

Stakeholder Forum 'The donor challenge'

OSCr

Tris Lumley, Senior Analyst
New Philanthropy Capital

CHARITY
COMMISSION



- Reporting should satisfy donors' needs...
 - ...but it doesn't

Donors matter because:

- “Defining class of user” of accounts & reports
- Public trust in charities is falling
- Reporting underpins accountability & transparency
- Reporting can inspire donors to give

- Donors and funders range from
 - Professional funders, including government
 - High net worth individuals
 - Payroll & regular givers
 - Unplanned givers
- There is no 'average' donor
 - Motivated by head or heart
 - Inspired by human stories or social returns
 - Some trust charities, some are sceptical

- Is the organisation sound?
- Where does the money go?
- What's the role for my funding?
- What does the work achieve?

Don't just answer the questions donors ask!

- Costs don't tell us much
- Finances only part of reporting – results are what matters
- Reporting back, looking forward

- Cater for a range of donors
 - From rapid overview...
 - ...to detailed due diligence and updates
- Build on SORP's requirements & recommendations
- Use reporting as a platform to inspire