



“BETWEEN MISSION AND MARKET”

The creation of fundraising propositions

Author: Paula Birnbaum Guillet de Monthoux©

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Supervisor: Ola Feurst

Abstract

The voluntary sector is growing in importance; in fundraising turnover, number of players and marketing professionalism. This study explores the process by which the fundraising organisations define and develop their propositions to the market. Starting with an observation that organisations with very different history and tradition present themselves to the market in similar ways, it investigates how three leading Swedish organisations create the basis for their propositions to the market of donors, which in fundraising practice jargon is called the Case for Support.

Drawing upon research in philanthropic giving and organisational identity, the author suggests a theoretical framework for such a fundraising Case for Support. It recognises two main sources of influence, an external market source driven by donors, consumer image and behavioural trends and an internal mission driven source, defined by organisational history, values and programme track record. In the playing field between Market and Mission an organisation can reflect, develop and communicate their Case for Support – and their own ‘selves’.

Key words:

Subject Area 1: Marketing / Organisation

Subject Area 2: Non-profit Organisations

Subject Area 3: Fundraising

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1. INTRODUCTION

1.1. Background

My personal interest in the subject started many years ago, when as a Marketing graduate thinking about future professional opportunities I happily stumbled upon the non-profit sector and soon thereafter started my career as a professional international fundraiser. Today, 15 years later, I see such career choices done far more intentional as fundraising and non-profit marketing is establishing itself as a true profession. Very soon after entering the exciting new world of fundraising I started reflect upon how organisations presented themselves and their 'product' to presumptive donors. Some used heart dripping stories, bordering emotional blackmailing others gave away pins or stickers as visible signs of the donor's generosity. Sometimes the case was presented as factual investment statements describing what a donation would trigger in terms of action and impact, on other occasions the donor was invited to participate at entertaining events which, seemingly unrelated, generated a profit for the cause. Everyone used pictures of children. And everyone replicated what worked best for others. Most importantly what I saw, and have seen since, is how many fundraising asks and messages seem almost interchangeable between organisations.

At the same time, I learned how different organisations operate in their programmatic work. The different roles that came to play in the daily field operations, even for organisations working in the same domain, e g international development work.

I started to ask myself why such differences were not used in marketing. Were they not recognised? Not seen as relevant? These reflections and thoughts grew into fundamental interest in how non-profit causes are internally interpreted within their organisation in view of being presented to a wider donor public.

1.2. A growing sector

The Swedish voluntary sector is in sharp upswing, gaining in both economic importance, number of actors and professionalism.

In recent years we have seen a steady growth in fundraising income by voluntary organisations. From 1998 to 2007 turnover among the key fundraising organisations, measured by organisations holding a so called 90-account¹ rose from 5.6 to 10.9 billion SEK (SFI n.d.), the biggest share of which are donations from the general public². Continuing in 2008 Swedish fundraising grew with 500 million SEK among the ten largest organisations alone (FRII 2009), a development that can be seen in sharp contrast to the rest of the economy

¹ A self imposed quality control in the sector. Holders of 90-accounts are subject to regular control and guarantee, among other things, that at least 75% of gross income is used for the cause

² 42% in 2007, SFI statistics 1998-2007

suffering from the financial crisis in 2008 and subsequent economic downturn with a shrinking GDP as a result (SCB 2009).

Not just the turnover but also the number of market actors actively competing for voluntary public support is growing, with the number of fundraising organisations more than three folding over the last 15 years (Breman 2006). Even large mature fundraising markets show similar trends. The number of charities in the UK rose from 120,000 in 1994/95 to 171,000 in 2007 (National council for voluntary organisations 2009); The US now has an estimated over 1.5 million nonprofits (Chiagouris 2005).

1.3. Naming the sector

The object of study in this paper is ‘non-profit’ organisations, sometimes referred to non-governmental organisations (although this does not cover the whole range of non-profits, such as intergovernmental UN agencies etc). I find it somewhat unsatisfying to define a sector negatively, by what they are not.

Another commonly used definition is the ‘third sector’; the first sector being the state or public actors and the second being private companies. Just like with the ‘non-profit’ definition, the ‘third sector’ seems to have come about as a bit of an afterthought. Well, there is the public and there is the private and then – “ouups, what do we do with all those entities that are neither state nor private – let’s bunch them up and call them the third sector.”

So in an attempt to describe the sector by what it is or does - rather than by what it isn’t or doesn’t I seek other alternatives. Non-profit organisations are founded because someone identified and wanted to fill a social need (Guclu, Dees & Andersen 2002) someone wanted to change the status quo. In line with this description the terminology of non-profits as ‘human change-agents’ has been suggested (Drucker 1990), but rarely used or referred to beyond its source.

Finally, the nomination I personally prefer is that of the ‘voluntary sector’. The reasoning here is that the sector is driven and fuelled by voluntary action. Let us compare with the public sector which operates within legal frameworks, essentially by setting up rules of what actors can do and cannot. The private sector is set up in an economic framework, driven by financial incentives creating the well known market forces. The voluntary sector is run by people wanting to change the world and do so by voluntarily contributing their money, time, or influence. Yes, there is also paid staff in this sector but they can be seen merely as operational necessities. The drivers, without which the sector would not exist, are entirely voluntary. Given that my focus is on the fundraising aspect of the organisations and how a mission is interpreted and translated to generate public support, this resonates most directly with the voluntary aspect of the sector. Therefore the term ‘voluntary sector’ is used most frequently in the text, but when the term non-profit occurs this should be read synonymously.

1.4. The origins of the sector

This rapid development described in part one calls for – and possibly is partly a result of - a professionalization of the fundraising and communications functions within the voluntary sector. Over recent years, terminology, practice and techniques from commercial marketing is becoming the norm also in the voluntary sector. Concepts such as branding, relationship marketing and consumer insights through market research is used extensively in search for more effective positioning, fundraising and competitive advantage in an ever more crowded market place. But looking back in history, humanitarian organisations were all once are born and built - not by smart marketers, but by social entrepreneurs, seeking to advance society through their action. These entrepreneurs, conditioned by specific historic events and humanitarian needs, formed organisations later cultivated through decades of commitment by volunteers and other front runners, all passionate about their cause and mission.

Formed by such individuals and the unique contexts and events in which they took action and formed the organisation, the identities of such organisations are bound to be very different. Each of them are founded by distinct principles, governed by certain beliefs and driven by people who are passionate about the specific solutions the organisation offers.

Someone who identifies a market need and fills it by offering a service or product is called an entrepreneur. The non-profit version of this is a social entrepreneur. *”Social Entrepreneur must have the same commitment and determination as a traditional business entrepreneur, plus a passion for the social cause, minus the expectation of significant financial gains”*. (Guclu, Dees & Anderson 2002, p. 13)

While research in social entrepreneurship is a relatively recent phenomena, strongly established only in the last ten years or so (Steyaert & Hjort 2006), social entrepreneurship as a practice certainly has been around for long.

For what, if not a social entrepreneur, - or ‘man of action’ as he is called by the early entrepreneur researcher Schumpeter (1911, cited by Swedberg 2006) - was Henry Dunand, the banker who witnessed the human terror in the battlefields of Solferino 1859 and, shaken by this experienced returned to his home Geneva to found the red cross movement to inject respect for human dignity in war. What, if not a social entrepreneur, was the UNICEF founder, the Polish lawyer Ludwik Rajchman who raised his voice on behalf of the children suffering in post war Europe 1946 proposing to the United Nations the formation of a United Nations Children’s Emergency Fund?

Each and every non-profit organisation has been created by someone (or some ones) with a strong urge to make things better – and an entrepreneurial talent to make it happen.

Many people carry a social entrepreneurial spirit. As a professional fundraiser in the development area I have many times had people express their dreams and ambitions to make the world a better place. Sometimes that urge is even stronger than an exact idea of what needs be done. Recently in a Dutch taxi, on my way from the annual fundraising event in

Noordweijkerhout the driver trashed all fundraising organisations as being unworthy of his trust and money. It was clear he was by no means the typical charity donor. But was he against the attempt to make the world a better place? Of course not. In the next sentence he revealed. “I want to found my own organisation. I just need to decide on the cause”. This story is just meant to illustrate how widespread the wish is to change the world, how widespread the seed to social entrepreneurship.

The initial act of Social entrepreneurship often includes a dimension of fundraising. The entrepreneur, eager to launch his idea, is the best possible advocate for his her own idea and often successfully gets others onboard to help finance it.

But what happens when the passionate presence of the founder is gone? When somebody else is employed to professionally and continuously raise the funding needed to run the entrepreneurial idea longer term? Figures above show us this is a successful and growing enterprise in terms of financial turn-over in the sector. But what happens to the ideas that ones launched the organisation, how are they turned into fundraising messages and proposition to a broad donor audience?

1.5. A paradox

The task of creating fundraising communication for a charitable organisation should be a dream for any marketer. In times when everybody seems convinced that experiences, authenticity and story-telling are building blocks for creating strong brands and distinct propositions, humanitarian organisations seem to possess just the tool box everyone needs. Social entrepreneurial founders as heroes, real people in often dramatic field conditions, fight for values and beliefs for life and death - every day. Authentic organisational histories full of passion and personality. Daily operations that would make most reality show producers green of envy.

However, I dare suggest that the image projected among the general public and potential supporters is quite similar between organisations in the same field. Perception towards voluntary sector is generally positive but seems to lack distinct knowledge and opinions. Is the sector as a whole just considered a bunch of generic ‘do gooders’?

The former Director of fundraising in UNICEF, Per Stenbeck, used to express what he perceived a lack of perceived uniqueness with some frustration: “People cannot tell SOS Children villages apart from UNICEF – they just think we both help kids. But that is really all we have in common. UNICEF is rights-based with the ambition to reach all children whose rights are not met while SOS with a charitable approach claim that no-one can help all but everyone can help someone.”

Another illustration comes from people sharing their views on the voluntary sector. The following comments are all taken from a recent national survey in Sweden on attitudes about voluntary organisations (TNS Gallup 2009)

- “I don’t know a lot about them, but it’s good they exist”

- “I know too little about the subject. I donate every now and then but haven’t really given much thought”
- “It’s good they try to help people, but I really don’t have a clue”

My own long practical experience in the sector testifies such quotes and comments represent a daily reality for fundraisers. The struggle for deeper engagement and recognition of the distinguishing factors between various humanitarian and development organisations is something that occupies fundraising communicators extensively. The search of distinctiveness or ‘USP’ (Unique Selling Proposition) is a frequent topic of discussion at meetings and workshops in the sector, but compared to most other themes one rarely illustrated with successful cases, helpful insights or guidance.

That is the paradox: The desire to communicate uniqueness seems to be there; the raw material is available in stories and realities to create the propositions; but the results in terms of projected images appear bland.

2. RESEARCH PURPOSE

The overall aim of my study is to better understand how fundraisers present their organisation and cause to the market in order to obtain financial support. What sources and processes are in place when fundraisers define the substance of the messages communicated to donors?

My hope and intention is for the study to provide a theoretical framework and structure for understanding and creating fundraising propositions. Maybe this could contribute in a small way to the still modest but growing theoretical body of knowledge in the practice dominated field of fundraising.

Lastly, by shedding some light on the fundraising interpretation of voluntary organisations, we may start to understand how such organisations can potentially develop from passionate and radical social entrepreneurial ventures to watered-down generic ‘do gooders’.

3. THE PROBLEM AND THEORETICAL FRAMEWORK

3.1. Two bodies of literature

I observed that voluntary organisations in the humanitarian sector make propositions to donors that are surprisingly similar although the organisations differ. From my overall query of ‘why is that so?’ I now zoom in on my special object of study; to understand how the fundraisers who prepare and present their organisations to potential donors formulate such propositions.

Before embarking on the empirical research and methodological issues connected to the collection of data we may ask what theoretical framework might be of use to articulate the findings of my project. Has there been any academic management research of similar problems that might help putting my investigation of fundraising practices in a somewhat broader scientific context.

My initial question when embarking on search for relevant academic literature was of course; what has been written explicitly about fundraising for humanitarian causes.

For long, fundraising as a special field was barely approached by academics. There is to date still only one full professor in fundraising in the world.³ But this seems to be changing and recently fundraising has gathered more interest of academic researchers. Most of it looks into measuring fundraising both on a micro level in terms of e.g. efficiency or performance and on a macro level in terms of e.g. economic significance in society. As my objective is not to measure but to gain a broader understanding of how fundraisers go about packaging an offer to the market, this bulk of literature was not judged to be applicable. But a number of authors have explored the more relevant areas of donors’ philanthropic giving and the link between propositions made by voluntary organisations and such giving behaviour. This first body of knowledge which I choose to focus can be called ‘Philanthropic giving’.

Apart from literature of how and why one makes philanthropic gifts, I discovered a second body of literature in tune with my original query. I started out wondering why different organisations make so similar offers. But what then makes an organisation different? What makes it special? Under the general heading of ‘organisational identity’ I found my second body of knowledge to help articulate my first intuitive feeling. What does it mean for an organisation to have a specific identity and how might it be developed and shaped?

3.2. Philanthropic giving

What does research in philanthropic giving tell us about the markets fundraiser face? Can this body of research help us articulate if there is a real difference marketing to buyers and making a proposition to potential donors? To understand how an organisation presents itself to donors, one must take into account the donor and the act of giving, which is why I have

³ Adrian Sargeant at Indiana University.

chosen to look into studies that address areas of motivation and influences of philanthropic behaviour. This addresses the very foundational question in fundraising - why people give.

Why do people give away money?

The reasons suggested to explain why people donate money are usually listed and clustered in two groups: self-interest vs. altruism (Sargeant & Jay 2004). The philosophical idea of pure altruism is put against classic economic thinking suggesting people act for their own benefit. Such benefit could be in the form of recognition, social status or benefits through the organisations actual actions. The latter could be direct or indirect. For example supporting cancer research now may help the donor later in life, if she develops cancer. A donation to an organisation providing social services to the elderly may indeed help a family member in need. Recent psycho-economic research suggests that the two notions do not contradict one another but exist in parallel and are often mixed. Some giving is truly altruistic in the sense that they do not result in any material or symbolic returns to the donor. Take for example an anonymous gift to a far away country. From an economic perspective this is explained by the positive feeling it gives to the donor – the ‘warm glow’. This is sometimes referred to as imperfect altruism suggesting people (donors) can be altruistic and egoistic at the same time. (Breman 2006)

With such a general understanding of why people give, let’s look a bit closer at the impact of the work of a fundraiser. How is a donor motivated and influenced by how the actual fundraising ask is made, what types of information and options is put forward? Breman (2006) conducted a study to investigate the impact of various features of a fundraising ask on actual donor behaviour. It includes a variety of parameters including 1) effectiveness, 2) ability to earmark, 3) amount of information offered to allow identification with the beneficiary (e.g. country, photo, age, interest of beneficiary). The findings reveal that the strongest impact on behaviour, i.e. propensity to give, comes from the perceived effectiveness. This is followed by the donor’s ability to assign the destination of the money. The latter is referred to as ‘paternalistic altruism’ as it reflects a paternalistic attitude of the donor, suggesting (s)he knows best where the money ought to be spent. Both findings can be translated into concrete directions for fundraising practitioners designing their fundraising communication: 1) Focus on transparency and reliability of funds reaching the intended destination and 2) Provide opportunities to the donor to make choices and influence the use of funds.

Somewhat surprisingly, the impact of identification with the recipient, tested through varying amount of information about the person in need, showed no impact at all on the likelihood to donate. The identification seems like an obvious driver to donate. Seeing suffering can put us in the shoes of the other and trigger empathy and donation as a response. A suggestion to understand why this may not be a significant differentiator when organisations ask for money is offered by psychological research. A US study which has looked into donation attitudes, to compare the willingness to donate towards individuals in need with willingness to donate

towards intermediary organisations (e.g. a homeless person vs. an organisation helping the homeless). It concludes that the identification aspect – here expressed as the perceived similarity and responsibility – is significantly reduced with the presence of an intermediary organisation. (Kayser, Farwell & Greitemeyer 2008)

Donor personality

The above explains a little of how the cause and the beneficiary, and the way in which these are presented by fundraisers, can influence giving. But what about the donor, what aspects of the donor personality drives giving behaviour? What do we know about who gives, to what and how this can be influenced? The role of a person's personality (or identity) and its impact on donation behaviour has been investigated by Arnett, German and Hunt in their article 'The Identity Salience Model' (2003). They look into how a person's personality traits influence actual giving behaviour and what role an organisation can have to influence this. The authors suggest an individual holds multiple identities (or aspects of their personalities) for example 'being Irish', 'fan of local football team' and 'alumni of a certain university', etc. Such identities are ranked hierarchically, i.e. some of them are more important to the individual than others. The higher the identity is ranked - the stronger the impact on the individual's behaviour, including donation behaviour and promotional activity (like spreading positive word of mouth). This may seem straight forward: If I consider 'being an alumni of University x' to be an important aspect of who I am, this makes me more likely to make a donation to that same university. But the conclusions go further than this. The authors state that people seek to enhance their salient identities, to reinforce their identity and to avoid situations that contradict it, as this creates stress for the individual. Voluntary organisations have an opportunity to play an active role here, to offer people possibilities to create and reinforce identities in line with the identity of the organisation in question. One powerful way of doing this, according to the study, is to allow active involvement. Involvement creates identification and strengthens the salient identity of the individual. In the voluntary sector, volunteering and other types of non-financial engagement could provide unique opportunities for involvement. And this in turn would according to the study create higher donations and positive promotion for the organisation. This suggests voluntary organisations do not simply have the task of mirroring or even just appeal to individual personalities but a powerful opportunity to actually form them.

Fundraising – from 'suffering other' to 'heroic donor'?

The ideas of appealing to or even contribute to creating the donor's personality is in line with recent trends in fundraising messaging and concepts. Several studies note the shift in communication from humanitarian organisation over the last recent decade or so. The traditional focus was on the object – the 'suffering other' (Vestergaard 2008, p 20). The attempt to create compassion with the victim would results in an urge to give. Beneficiaries were typically portrayed as objects: needy, passive receivers. This approach flourished and peaked in the 1980s with events such as the massive Band Aid and Live Aid fundraising,

featuring live televised strong images of starving children accompanied by emotional music pulling all heart strings of compassion – pity and guilt. Such types of communication has been heavily criticised by many and sometimes referred to as ‘pornography of poverty’ (Cameron & Haanstra 2008, p 1476). Also, it seems to have worn out donor responsiveness, thereby losing in effectiveness. Such ‘donor fatigue’ as it is known in the world of fundraising, may be a result of a general ‘compassion fatigue’ describing how the emotional impact of images of poverty is reduced with repetition (Cameron & Haanstra 2008, p 1479).



Fig. 1 Live aid Lead image of Ethiopian child ‘minutes away from dying’ in ‘The Famine video’, 1985.
Illustration of fundraising images sometimes referred to as pornography of poverty.⁴

More recently, the tendency in fundraising communication is moving the spotlight to the subject – the supporter, the active donor making a positive impact. This is powerfully illustrated through campaigns such as the ‘Product Red’, which offers the supporter attractive products from well known brands which through a percentage of the sales support development work against AIDS in Africa. All attention is on the donor who joins a group of other attractive supporters – inspired and led by celebrity faces such as Bono. Other recent examples of such donor focused approaches is the increase in so called ‘challenge events’, in which the donor does something hard, exhausting or terrifying (run, bungee jumping, loses weight loss and so on) and get’s sponsored by others do so. New forms of individual fundraising initiatives are also facilitated by the web and social media with ‘my fundraising’ pages popping up all over. What they have in common is that the donor is in the centre. The donor is the agent and the hero, getting friends to join. The cause and the beneficiaries are marginalised.

⁴ Unrelated but comforting note: The girl actually survived and participated at the live8 event 20 years later



Fig. 2 American Express Advert in the Product Red campaign,
 Illustration of the recent tendency of donor focus in fundraising communication

While the former communication focus on the beneficiaries was heavily criticised for its pitiful objectification of the ‘other’, the newer tendency is questioned for its simplification of the cause and for potentially reinforcing a paternalistic relationship between the North and the South by overemphasising and glorifying the (Northern) donor, the ‘self’. It could even threaten to undermine development goals such as social justice and empowerment. (Cameron & Haanstra 2008) thereby interfering with some voluntary organisations’ actual mission.

The theories and thinking above provide some understanding of the donor and the drivers behind giving. Who, why and to what people give - and how this is influenced by fundraising activities. Now, let’s turn to another body of research to get insights in how we can understand the organisations - and the organisation can understand itself.

3.3. Organisational identity

An initial observation and starting point was that voluntary organisations, even those within the same category, such as ‘children’, ‘environment’ or ‘animals’, can be very different. They have different personalities, characters or, as this second body of literature puts it, identities. It is my own conviction based on my years as an insider in a large voluntary organisation. So can this body of literature be used to understand more in detail what identity might be and how one might develop and communicate it in the fundraising practice I subsequently set out to explore in more empirical detail?

What is organisational identity?

The most frequently referred to definition of organisational identity is that of Albert & Whetten (1985) which describes identity as something that is central, distinct and enduring in

an organisation. The ‘central’ aspect underlines that it needs to be important to the organisation in order to be part of the identity. There might be many aspects of an organisation that simply exists without them playing a key role in who the organisation is. In the context of non-profit for example the national origin of the founder may be a key important element of the identity or it may simply be a random fact. The fact that Henry Dunand was Swiss has definitely played a strong role in the identity of the Red Cross, (possibly so strong that the national aspect of the organisational identity has even influenced the Swiss National identity, but I restrain from exploring this interesting but unrelated side track) In parallel, the UNICEF founder was from Poland. This is a well known fact in the organisation but not once mentioned orally or in writing as something that would influence the identity, Polish heritage is, arguably, simply not part of how UNICEF is seen or sees itself.

The criterion of something being ‘distinct’ underlines the whole quest for uniqueness in the formation of an identity. An identity, organisational or personal, needs to be different from another identity. The word identity comes from the Latin *Identitas* which means *Same* (Oxford dictionary online n.d.). The identity is thus a way to identify what is the same, and what is the same is by definition different from something else. The central and the distinct can sometimes be confused and really defining what is distinct in an organisation is not easy. We may be very proud about a central element of our identity, say for example we are a big organisation. Well, if that is true for most of the organisations around us, then maybe that characteristic needs to be better defined. Is the organisation for instance present in more countries than most, employing more staff, or reaching more beneficiaries?

While to some degree challenged, the notion of ‘enduring’ still to me remains valid as a starting point. The enduring forces us to dig deeper than the flavour-of-the-day expression of a specific value or feature. Let me explain. At certain times, there are buzz words that everyone wants to jump at and identify with. Let’s pick one – innovation. Many organisations argue that innovation is part of their identity, and in many cases for sure it is true. Using Albert and Whetten’s criterion of enduring helps test the validity of it. Are there track records for claiming innovation as part of identity, are there milestones to argue for its central role?

The enduring aspect is probably the one mostly debated. In their article ‘Identity, Image and Adaptive Instability’ Gioia, Schulze & Corley (2000) suggest identity has a ‘fluid nature’ and make a distinction between ‘enduring identity’ – which remains the same over time – and ‘identity with continuity’ - with core values and beliefs extending over time but with shifts in interpretation in order to remain relevant in a changing environment. (Gioia, Schulze & Corley 2000, p 65)

Organisational identity as a field of academic research has developed strongly over the last two decades or so. The field of identity studies is open and heterogeneous as it has developed in parallel within different academic discipline, e g organisational behaviour (for example Albert & Whetten), sociology (for example Mead) and not least within marketing (for

example Bernstein). If for Albert and Whetten the emphasis of identity is on the internal and cultural aspects (how we see ourselves), the focus within marketing has often been the external perception or expression, e.g. corporate image, branding and the visual identity.

In his article: 'Corporate identity corporate branding and corporate marketing. Seeing through the fog' John M T Balmer (2001) makes an ambitious effort to clarify and put in relation the various strands of thought within identity studies. He differentiates between three main directions: Corporate Identity, Organisational Identity and Visual Identity, suggesting 'Business Identity' as an umbrella title for them all and offers the following comprehensive definition (Balmer 2001, p 280):

"An organisation's identity is a summation of those tangible and intangible elements that make any corporate entity distinct. It is shaped by the actions of corporate founders and leaders, by tradition and by the environment. At its core is the mix of employees' values which are expressed in terms of their affinities to corporate, professional, national and other identities. It is multidisciplinary in scope and is a melding of strategy structure communication and culture. It is manifested through multifarious communications channels encapsulating products and organisational performance, employee communication and behaviour, controlled communication and stakeholder and network discourse."

In addition Balmer explores the key elements of the 'identity mix' (what constitutes the identity). Building on the work of several others he offers a useful model for this concept (Figure 3):

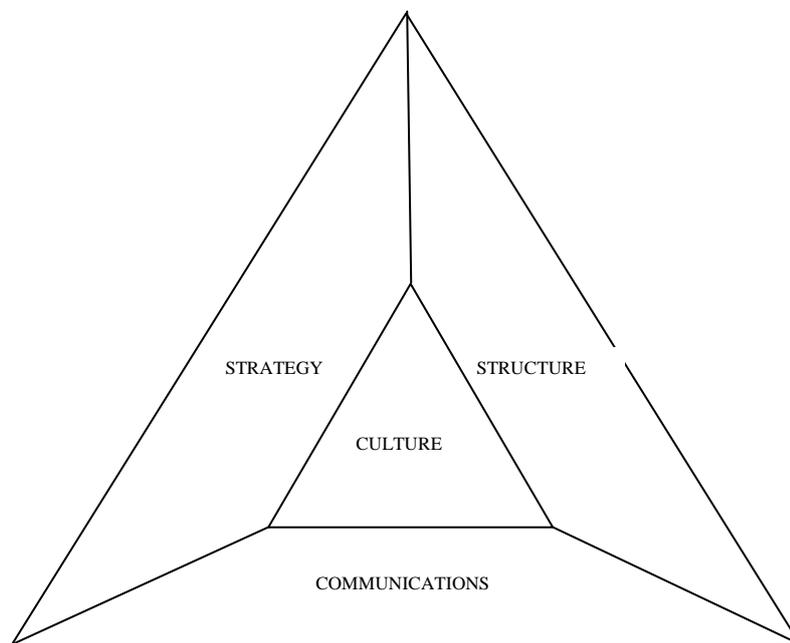


Fig. 3 'Balmer's new identity mix', Balmer 2001, p 263
Suggesting four core components of what constitutes an organisation's identity

Creation of identity

So with some understanding of what organisational identity is, let's now look into how this identity might be created. What sources and processes are involved in forming and shaping an organisation's identity?

Perhaps not surprisingly some of the early work addressing organisational identity relate strongly to the social and psychological tradition of individual identity, using reasoning and findings to benefit the understanding of organisations and their identities. The sociologist Mead is part of this tradition when back in 1934 in 'The Self' he introduces the idea that the Self consists of both an 'I' and a 'Me'. The 'I' is the substance of the self, our action and experiences. The 'I' is the part of self that defines 'who I think I am'. The 'Me' is the reflexive self, originating from the meeting with others. This external influence, or rather our own assumption of the expectations and attitude of others vis-a-vis the 'I', instantly creates the 'Me'. The 'Me' represents the self of 'how I think others see me'. The 'I' comes before the 'Me', but the 'I' becomes 'Me' as soon as we act or talk since this involves an external environment and our expectations thereof on our self. Mead suggests that the self is conducted by a process between 'I' and 'Me'.

Applying the notion of 'I' and 'Me' on organisations, and the voluntary sector specifically, offers an interesting perspective. To start with one must define the internal and the external here. Using a simple classification of staff being internal and the rest of the world the external context providing reflexive is probably too simplistic in organisations that are often membership based and sometimes benefit from a large and passionate volunteer force, both of which would certainly consider themselves insiders and part of the organisation in question. But applying a somewhat more generous 'I', including key stakeholders performing internal tasks and responsibilities, paid or unpaid the model offers an interesting dynamic way of viewing identity building. It would suggest that the identity of a voluntary organisation is created in the process involving on one hand the views and beliefs of a broadly defined 'workforce' carrying out day to day activities in the name of the organisation and having the historic experience of earlier actions – the 'I'. On the other hand this 'I' meets a broad and diverse constituencies, beneficiaries, donors, partner organisations, suppliers etc, all with different views and expectations of who the organisation is. What is at play here is not the 'objective' actual external expectations but the assumptions thereof, i.e. what do the insiders in the organisation think the external constituencies expects, who do they think others want them to be?

This could certainly be applied in the everyday context of voluntary organisations. There are constant decisions made based on who the organisation thinks others want them to be, what they want them to do. What would a potential donor expect of us in this situation? What do we think our beneficiaries would want us to do? Such considerations and decisions may be spontaneous or even unconscious acts in a day to day context. Or it may be applying planned

and systematic strategies, including e.g. market research, needs assessments and other techniques in the attempt to properly capture and interpret the expectations of others.

This duality in the identity between an internally and externally defined self as described by Mead resonates with later work around organisational identity and image. Gioia, Schulz and Corley (2000) introduce the concept of adaptive flexibility by which they suggest that identity is created, and constantly dynamically recreated through its interrelationship with image.

A postmodern interpretation would be giving yet more importance to the influence of image on identity, leaning towards complete instability and an entirely external creation of identity. In its extreme form the postmodern claim would be that identity is an illusion. Described e.g. by Mats Alvesson (1990) in his article 'Organisation: From substance to Image' the postmodern argument is that identity is not built on any 'actual' substance in the self. Instead the argument is that identity is a social construction, all made up by image. Identity does not exist.

Hatch and Schulze (2002) in 'The Dynamics of Organisational Identity' offer a more balanced view, including both substantive and image influence on identity. Reinterpreting and applying the 'I' and the 'Me' from Mead, Hatch and Schulze suggest that Organisational identity is a dynamic, not static, concept. Two main sources interact in the creation of identity: Culture and Image. See fig. 4.

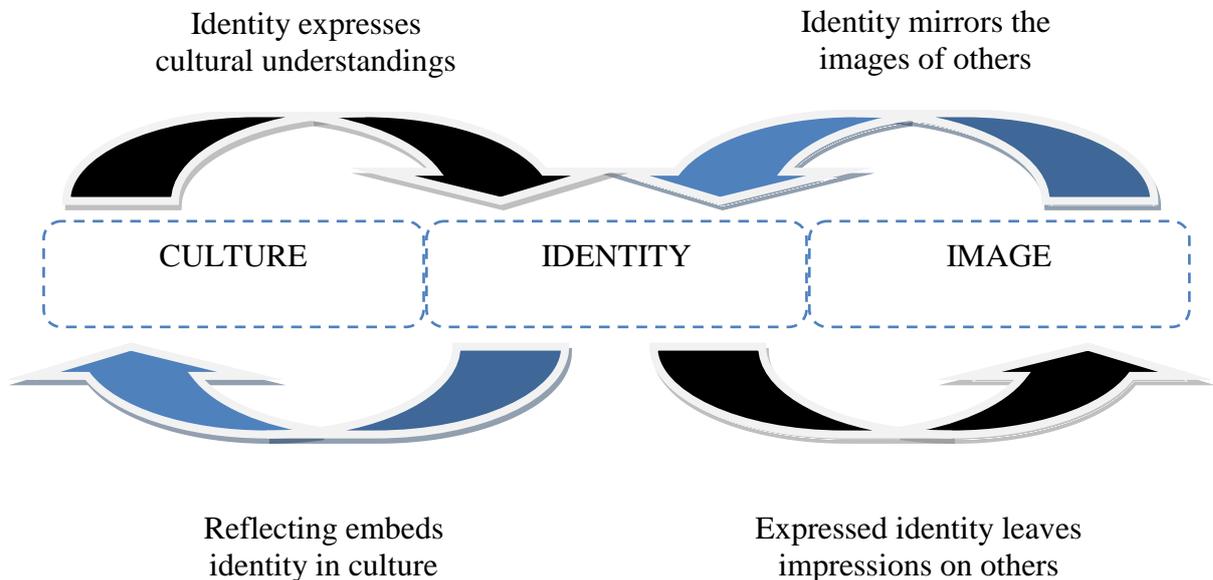


Fig. 4 Hatch and Schulze's 'Organisational Identity Dynamics Model'. Hatch and Schulz, 2002, p 991.

The model suggests the two main forces and the continuous dynamics and by which an organisation's identity is formed.

- **Culture** is made up by 'tacit organisational understandings, (e.g. assumptions, beliefs and values) that contextualize efforts to make meaning, including internal self-

definition'. Just like the 'I' in Meads model, culture defines the unconscious identity that is responsive to the attitude of others. The moment the 'I' is expressed and becomes explicit it turns into the Image, the organisational 'Me'

- **Image** is defined as the 'set of views on the organisation held by those who act as the organisation's 'others'. The image corresponds directly with Meads 'Me' as the mirroring that constructs identity.

The dynamics of the two forces need to be carefully weighted, see Fig. 5. Giving too much influence to one makes the identity tip over in an unfortunate and dysfunctional one-sidedness. Being too pre-occupied with Culture, and ignoring the Image influences, puts the organisation at risk of heading towards a Narcissistic identity. The result of such an unbalance would be that the organisation loses support and interest from external stakeholders. Translated into a voluntary organisation, this would mean the cause as expressed by the organisation simply becomes irrelevant to donors and supporters. And without external support and engagement there is no future for an organisation.

In reverse, an organisation that plays too much tribute to the Image influence on its identity, ignoring or playing down aspects like history and cultural heritage, can turn into 'Hyper Adaptation'. This would be an organisation without a solid centre, a strong internally defined substance. Applying this scenario on voluntary sector, this would lead to entirely market driven cases for support. The organisation would do and be what the donors want. This would threaten organisational integrity and in an extreme form could lead to shallow and gimmicky fundraising without strong links to the cause.

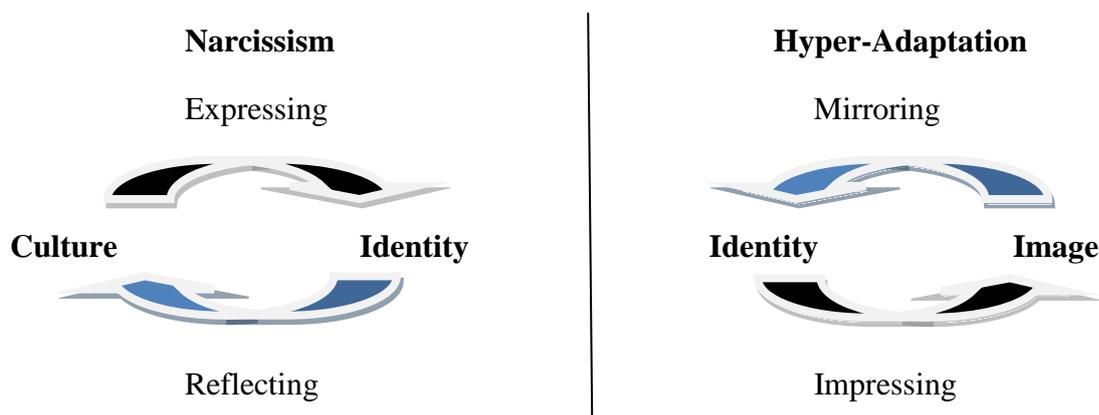


Fig. 5 Sub dynamics of the Organisational Identity Dynamics Model and their potential dysfunctions, Hatch and Schultz 2002, p 1006

The model shows the risks of allowing too strong influence from either Culture or Image on the Identity

Organisational identity, branding and fundraising communications

Organisational identity and how an organisation defines itself – through culture, strategy, structure and communication - plays a crucial role in how it presents itself and is seen by the external world. Balmer expands his model described above (Fig. 3) with an outer triangle that constitutes the three key areas for identity management, namely Environment, Stakeholders, and Reputations. Environment stresses the impact of and need for identity management to reflect and possibly adjust to external market conditions, stakeholders need to be considered and lastly reputation makes the point that reputation also is influenced by related entities, be it subsidiaries, partnerships etc. In the area of voluntary organisations these are all easily applicable concepts with each such area directly applicable to the creation of fundraising propositions as part or example of identity management. - The challenge and influence from the environment is constant, for example different levels of market maturity or changing technology producing different realities - Donors and potential future donors are examples of key stakeholders to be considered, and finally - The reputation impact, including for example the potential effect of (and careful consideration given to) a new corporate partnership.

Many others also point to the importance of organisational identity for successful marketing measures including the competitive positioning, branding and image:

“...behaviour that supports a corporate brand and builds a strong reputation for the company needs deep roots, it needs to rest in the organisation’s identity”...

(Hatch & Schultz 2004, p 2)

“Every organisation has an identity. It articulates the corporate ethos, aims and values and presents a sense of individuality that can help to differentiate the organisation within its competitive environment.”

(Balmer 2001, p 291)

With the relatively recent wake up to branding in the voluntary sector (for example Sargeant, Hudson & West 2008; Stride 2006), the study and understanding of organisational identity is important from a brand management perspective.

While the buzz word – and practice - of branding has clearly reached the voluntary sector (Chiagouris 2005) there is relatively little research on about what brand management means for the voluntary sector. The relationship between commercial brand management and non-profit seems to not be quite straight forward. The needs of donors and influences on donor behaviour are not necessarily directly transferable from consumer behaviour in commercial branding theory. Sargeant points towards some key differences. Factors, which are critical for differentiation in the commercial branding, e.g the notion of ‘change’ or ‘progression’ and ‘caring’ or ‘benevolence’, his study concludes, are inherent and shared within the voluntary sector. Thus any brand management strategy or activities underlining these values are somewhat in vain, not addressing the points that make a difference. In contrast, the aspects creating real differentiation are ‘emotional engagement’, ‘voice’, ‘service’ and ‘tradition’.

Sargeant states that current practice in the UK voluntary sector does not reflect this. This result offers an interesting reflection and possible application of Barner's Identity model. The 'Voice' and 'Emotional Engagement' could be closely related to Barner's notion of 'Communication'⁵. 'Tradition' opens the link to 'Culture' which stands for the subjective internal elements and values. 'Strategy' as the sum of conscious decisions by the organisation, including such things as product performance would suggest parallels to 'Service', i.e. what the organisation practically delivers programmatically.

Helen Stride (2006) takes a more conceptually critical view when investigating branding in the voluntary sector. Her description of branding as a 'Mirror, Lamp or Lens' offers a helpful metaphor in applying branding to voluntary organisations.

- The Mirror: 'Values with which the consumers identify or to which they aspire are mirrored back to them via the brand'. This puts focus on the market and the external environments view of the organisation. The brand becomes a reflection of the external wishes aspects that match the organisation
- The Lamp: 'A brand's own unique values are shone like a light externally and internally in an attempt to influence the values of its target audience and those of the host organisation.' This way, the brand actually attempts to 'create the wants it is there to satisfy' and to align values of the organisation (staff) with those of the brand.
- The Lens: 'The brand projects the values upon which the organisation is based'

Stride argues that voluntary organisations (or the charity sector as she refers to them) should apply the lens approach in their branding efforts. The values-led aspect of the sector makes the lens the only appropriate way allowing the organisations to project their 'non-negotiable' values, seek supporters whose values reflect its own or powerfully inspire people to share these values.

The research on organisational identity provides a useful approach to address and understand the essence – or self - of an organisation. It proves immediately relevant to external communication, overall branding and related image of an organisation. The concept of organisational identity is judged equally applicable and important to the voluntary sector. It provides a valuable perspective on fundraising propositions as packaged 'selves' presented to potential donors.

⁵ In earlier work Barner referred to Voice, Soul and Mind for Communication, Culture and Strategy respectively. Later adding "Structure" he chose to break with the human metaphor, although the structure could have been encompassed as "body".

4. RESEARCH QUESTIONS

4.1. The case for support

As a way to frame the research problem and approach the empirical part of my study I propose a basic concept from fundraising practice, called the ‘Case for Support’. The case for support represents the reason for a donor to support an organisation. It forms the basis for every fundraising activity carried out by the organisation, a kind of ‘über’ proposition which can be applied through various expressions tailored to context and audience. In fundraising literature the case for support is most succinctly described as ‘the expression of the cause and why it warrants support’ (Sergeant 2004, p 86). Sergeant suggests three elements for creating and managing the Case for Support:

1. Compiling Case Resources
2. Understanding Donors
3. Writing Case Expressions

Reviewing these through the lens of the two bodies of literature above; step one is about understanding the organisation, the cause, by using all the sources at hand to answer the questions: ‘who we are’ and ‘what we do’. This resonates with and allows us to tap into the wealth of thinking in organisational identity. Step two takes into account our understanding of donors and what influences their behaviour. This allows us to use and apply the research around philanthropy and why people give. Step three is the actual expression of the case, the digested combination of the first two steps. The success of the expression depends on the quality of step one and two, the careful balancing between them and subsequent creative communication. As such, the case for support it is the ultimate platform based on which an organisation builds its various fundraising communications. Every fundraising proposition is an expression of the case for support.

4.2. Research questions

The Research Purpose expresses my motivation; the streams of thinking around the Donor and the Organisation’s Identity provide the theoretical guidance; and finally the concept of the Case for Support introduced above offers a practical frame.

Within these parameters the following key research questions are formulated, to be explored empirically:

- ❖ How is a fundraising Case for Support being created in leading voluntary organisations? Is it made explicit (a formal process, a written document etc)? What does the process look like and which are the key sources and players involved? Specifically:

- How are internal factors – e.g. the origins of the organisation, the milestones that are seen to have shaped the organisation – captured and featured in the Case for Support?
- How are external factors – i.e. the influences from the market place, from donors and other key constituencies – taken into account and featured in the case for support?

Answering the questions above should provide elements to better understand the development of – including the sources and processes involved - an organisation's Case for Support as the overall frame for their fundraising propositions.

The focus of the study is all around internal processes and perceptions, not the later application of the end product.

The subsequent external stage, namely the actual expression of the case to the donor, involving the process of marketing (including selection of channel, media, target audience etc and the management of the relationship with the donor) are very interesting and related areas for research but not addressed in this study. Questions that could be explored there are for instance the analysis of actual fundraising messages and also the donors interpretation and view of the same.

5. METHOD & SCOPE OF STUDY

5.1. Qualitative methodology

This purpose and research questions form an exploratory approach to the subject, with the aim of gaining new insights in fundraising development processes within organisations. It is not about measuring well known facts but rather about identifying the features and components which may possibly later be measured. Such a first exploratory phase calls for a qualitative and flexible methodology (Robson 2002).

The main source of empirical data is gathered through personal face-to-face interviews.

In addition to the interviews I have gathered participatory observations at two key events:

1. IFC, the international fundraising congress, held in Holland every October gathering around 1000 fundraisers from around the world. It is an arguably the biggest international fundraising conference in the world. Larger gatherings such as the American Fundraising Professionals conference or the UK National Convention have a purely national or regional focus.
2. Insamlingsforum, the annual Swedish National fundraising conference, held in May outside Stockholm with around 200 participants.

The personal interviews were guided by a semi-structured questionnaire (Appendix 3, Interview guideline) and carried out more in the form of informal conversations among colleagues in the same sector than formal roles of interviewer and interviewee. In order for me to be able to fully engage in the discussions, and lead them in a flexible and responsive way, all interviews were recorded. The first interview used as a pilot was videotaped. But after one of the interviewee asked to not be in picture, video was judged too intrusive to achieve the informal setting, the camera was turned away and the rest of the interviews were only audio recorded. The audio recordings also enabled full reiteration and analysis of the conversations.

As I am myself involved in the sector, currently employed by one of the major actors (UNICEF), and a speaker at the two events mentioned (IFC and Insamlingsforum), I need to be conscious about and reflect upon my own role in the study. My role and experience provides great benefits in that it gives me understanding and insights in the sector, knowledge of specific technical language and expressions and hopefully an ability to interpret and put into context some of the data. But it holds a handicap. I cannot be the invisible 'fly on the wall'. My presence and information gathering cannot go unnoticed as some act of neutral measurement. Also, the sense of competition in the sector is strong and whilst the research question as such looks at the sector as a whole and focuses on internal processes not external marketing, thus not aiming to reveal some organisation specific competitive advantage that can be copied or abused, the sensitivity of me working for the competitor cannot be ignored.

Thus, rather than attempting to claim neutrality as observer I choose to accept and act as a participant, engaging in interactive conversations rather than plain questions about the substance and using my pre-knowledge to guide talks. The informal setting in the interviews helped disarm some of the sensitivities around competition.

The chosen flexible form for data collection does require an organised and disciplined approach. In this regard I have approached the task guided by a 'scientific attitude' (Robson 2002, p 18) calling for research to be conducted Systematically, Sceptically and Ethically.

5.2. Focus and limitations

Organisations

The organisations selected for this study are all large international children charities with significant presence in Sweden. They represent three of the four child focused organisations of the top ten fundraising organisations in Sweden 2008.

The reason for this selection is twofold.

- 1) I wanted to compare organisations working for similar causes and causes with broad general appeal. This choice is to be able to observe hopefully generic practices rather than specific behaviour linked to a niche cause or much specialised organisation. Children benefit from the highest public level of support; expressed as willingness to donate (Gallup 2009) thus the broad cause of working for children was chosen.
- 2) Also, I wanted to look at organisations big enough to have significant resources, people and budgets, to spend on communications. The latter to ensure the marketing communication deriving from the organisation had a fair chance to be strategically planned and intentional, rather than a random result of scattered volunteer activities. The selected organisations are the three of the four child focused organisations from the list of top ten fundraising organisations in Sweden. The fourth was initially included but unfortunately an interview turned out to not be possible within the time frame of the study. The organisations all raised over 200 million SEK in the past fiscal year and they all have professional full time teams working on communication and fundraising.

The key person of interest to answer the research question is the decision maker within the fundraising department, typically the Fundraising or Marketing Director depending on titles and structures within the organisations. It is the person whose function it is to act as an interpreter between the organisation and the donor, managing the process of identifying and understanding 'what the organisation is and does' and thereby creating what is referred to above as the Case for Support.

Interviews were held with the key fundraising decision maker in each of the selected organisations. In one case where the post of fundraising director was vacant the interview was instead held with the two senior project managers.

The second restriction relates to the actual area of fundraising communication, the type of fundraising propositions studied. Here, I have chosen to look at monthly giving schemes or committed giving products, as they are sometimes called, and the case for support for these programmes. The reason for this choice is that this type of giving represents an important income channel, for the organisations in question generally the largest single source of fundraising income (Appendix 2, monthly giving overview). Also, the money raised has no, or limited, earmarking. Other fundraising streams, such as major donor or corporate fundraising often generate income earmarked for a specific selected part of the organisation's work.

The lack of earmarking makes this income from monthly donors extremely valuable to the organisations, as it gives flexibility in the usage. But more importantly in the context of this study, it allows - and even calls for - a strong holistic organisational representation when making case for support to these donors. Monthly donors support the organisation's overall work and therefore, can be argued, should be receiving holistic and unique communication about the organisation, its mission and work.

6. EMPIRICAL DATA

Below follows an account of the key data from the interviews and participation at events. To put focus on the empirical findings rather the individuals and the organisations they represent, I have chosen to present the organisations in anonymous form.

The data is presented under headlines of key observations and findings starting with an introductory 1) ‘Atmosphere and setting of the interviews’ followed by five topics covered in the interviews: 2) ‘Views on fundraising propositions and uniqueness’, 3) ‘Strong milestones defining the identity’, 4) ‘Sources and influences for the Case for Support’, 5) ‘Actors and decision makers’ and 6) ‘Case for Support as dynamic process’. Whilst not following the exact sequence of questions in the interviews, it provides a full account of the collected information.

The brief organisational descriptions below are meant to provide a minimum organisational context within which to understand the specific comments and quotes. Facts and statements are mainly taken from the organisation’s own websites.

Organisation A

History and scope of work:

Founded in Austria in 1949, it is the world’s largest organisation to take care of orphans and abandoned children, and to give them a home, a family and education. Beyond the direct care for orphans and abandoned children, it also runs schools, social centres, vocational trainings, youth centres and health clinics. In addition it works in the communities around the villages trying to prevent children being abandoned for reasons of e g illness and poverty. Such interventions include everything from education and health care to micro credits and support to start a business or agriculture. The organisation is politically and religiously neutral and works long term to realise the UN Child rights convention.

Global presence: 132 countries and territories

Global turnover: 350 Million Euro (2006)

Funds raised in Sweden (excluding government contributions): 210 Million SEK (2008)

Organisation in Sweden: Around 25 staff members (primarily fundraising and communication functions), 8 local volunteer groups, headquarter in Stockholm. Member of international network.

Core fundraising proposition to the market: Child sponsorship. The donor gives a SEK 200 per Month and is linked to a specific child. Personal communication is possible between the donor and his/her child. A child usually has several sponsors. The income from child sponsorship is used for the entire programme in the village.

Organisation B

History and scope:

The organisation works on behalf of the UN to realize children’s rights. Since 1946 it has fought for all children’s right to survival, protection, development and participation. Its task is to create sustainable change, not just for a few children in one village or in one country, but for all children all over the world. It helps all children, regardless of colour, religion and ethnic belonging. The areas of work cover: Fight against poverty,

Fight for Children's right to survive and develop, Fight for children's right to education, Fight to stop the hiv/aids epidemic, fight to make world leaders take child rights seriously help children in war and emergency situations

Global presence: Over 190 countries

Global turnover: Around 3 billion US\$ (~€ 2.4 billion)

Funds raised in Sweden (excluding government contributions): 414 Million SEK (2008)

Organisation in Sweden: Around 35 staff members (primarily fundraising communication and advocacy functions), 30 local volunteer chapters in Sweden, headquarter in Stockholm.

Core fundraising proposition to the market: A monthly giving programme where donors can sign up as 'Global Parents' giving 100 SEK/Month. A global parent supports children in need of help all over the world, not one specific child. The organisation states the most vulnerable get helped first. Regular updates on what global parents make possible are provided through the newsletter 'good news'.

Organisation C

History and scope:

The organisation was founded in 1919, a few Months after the first organisation had been established in England. It was then the first to speak about the rights of the child. Their claim was that all children should be heard and be able to influence their own situation. Children have the right to a life without violence and discrimination, a safe and healthy childhood and an education that provide knowledge and confidence. Together with other organisations it developed the UN Child Right Convention which was adopted by the general assembly in 1989. The Child Rights convention contains 54 articles and is based in four founding principles which today form the foundation for all our work, in Sweden as well as in the rest of the world:

- 1) All children have equal rights and value without discrimination of any kind
- 2) The best interest of the child must come first.
- 3) Every child has the right to survive and develop
- 4) The child has the right to express its views in all matters concerning the child

Global presence: Over 120 countries

Global turnover: Around 6 billion SEK (~ € 600'000)

Funds raised in Sweden (excluding government contributions): 392 Million SEK

Organisation in Sweden: 189 staff members (in programme functions as well as fundraising and communications) 87 000 members organized in 244 local chapters, 11 regional office, headquarter in Stockholm. Member of an international alliance.

Core fundraising proposition to the market: A non branded monthly donor programme asking the donor to give between 100-300 SEK/month. A monthly donor is contributing to the overall work of the organisation's and the fight for child rights. Regular updates on activities and results are provided through email newsletters and an annual report. Other, specific monthly giving schemes include 'sister' (supporting women and girl programmes) and 'disaster fund' (for emergency relief)

Atmosphere and setting

All meetings were held in the respective offices of the organisations. The three different offices were located within wider central Stockholm at carefully chosen practical, but not

exclusive addresses in Sundbyberg, Gärdet and Kungsholmen. The immediate impression of these offices was similar: light, modern, friendly designed spaces, yet without any expressions or signs of luxury. The offices were all dominated by open space solutions and shared rooms. The people I spoke with were in their mid 30s to early 40s. The ruling dress code one might call leisure chic. All in all the organisations HQ felt like toned down, less expensive, somewhat slower and quieter versions of advertising agencies.

The entire process of data gathering – from requesting participation, setting-up meetings, preparatory talks, actual interviews and follow-up clarifications and summaries – all gave sign of great openness and curiosity. The immediate response of all four organisations approached were positive, within hours I received *“of course we will set aside time and help you”* Org A. The openness and willingness to share was matched with a curiosity, interest in the subject and a eagerness to take in new ideas. *“And of course I’d like to know if we can read it once it is finished. We always have a lot to learn”*, was the reaction of the 4th organisation which in the end could not participate. More than once the questions were turned around *“What is your experience here?”* or *“What have you observed?”* Org A.

The interviews were held in November-December 2009. This is typically the most hectic time of a traditionally seasonal fundraising year, with the generous Christmas period still representing an over proportionate income period. The four people I met were all busy senior managers. Pre-meeting communication and planning included the usual tricks such as calling off-hours to get through the obstacles of back-to-back meetings and friendly but protective personal assistants. Still, once we had the appointment for the interview these all resulted in calm conversations lasting around an hour.

Respondents gave a strong sense of a special culture within the sector, being sharing and open. *“In my former job in the commercial world, I would definitely have said no to such an interview, but I am learning that this sector is different.”* respondent from Org C, who initially hesitated about participating.

Views on fundraising proposition and uniqueness

The quest for uniqueness and the challenge to properly communicate unique cases for support was mentioned spontaneously by all respondents. An acknowledgement of the identity blur between the organisations was expressed as a concern. There was quite a strong sense of self criticism both for the individual organisation *“We haven’t really had a communication strategy for the last years”* Organisation A, as well as for the sector as a whole. *“If I was a donor I would be really confused, we all look alike and we all copy one another’s expressions and concepts”* Organisation C.

The lack of perceived distinctiveness in the fundraising propositions was seen as a problem and a task for the sector as a whole to tackle *“this is also an area I could see FRII (the umbrella organisation) play a strong role.”* Org C.

The comment on voluntary organisations 'stealing' or at copying each other's practice and expressions is supported by the role and functioning of the key events. Ideas and examples are shared on a very practical level, with newcomers often reacting to the open spirit by which things are shared often openly and the practical level of sharing ideas and examples

Reflecting on this topic, two of the respondents entirely unprompted mentioned the possibility of developing in the exact opposite way. Instead of sharpening the distinction between the organisations the sector may actually be ripe for some mergers and acquisitions, combining organisations with close mandates and mission. These thoughts came quite quickly but in both cases were turned away with quite a passionate assurance that, actually, the organisations are distinct, it is just not getting across clear enough.

Yes we are different, and in the programmatic work we know our roles very well. *"In the field, everybody seems to know exactly where the borders between one and the other are and who does what."* Org C

Strong milestones defining the identity

When asked to describe their own organisations, all respondents quickly, easily and convincingly described the milestones and historic moments that shaped the organisational identities. The descriptions covered founding principles and major milestones changing or ascribing new roles for the organisation.

These milestones were seen as not only as central but as something truly unique to the organisation:

"Our uniqueness lies in how we work our role and ability to influence. And the difference here is that is not just us making this claim. It is actually written in article 45 of the child rights convention" Org B

The unique characteristic was also described as something quite exceptional or even revolutionary

"The (founding) idea - at that time revolutionary - was that no child should be growing up in an institution" Org A

The radical aspect of the organisation and its identity was also mentioned by organisation C:

"We were founded by a group of women who reacted against the poor ways in which children of the war were treated. Their view was that children should not suffer because of adults making war and they really took a strong stand for this. And these were times when women didn't even have a vote! That, to me, is an incredibly impressive part of our organisation."

Sources and influences for Case for Support

Each organisation gave sharp and convincing summary of the Case for Support for a Monthly donor. The “elevator speech” was well developed and as it appears well spread and shared within the organisation.

When it comes to how the case is developed and the influences for turning this in to marketable fundraising propositions the responses differ strongly.

Organisations A and B had an explicit market orientation. Independently using expressions such as having the “ear to the ground” and communicating what resonates with the donor audience.

“It is about meeting needs in the market... donor insights.... delivering recognition and relevance” Org A

They both had developed structures and processes for capturing market information such as trends and consumer surveys to influence the development of cases and messaging. It can be noted in this context that respondents in all three organisations had personal professional background in advertising and commercial marketing so such a market orientation is something they would all personally be very familiar to. In all interviews there was a strong presence of marketing expressions and references further underlining the professional familiarity with such an approach.

Nevertheless Org C argued quite differently. *“When I arrived here I tried to work more actively with trends and similar. But it just doesn’t work that way. Our work is so long term, we cannot change things quickly based on market wishes.”*

Aligned with this, the starting point for a new campaign reflected this. In Org B the marketing department searched and reviewed topics which were judged to “resonate with the market” whereas Organisation C started with priorities from the programme staff, suggested as campaign themes.

For Organisation A and B, the inspiration and driving forces behind the formulation of cases of support and organisational identities were clearly in the first place the external environment. Sometimes referred to quite generally as “the market”, sometimes with specific mentioning of the donors or specific audiences and target groups

“We appeal to slightly more high income, more male donor audiences, and I believe there is a lot of potential there.... it would be silly not to explore that” Org B

This is in line with observations made at the key fundraising events where focus is almost exclusively on fundraising techniques and external environment. The International Fundraising Conference 2009 offered 37 different workshops which ran repeatedly over 3 days. Of these one (1!) was about the cause and how to present it (fundraising proposition). The others were split in fairly equal shares across Techniques and External

environment/Donor behaviour. At the Swedish Fundraising Conference no session directly addressed the case, the product, proposition or similar.

Whereas for organisation C the development of substance in the Case for Support and campaign messaging came from within, rather than with market resonance in mind, they mentioned the use of market research to listen to donors and ensure they were satisfied. Based on such feedback key aspects of the communication were adapted including communication channels and style, but not the topic and or focus.

The more radical aspects, the identified milestones and defining moments described above do not feature explicitly in the case expressions. They are expressed more in terms of solution and what is done then based on the principles behind it.

“The basis is the most vulnerable children. We give them a home, a family. Long term thinking is natural part; we take care of them until they are ready to stand on their own feet, just like in an ordinary family.” Org A

“It is the feeling of being part of something bigger, the link in the chain of people who care and make a difference for children every day year round, everywhere, on every level, everywhere. Working for all children. Taking a bigger responsibility” Org B

“Thanks to you, we can help the children who most need it in Sweden and in the world so that they don’t get dependant on charity but creating long term solutions for them to get an education, protection, and right to survive. You are part of all of that“ Org C

The fact that the fundraising proposition is less “edgy” than the organisational history would allow is underlined by the respondents

(on the revolutionary aspects....) “in the communication we have lost that” Organisation A

“..... We are really a true child rights organisation, with voices raised and with a fighting spirit..... This is our soul, and it still is reflected in our soul - but we could be much clearer in this.” Org C

Actors and decision makers

The direct involvement of programme colleagues in the creation of a Case for Support of marketable propositions seems to be rather limited. The role of identifying the core issues internally lie typically with the marketing / fundraising department. In the case of organisation C, the plans and priorities are provided by programme colleagues but the selections and decisions made by marketing department.

Partner agencies have strong voice and prominent role in development process with. All organisations stressed the importance of building strong, and long term, relationships with agencies *“We have very ambitious training and education programme with our external agency partners. This is something I am proud of. For example our advertising agency sits*

here whole days to meet programme colleagues. It has really helped create a deep understanding and strong relationships” Org C

Before I got here there were a lot of changes. Since I arrived we have stable partners. To me this is important. We invest so much in getting them to know us and making sure they are engaged, proud and feel they are making a difference”

Case for Support as an organic process

“Must be a living document, cannot be static” Org B

None of the organisations interviewed pulled out a written, printed document with Case for Support written on it. Yet all grasped the idea of such a concept and comfortably related to their own Case without having a specific document at hand.

The respondents expressed confidence in the case as a fairly well defined concept used for instance at briefings of agencies or other external partners. Similarly was there agreement and confidence in the internal agreement and spread of an understanding of such a case. Rather than a printed document, the case is referred to as a flexible concept, in the shape of various components (brand book, communication strategies, programmatic plans, etc) which may shift or change over time.

7. ANALYSIS

In this final section I will try and distil some learning and insights from the empirical data with the help of the chosen theoretical knowledge bases. In doing so I hope to respond to the research question I set out to explore, how a fundraising Case for Support is being created.

I will start with reflecting on two key observations and end by proposing a conceptual model as a tool to better understand how organisations go about creating and developing their Case for Support.

7.1. External powers

The voluntary sector is very clearly embracing commercial marketing skills and practices. There is a strong sense of marketing principles dominating the fundraising communication. The words ‘market research, donor relevance, market, agencies’ etc outnumbered by far internally focused references such as ‘programme, beneficiaries, field priorities’ and similar.

This professional capturing and adaptation to the donor/market wishes may well be a strong contributing factor the overall growth of the sector. It is, most likely, providing what the market is asking for. However, could the external focus possibly also contribute to the described market blur between organisations, the difficulty to find and communicate that distinctive edge? Can the effort to ‘put the donor in the centre’ make an organisation lose some unique identity features that come from within and can only be found by looking inward?

This is dramatically provoking a thought in a business where the entire sector speaks of the importance of giving more attention to the donor and my suggestion is definitely not to move away from the donor. But the theories of Organisational identity (e.g. the dynamic identity model of Hatch & Schulze, 2002) as well as those of Case for Support creation (three elements pointed to by Sergeant 2004) however suggest a need for balance between the internal, inward looking seeking substance and the external, outward looking seeking relevance and market input. The reality observed seems to be closer to Hyper-Adaptation than to Narcissism. In an extreme form, this could create ‘gimmicky’ fundraising - all centred around the donor with a potentially replaceable cause as recipient and a bland competitive landscape of voluntary organisations as a result.

Organisations may be underplaying the power of the voluntary sector as influencers and not just reflectors of personal values and identities. Using the ‘mirror’ more than the ‘lens’ will keep donors temporarily happy but not move beyond what the market knows it wants. As Arnett, German and Hunt (2003) show, the voluntary sector has the power to not just reflect but contribute to building the donor’s identity, which match the one of the organisation.

7.2. The lost revolution?

In the three organisations studied there seems to be a missed opportunity to exploit historic and cultural uniqueness in the creation of organisational identity and presenting this to the donors as distinct features of their Case for Support. Historic milestones and radical ideas that

have shaped the organisation programmatically are still very much present in the minds of the marketers. But it appears such features are currently not made explicit in the donor propositions. Or at least they far from reflect their radical edginess. The current focus is much more on the action and the solution, than on the founding revolutionary idea.

For instance, Org A was founded on the strong belief that children should not be in institutions, something which still serves as a cornerstone for their work. But in terms of the case made to donors, the focus is instead on the delivery of a solution, i.e. the care provided for the individual child. In the case of Org C the founding idea of helping children regardless of nationality, religion and ethnicity is still central. However, this non discrimination principle is part of its case, but not highlighted as a politically radical – and bold – idea. Today it is more positioned as a soft democratic and kind act of inclusiveness.

A possible reason for the radical aspects of the organisational histories not being more exploited might be that radical actually brings with it controversy. It brings with it taking a stand for something or against something. And this means some people will be on your side, others will not. In terms of fundraising one may however fear that the potential donor group will be more limited.

Consider the example of organisation C. Back in the days of 1919 helping children of the besieged as well as winning nations was something controversial. One for which the founder was even charged with antinational behaviour and sentenced to pay a fine. Her own response to this event was that she would happily go to prison, if that was the prize to pay for the principle that she so passionately fought for. That is controversy. It comes at a prize. But it also gave birth to the organisation. Now the question is if these principles still should be used as sharp edged facts for more radical positioning creating fundraising distinctiveness in the Case for Support? I would suggest they could. Some of the principles, if taken to their edge, still need a fighting spirit to turn them into reality.

Hearing the representatives from all three organisations speak about their identity and what makes their organisation unique suggest there is substance enough for passionate radical propositions. If marketers would choose to make them a sharp advocacy statements this would certainly be possible. Implicitly the organisations however seem insecure if distinctiveness would have immediate positive returns. It may even be the contrary; by losing the general and broad appeal it could narrow the donor audience and potentially reduce income? The conditions of possible benefits of such a newfound radicalism and distinctiveness would need to be carefully investigated. The loss of some periphery supporters may for instance be compensated by intensified support from those closer to the core of the organisation and, in the long run, help attracting more donors convinced by the Case for Support.

7.3. The case for support – a model to find the organisational self?

The current understanding of the Case for Support is primarily market driven. In the state of affairs investigated in the three organisations the Case itself is not an explicit document, but

rather an understanding of a dynamic statement sometimes in the loose form of several sources. Reference is made to brand positioning, communication platform and place in the market.

It appears that the task of managing successful fundraising, including the creation of a strong Case for Support, demands a careful balancing act between mission-based ideas and market wishes. Today, the market wishes have a strong role. Although the mission based ideas are well placed in people's conscious understanding of their organisation they are less well reflected in the Case for Support practice. There is clearly no lack of knowledge or understanding of the mission and values of the organisation among marketers, something that programme staff would sometimes claim. What then would make marketers draw more on their knowledge of mission-bases?

I would suggest that a more systematic process of creating an explicit Case for Support could help an organisation manage a better balance and thus clearly identify its self. Going back to the very origins of identity studies I draw upon Mead (1934) and his 'I' vs 'Me' and inspired by the later interpretation by Hatch and Schulz (2002), how could these fundamental aspects be used for organisations today to create a strong and truthful Case for Support. Or, using Mead's term; a strong a truthful Self.

The 'I' of Mead could be seen as the Mission in an organisation. This is the key 'raison d'être' of every organisation. The mission is often known in the form of a Mission statement which is the explicit part, i.e. what the organisation shows to the world. The implicit part of the mission is the very reason the organisation once was formed and the drive why people join and work for the organisation. These are deep philosophical and cultural layers of the organisational identity.

Mead's 'Me' in my suggested application of his thoughts for fundraising is the Market. This represents the donor and future donors and this side is full of middle men such as market research institutes, consumer communication specialists, trend watchers and others with the claim of understanding the market.

The new suggested model in Fig. 6 below, which builds on Mead's notions of I, Me and Self could be a constructive tool for an organisation to create its own explicit Case for Support. By addressing and using the two key drivers openly and systematically there could be a more constructive discussion on the respective influences and choices made.

Once developed, the Case for Support cannot remain static. The case creation needs to be a continuous and dynamic process, as has been pointed out both by the interviewed practitioners as well as pointed out by the underlying theories. There is a need to redefine mission and market as our world and environment changes. But there is also a built in dynamics to expand the Case for Support itself. The job of the fundraiser is to maximise support for the organisation and this must be done by making the overlap between Mission and Market as broad as possible.

The limits of the Case for Support make up the frontline of fundraising. This is where expansion and new fundraising propositions can be developed. There is one limit where the Case for Support borders the market (A. in the model), another one where the Case for Support borders the Mission (B. in the model).

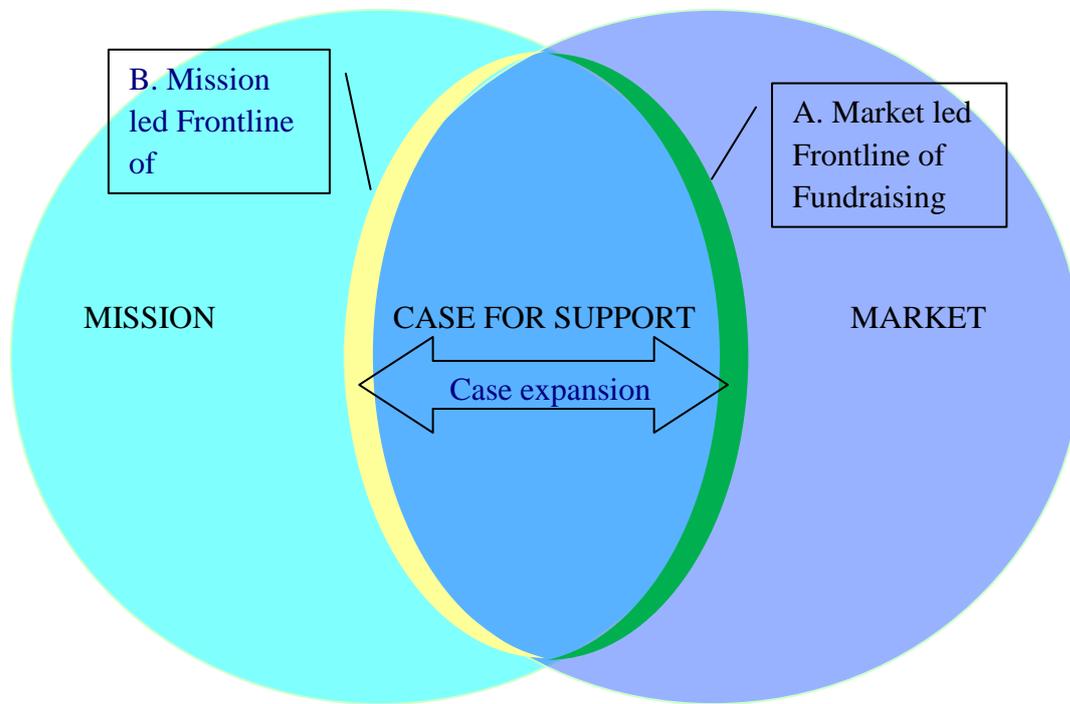


Fig. 6 Case for Support model proposed by the author
A conceptual framework for analysing the creation and development of a Case for Support

The frontline of fundraising is currently, in the organisations studied, focused on the border between Case for Support and Market – the Market led Frontline of Fundraising (A.). Fundraisers try to understand the market to create new fundraising propositions and thereby expand the case.

The border on the other side – the Mission led Frontline of Fundraising (B.) - is, I argue, less busy space. This is reflected in the untapped potential of radical features of the organisational history expressed above. Exploring this side would require fundraisers digging into, and increasing the understanding of their organisation’s Mission in order to create new propositions for the donors and thereby expand the Case on that end.

Could this be the new frontline of fundraising? Could organisations successfully expand by increasing their understanding of their mission and create new fundraising propositions? It would take new ways of working, and new expertise. Instead of market researchers, the sector may need to employ historians to identify and understand the organisation’s distinct historic land marks. Instead of trend watchers we may see organisational anthropologist to find the true cultural uniqueness.

If this were to be the future, there are reasons to believe that it would bring about more distinct cases. While the market is, at least to a high degree, shared between organisations, the mission is not. Focusing on what the market tells us, risks leading to more bland propositions which can be copied by other organisations. If propositions were to be built on deeper understanding of the mission, the propositions would have closer tie to the unique mission of the organisations, be less transferable to others and subsequently could help organisations be more distinct.

8. CONCLUSIONS

The lack of differentiation between the fundraising propositions of voluntary organisations is recognised as a problem among decision makers in the sector. This confirms my own introductory observations. But at the same time, the fundraisers themselves identify strong distinct features in their organisational mission, history and values, currently not fully reflected in their fundraising Case for Support. There is a shared sense among the fundraisers that there could be opportunity to explore these further.

The Case for Support of the organisations in this study is a relatively loosely defined and organic notion. The process of developing fundraising propositions is intuitive and led by a few decision making marketing managers strongly influenced by anticipated market appeal, expectations from donors and behaviours of potential future supporters. Such market forces are often interpreted with the help of external partners, e.g. market research or advertising agencies.

The study suggests that creation of a successful and distinct fundraising case is a balancing act between Market and Mission. Introducing a model, influenced by Mead's thinking around the 'Self' created by the 'I' and the 'Me', it helps understand how voluntary organisations articulate their Case for Support. The model is meant as a descriptive tool in that it makes explicit the sources (and forces) and helps analyse the Case for Support, but could potentially also be used normatively in the actual development process. With one root in academic work of philanthropy and organisational identity and another in the day-to-day reality of fundraising practitioners, it is my hope the model and the findings of this study could serve both a deepened intellectual understanding of fundraising and, in its practical application, the development thereof.

In a normative use by fundraising practitioners the model could help an organisation articulate the market and mission driven components of their Case for Support and plot them into the framework. Such an exercise can illustrate and analyse the position of the key features currently at play in the organisations fundraising as well as point towards gaps and opportunities that could be explored in future.

The organisations in this study are currently predominantly considering market driven influences in their cases for support. It is reasonable to expect a similar pattern for many other key players in the sector. Yet, for some organisations, the contrary might be true in that the fundraising case is dominated by mission driven influences and not fully exploiting market inputs. In either way the model could help organisations clearly define, debate and evaluate the options. Choosing components solidly placed in the midst of the overlap between mission and market influences would ensure a Case for Support that is both attractive and distinct.

The Case for Support is found to be a dynamic concept and in order to capture this progressive aspect the model also highlights the current 'frontlines of fundraising'. It shows how there could exist new opportunities for voluntary organisations to expand their Case for Support and innovate fundraising by exploring the mission, their history and principles,

including some revolutionary founding ideas they all possess. This could help develop sharper, better differentiated and more unique fundraising proposition. In its extension it could contribute to a more distinct fundraising landscape, less imitation between organisations and ultimately clearer options for the donor.

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Appendix 1 Glossary

The list is meant to facilitate reading by providing quick reference and explanation of some key technical terms and expressions used. Definitions vary and this list carries no ambition of universal application beyond this study.

Beneficiary – the person, object or interest benefitting from the voluntary organisation's work

Case for Support – a description the cause and the (voluntary) organisation; Who it is, what it does and why a donor should support it.

Cause – the purpose of an organizations and the subject for which it seeks support

Committed giving – regular normally monthly giving which the donor signs up to make automatically (e.g. by credit card, automatic transfer)

Corporate fundraising – Fundraising from and with companies. Can involve a variety of methods, e.g. cause related marketing, philanthropic giving, sponsored events, some of which raise money directly from a corporate budget others from 3rd parties through the companies outreach (e.g. employees or customers).

Donor - an individual or organisation that makes a financial contribution to a voluntary organisation

Fundraiser - a person who organises and orchestrates income generating activities for a voluntary organisation

Fundraising – soliciting financial contributions for a cause

Fundraising proposition – a market offering with an opportunity to support a cause in a pre-defined way, packaged by the fundraiser to appeal to certain audiences, campaigns and channels

IFC – international fundraising conference. The most important international annual fundraising meeting organised by the Resource Alliance, a UK based organisation working to build global fundraising capabilities

Major Donor – individual donors contributing significant amounts and managed by fundraisers through personal cultivation and face-to-face solicitation

Mission – the very core reason for an organisation to exist and what it is striving to do to forward the cause

NGO- Non-governmental organisation

Non-profit organisation – an organisation set up for a public good, without interest of making financial gains

Philanthropy – an act of generosity towards a person or cause without the expectation to receive any benefit in return

SFI – Sveriges insamlingskontroll, fundraising monitoring organisation in Sweden who issues and controls the official 'quality seal' 90-accounts

Supporter – an individual or organization that supports the cause actively, as a donor or by other means, e.g. volunteering, advocating, endorsing, buying goods or services etc

USP – Unique selling proposition, a marketing term also frequently used in fundraising to describe a proposition made to donors which is distinct from those of other causes

Voluntary organisation – an organisation funded through voluntary support serving a defined cause

FRII – frivilligorganisationernas insamlingsråd, the Swedish fundraising council. An umbrella organisation with the mission to promote ethical and professional fundraising and improve the conditions for fundraising. Organises meetings and trainings such as the annual national fundraising conference insamlingsforum

Appendix 2 Monthly giving overview

Organisation	Income from monthly giving SEK million	Total funds raised SEK million	% of funds raised	Number of monthly donors
A	133	209	64%	62,000
B	117	432	27%	92,000
C	150*	392	38%*	89,000
D	180	206	87%	80,000

All figures from 2008 annual reports

* Estimate based on 89 000 Monthly donors

Appendix 3 Questionnaire

Semi structured interview form with Fundraising Directors

Opening statement:

- My interest is in processes, the sources and ways fundraising communication is created and how the fundraising “case for support” is formed. Not analyzing specific outputs or campaigns.
 - Focus on monthly donors because they represent an important group with whom we all communicate frequently and openly, but still as a collective (not individual like corporate or major)
1. Please briefly present “*the organisation*” to me. Take me through the mile stones and events which in your view have created and shaped the organization.
 2. Think about a recent or upcoming major campaign (TV, mail, web or similar) to recruit monthly donors, which you personally are happy with. Please describe steps and process overall.
 - i. How are theme and messages elaborated?
 - ii. Who is involved (external/internal)
 - iii. Final is the decision maker?
 3. What do you include in the briefing of an external partner such as an advertising agency or external fundraising supplier (telemarketing f2f or similar)
 - i. Core documents or other material? Do you have a written ‘Case for support ‘ or similar that you use?
 - ii. What are the key factors that you use to inform this: market research, programmatic events, other internal or external documents, publications, developments etc
 - iii. Do you work with the same agency(ies) over time or change regularly?
 4. How do you make sure to stay up to date and capture market developments to adjust you case? (E g trends, donor research, other methods)
 5. How would you describe the unique identity, role and impact of your organization vis-a-vis other organizations working for the wellbeing of children?
 - i. How would you say are such specific values identified, debated and shared across your organization?
 - ii. Is there something in your organization’s principles and values which you have consciously not focused on in fundraising communications (perhaps because it is considered less easily understood or even less attractive to donors)?
 6. Thank you for your time and your insights. Wrapping up conversation:
 - i. Is the whole issue of differentiation (or lack thereof) between organizations relevant. Is this something you think about and discuss in your daily work?
 - ii. Is there another question which you think I should ask?