighting and decoration, as was the case in Warsaw, Poland

Where should we hold our event?

Cost is a major consideration when it comes to choosing your venue and thinking about catering. (See below, **How Can We Minimise Our Costs?**) You will need a venue that can comfortably seat 70–100 people in a cinema-style arrangement. Ideally, it will have an additional separate space where people can have drinks and mingle before the presentations and during the break.

The presentation area should be equipped with a screen and a projector, and if it's large, you may need to use microphones. It is also important that the venue is central, easy to get to and has access for people with disabilities. Historic buildings, art galleries and other civic institutions are good choices of venue for all these reasons, but college lecture theatres, hotels, large private homes and business offices also work well. An interesting venue that people want to see can be a great draw in getting people to come along!

How can we minimise our costs?

Apart from your time (we don't underestimate the cost of this, but hopefully it is covered in other ways), the main costs involved in planning a crowdfunding event will be venue hire and catering.

You will often find someone is willing to donate the use of their venue, and occasionally the catering as well. Business partners (especially banks and law firms) are often helpful in this regard. Most of the events in London are hosted by professional firms who are pleased to have this kind of event and audience in their offices. Hopefully, you can also get the food and drinks donated or provided at cost. The event can be a great opportunity for a supplier to showcase their goods and services.

If you can't get these things free of charge, members of your organising committee may be able to help to cover the costs; if you hold the event in a venue where you can bring your own drinks and food, you can cater for people relatively cheaply.

Additional costs may arise with the processing of funds (ie. receiving the pledges, banking them, applying for tax certificates and making grants to the charities and credit card fees), but these are generally covered by deducting a levy (maximum 10%) on funds pledged. ([See p?? 'How Should We Process Funds?'](#))

Whatever you do, it is crucial to be completely transparent about what the costs are and how they are being met.



CASE STUDY: Making it Memorable – The Community Foundation of Colonia, Uruguay

Live entertainment, an unusual venue, local food and drink, celebrity presenters – all great ways to tailor your event to your local community and make it more memorable. But one of the funniest and most memorable events for us was organised by the Community Foundation of Colonia in Uruguay.

A popular local character called Napoleon led the pledging session with the help of his three sons. Napoleon had prepared special gift boxes to be awarded to the first people who pledged to each project. The gifts in the boxes included a pumpkin, a chorizo sausage, cheese, lettuce, and a hat. In addition, three local restaurants each donated a meal for two and for each project these were awarded by Napoleon to someone who made a pledge.

How should we select charities?

When you first start planning a TFN Event, there are many questions you need to ask yourself:

- **Transparency** – You need to publicise your selection criteria and decision-making process
- **Involvement** – Involve committee members and donors in the selection process
- **Variety** – The audience needs to have some choice about where to focus their attention

We recommend you involve a number of people in the selection process so it is collaborative and impartial. In established TFN groups, charitable projects are often proposed and selected by regular donors. This ensures that the projects reflect our donors' interests and establishes the important TFN principle that our events are 'donor-led'.

For your first event you won't have established donors, so we suggest asking your organising committee to nominate projects. In every case, applications need to be made using the standard two-page application form (in the Support & Training folder of the TFN website). If you are a community foundation or similar, you may be able to make a longlist of potential local projects and then ask the organising committee either to create a shortlist or decide which projects will present and even to sponsor the selected projects at the event.

TFN's selection criteria for the organisations we support are broad and flexible. The only compulsory criteria for a project to be selected are that it is run by a not-for-profit organisation and its aim is to create positive social change. We do not fund anything political or religious and neither do any of our affiliates using the TFN model.

Three useful aspects to consider are:

- **Size** – You want the funds you raise to be meaningful to them, so choose charities with a turnover no more than 100 times the funding target. If the charity has a funding target of €5,000, for example their turnover should not exceed €500,000.

- Audience profile** – Think about which geographical locations, which beneficiaries and what issues will motivate your audience to donate?
- Your context** – Which charities and which causes will benefit most from receiving new sources of funding?

The important thing is that you end up with a handful of interesting, diverse projects that will appeal to a wide range of people. The optimum number of charities presenting at each event is three or four. If there are fewer than three charities, there is not enough choice; with more than four, you risk overwhelming people with information and it could lead to a very long night!

Who should we invite to our event?

This is another point where having a clear vision will be crucial to your decision making. Focus on inviting people who will be motivated by your vision and who will respond to the issues and cases you will support at the event.

Most of our partners have an existing donor base, or are connected with other organisations that have one; this

is obviously the place to start. The people on your organising committee play an important role, because they each have a network. Hearing about something from a friend or colleague you trust is more persuasive than seeing an advertisement or receiving an email out of the blue.

Provide members of your organising committee with simple and effective communications that they can adapt and send – and email invitation is ideal.

Other routes to building your audience include:

- The selected non-profits and their sponsors – encourage them to bring supporters, trustees, volunteers, friends and donors.
- Corporate sponsors and other partners helping you to organise the event. If a business is providing you with the venue or other support, ask them to promote the event to their staff. Perhaps staff members could volunteer at the event? People are more likely to come to something if they have a role.
- Your family, friends, colleagues, and former colleagues.



CASE STUDY: The Birth of TFN Families – TFN Australia

When a Sydney-based children's centre was winding down and needed to distribute unspent funds to other organisations that helped children aged 0–5 years, TFN Australia jumped at the chance to partner on an event with them. They decided to use the unspent funds to match funding at a TFN event for families and the idea of TFN Families was born!

One innovation was to form a TFN Junior panel of six 9–12-year-olds, who agreed the four key things that every child needs for a happy thriving life: shelter, love, play, and education. They then scored the applications on these criteria and their results fed into the final selection.

How shall we handle the funds?

Typically, our affiliates are organisations that are used to accepting donations and re-granting them on to other charities and non-profits, so the administration of funds from a live crowdfunding event will be second nature. They are also able to provide donors with tax certificates and receipts. This is important, because in some countries, donors are allowed to claim tax relief on charitable donations.

If your organisation is not set up in this way, or is small and without the capacity to do this (processing donations from 50+ donors to multiple organisations is quite a task), then you'll need to consider other options as part of the planning process. Options include working with another organisation or entering into a fiscal sponsorship arrangement as we have done in the US and in Finland.

However you decide to process donations, complete transparency is crucial for maintaining the trust and support of both potential donors and charities. Your organisation must obtain the appropriate legal status so it can be clearly communicated to all concerned. See also p??, After The Event: Important Notes on Handling Funds.

Before the pledging session, the host did a brief Q&A session with three of the Junior panelists about their experience of selecting charities, which proved powerful. Some amusing challenges were introduced as well: the Pyjama Foundation, one of the pitching organisations, promised to pledge AU\$ 100 if everyone in the audience who wore pyjamas would pledge the same.

This kind of themed event is great for generating more press coverage and it proved so successful in that first instance, that TFN Australia plans to organise more events catering for families in the future.

If you are concerned about this in any way, please talk to us about it.

Are funds available to help us get started?

We offer Starter Grants to non-profits that share TFN's mission to increase funds for organisations working for social change. If representatives from your NPO have attended a TFN Affiliate live crowdfunding event and received training around the TFN model, you can apply to TFN for a Starter Grant.

Starter Grants are of €1,000, which may be used to cover some of the costs of organising a live crowdfunding event (eg. catering); promotional costs (eg. filming an event for future promotional use), and to establish the practice of match funding at your event. Starter Grants are available for the first three events (ie. €1000 per event). A separate application must be received for each event and a short report is required three months after the event has been held. Templates for both are available from TFN. Starter Grants are funded by the Frederick Mulder Foundation.



Reporting to TFN UK

We ask that all groups using the TFN live crowdfunding model provide TFN UK with short reports about their events, which should include the following details:

- The date it was held
- The number of people who attended
- The number of people who pledged
- The number of projects presented
- The names of the organisations and brief (one or two sentences) descriptions of their work
- The amount raised for each project
- The total amount raised at the event
- The amount deducted (if any) by the hosting organisation towards costs.

These reports are important so that TFN UK can aggregate the total impact of all groups worldwide and share that information with new and existing affiliates.

Support, Delegation and Communication

Once all the difficult decisions have been reached and you have addressed all the planning logistics for holding your



live crowdfunding event, it is time to focus on the different people involved. You will need to delegate roles to colleagues and members of your organising committee and support the people who will be presenting the selected projects on behalf of their organisations.

How can we help charities make the most of the event?

Presenting a project in front of an audience of positively disposed influential people is a fantastic opportunity to raise awareness and discuss the issues that the charity is trying to tackle. Many non-profits who have presented at TFN have gone on to have lasting relationships with donors they met at our events.

While it is exciting to be asked to give a presentation, it can be a daunting prospect; there is so much to gain if it goes well. To help the charities make the most of this opportunity, and to make your event as successful as it can be, you need to support the charities in preparing their presentation – both with content and delivery. We provide detailed materials on how to do this in our Support & Training folder online.



CASE STUDY: A TFN event is only the beginning – Jamie's Farm

Presenting at a TFN event can open up a world of possibilities beyond the funds raised at the event and this was very much the case for Jamie Feilden of Jamie's Farm in the UK.

Jamie's Farm works with disengaged and at-risk teenagers from poor urban areas and gives them the opportunity to experience life on a farm and the support of dedicated counsellors and youth workers. It grew out of Jamie's experience when as a young school teacher in London, he took some of the lambs from his family's farm to the school and saw the incredibly calming effect the lambs had on the students. This evolved into taking groups of students to stay at his family's farm near Bath, and eventually he established his first farm to host groups of young people for residential visits.

When Jamie Feilden first pitched at TFN Bristol (UK) in 2009, his charity didn't have a farm, just a vision. At that event, he raised €5,000 towards that vision. Jamie

pitched at TFN London in 2010 and again in 2011 and raised a total of €20,000 at the two events. While this funding was vital, one connection Jamie made at the event proved transformational for Jamie's Farm. At the event, the donor pledged a few hundred pounds to Jamie, but some time later, they made Jamie's Farm an interest-free loan of €1m so the charity could buy a farm. The following year, the same donor bought them another farm outright.

Jamie came back to a TFN London event in 2019 and said, "Pitching at TFN was transformative. Little did I know what huge opportunity there was waiting to be unlocked. TFN gave me a platform to share the vision of Jamie's Farm to an audience with the means and the heart to help instigate change. We are still experiencing the benefits of this generosity eight years on, and will do so for years to come."

The story of Jamie's Farm is not unique. The Johnson Center for Philanthropy in Michigan carried out an evaluation of TFN's work with CSOs in Central and Eastern Europe between 2012–18 to help them adopt the TFN model. The evaluation report showed that:

- Nearly half of organisations that pitched at a TFN live crowdfunding event in CEE received additional funding after the event
- Two thirds of organisations received offers of volunteer support and over half received offers of goods and services
- 54% of donors said that they gave more as a direct consequence of attending the event
- Of those who came to the event with a pre-determined budget, two thirds gave more at the event
- Host organisations (mainly community foundations) identified contributing to a culture of philanthropy in the region as the main benefit



Practical preparations

In addition to the actual training, use the pitch training session to discuss these necessary tasks prior to the event. Some of these may even be completed at the training session:

- **Sign and return a Grant Acceptance Form.** This outlines the conditions of the grant they will receive after the event (ie. from the funds collected).
- **Promote the event to their networks.** Ask them to invite friends, family, colleagues, donors, and trustees. You could provide them with a Sample Invitation to send to supporters. Encourage them to use social media to promote the event
- **Send their presentation slides to you before the event.** This should be done a few days before the event so you can review them and assemble them into one single presentation document.
- **Arrive at the venue at least 1 hour before the event.** Project presenters should arrive before the event starts in order to rehearse in the room where the event will take place and set up a display

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Pitch training and preparation

Every organisation selected to present at a TFN event should attend a pitch-training session beforehand. It is preferable to have all of the project presenters attend a meeting at the same time. We suggest presenters make a rough draft of their pitch prior to the training session, and finalise it afterwards so that they can incorporate the advice they receive into their writing.

If someone within your organising committee has professional experience of public-speaking training, ask them to help you with the session. If you don't have access to professional knowledge, use and download the Pitch Training materials from the TFN website to help develop your own training session. Ask the charities to complete a Pitch Map to help them to focus on how their project can be pitched most effectively in six minutes.

The training session should cover:

- A description of what live crowdfunding is
- An explanation of the event format and who the audience will be
- Pitching techniques: how to tell a compelling story and ask for money
- General presentation skills
- Videos of successful pitches from other TFN events

Delegating tasks for the event

There are a number of important roles at a TFN event – delegating these tasks and sharing responsibility for the event's success is a significant element of TFN's model.



Role	Task
Registration (2-3 people)	<ul style="list-style-type: none"> • Welcome guests to the event when they arrive, give them their name badge and information pack.
Host (1 person)	<ul style="list-style-type: none"> • Welcomes guests at the beginning of the formal part of the evening, introduces hosting organisations and explains event format. • After the pledging session, invites the charities back into the room and announces the total raised. • Thanks the audience, charities, event sponsors etc. • Explains the timekeeping to the audience. • Introduces each of the charities and their presenters • Chairs the question and answer session.
Timekeeper (1 person)	<ul style="list-style-type: none"> • Keeps the time for the charity presentations and questions session. Six minutes for each with a warning at five minutes. The Timekeeper needs a stopwatch and a bell.
Software operator (1 person)	<ul style="list-style-type: none"> • Responsible for checking that all the equipment is set up and working andfor operating presentation slides when necessary.
Microphone handlers for the Q&A (1-2 people)	<ul style="list-style-type: none"> • Depending on the size of the venue and the acoustics, you may need one or two people with microphones to hand to the audience during the question-and-answer sessions.
Pledging session facilitator (1 person)	<ul style="list-style-type: none"> • Explains how the pledging session works and how people record their pledges on the pledge form and make payments. • Facilitates the pledging session (see separate document). • This can be the same person as the Host or someone else.
Pledge spreadsheet tracker (1 person)	<ul style="list-style-type: none"> • Inputs the sums into the spread sheet (amounts only) as pledges are given.
Manual pledge tracker (1 person)	<ul style="list-style-type: none"> • Transcribes the pledges by hand as a cross-check (names and amounts).
Sponsors (1 person per project)	<ul style="list-style-type: none"> • Gives short endorsement of the project they nominated before the facilitator opens up the pledging session. • Gives first pledge (normally about €250, depending on location).