

# Comparative Research on Collaborative Philanthropic Fundraising in the United States and China

2021

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## Preface

This report seeks to sort out Chinese and American collaborative fundraising practice, extract local and international experience, and provide Chinese local institutions with collaborative fundraising strategies and practical recommendations based on China's conditions. Combining domestic and foreign literature review and empirical analysis, this report deeply discusses the feasibility and operability of collaborative fundraising in the local environment and further proposes local strategies and action suggestions for the Chinese philanthropy industry. Our special thanks to Ai Jin, a doctoral candidate at the Lilly Family School of Philanthropy at Indiana University, for her strong support and selfless investment in the report. She has invested a lot of time in sorting out and analyzing the international joint fundraising model, and writing and summarizing cases. She put forward professional opinions and suggestions and provided technical support such as tool design and data analysis for the questionnaire survey.

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About FIDC:

The Fundraising Innovation Development Center (FIDC) is committed to promoting the professional development of China's charitable fundraising, advocating and cultivating a healthy giving culture by providing high-quality knowledge content, lowering the threshold of knowledge acquisition, and innovating capacity-building models. Our clients vary from fundraising platforms, public-fundraising foundations, corporate foundations, overseas foundations, private organizations, and industry platforms. The FIDC has released several insight reports introducing international fundraising textbooks and the Certified Fundraising Executive (CFRE) in recent years. We attach importance to responding to social issues, carrying out fundraising ethics, and giving culture advocacy work. Every year, the China Fundraising Professionals Forum enjoys a good reputation due to its professional content and practical value.

Further information is available on our website [www.cafpnet.cn](http://www.cafpnet.cn).

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## **Introduction: a brief history of collaborative fundraising model.**

### **International development of collaborative fundraising.**

Collaborative/coordinated fundraising is a model of action in philanthropy that originated in the United Kingdom and further developed in the United States. The most representative of these organizations is the United Way.

The nonprofit sector has played an essential role throughout US history. As the country's third-largest labor employment industry, the non-profit sector has undertaken many public service functions in the American community, with support mainly from private resources rather than the government.

Meanwhile, collaborative fundraising has developed rapidly with the recognition of community service and collective participation in American society. However, under the influence of social progress and changes in science and technology, the model has witnessed many structural innovations as well as some drawbacks and challenges. Firstly, non-profit organizations bear a heavy burden on social services due to tax policy changes and government shirk. Organizations derive their mission to scale-making rather than solving ever-changing social problems. Secondly, extreme income inequality has exacerbated the monopoly of business capital on the development of philanthropy, and the Matthew effect is becoming more pronounced in the non-profit sector. In addition, collaborative fundraising organizations like United Way face dual pressure from internal management and external donors and rivals.

### **China's development of collaborative fundraising.**

China has also experienced its own unique evolution of collaborative fundraising. In 2009, Shanghai United Foundation was officially founded as the first organization that explicitly uses collaborative fundraising as its main model. In the past few decades, the rise of Internet philanthropy has provided technical support for philanthropy courses and the popularization of collaborative fundraising. Nationwide fundraising activities represented by Tencent's 99 Charity Day have further expanded the collaboration with low threshold participation restrictions and incentive mechanism of matching donation. Nowadays, China's collaborative fundraising model has emerged a new look compatible with international experience and local innovation.

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1. Organizations share their public fundraising licenses<sup>1</sup> with partner institutions to conduct collaborative fundraising.
  2. Foundations provide partner institutions with existing brand projects to carry out collaborative fundraising.
  3. Regional or community organizations initiate and carry out collaborative fundraising supporting their own community. In this model, organizations are both fundraisers and beneficiaries.
  4. Organizations join collaborative fundraising based on a common issue.
  5. Foundations initiate projects with the standardized procedure, and local organizations carry out face to face fundraising towards various stakeholders. This model is very common in the field of medical care.

## **Differences of collaborative fundraising in the United States and China.**

In comparison, China's development of collaborative fundraising is entirely different from the US trend due to various factors such as policy, technology, society, and economy. The core differences are mainly reflected in:

1. Source of donation - collaborative fundraising in China mainly relies on establishing a joint funding pool of partner organizations and related income such as corporate donations or network traffic. In contrast, organizations in the US mainly rely on membership fees and funds from foundations and the federal government. Each organization reserves fundraising income under its own model.
2. Fundraising goal - the purpose of American collaborative fundraising is to better pool resources to solve social problems, from joint projects to joint fundraising. In China, the major purpose of cooperative fundraising is to expand the scale and service capabilities of the foundation's existing brand projects, and little consideration is given to local organizations' own project-level cooperation.
3. Nature of collaboration - The essence of American collaborative fundraising lies in the share of social resources among organizations, while Chinese organizations embrace collaborative fundraising based on limitations on public fundraising

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<sup>1</sup> In China, only organizations with public fundraising license (certified by the Ministry of Civil Affairs) can conduct fundraising activities towards the public.

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qualifications and organizational legitimacy.

4. Definition – China’s model is more about the collaboration between non-profit organizations and foundations with public fundraising qualifications. Partner organizations still need to carry out their own fundraising activities to raise funds for themselves, and there is a lack of shared philanthropic goals between headquarters and member institutions. In the United States, it refers to a partnership alliance between donors or non-profit organizations with common needs. Collaborative fundraising institutions conduct unified fundraising for non-profit organizations and distribute funds for donors. Partner nonprofits are not involved in fundraising activities, rather simply receive donations through membership.
5. Stimulation - the American collaborative fundraising model reflects self-value by improving its professional competence and expanding the influence, while the Chinese model uses matching donation leverage and basic operational training to stimulate the short-term fundraising performance of partner organizations.

## **Case analysis: collaborative fundraising experience and strategies in the United States**

### **United Way: collaborative fundraising among regional communities.**

The United Way Worldwide is a non-profit organization led by volunteers with three main focuses on healthcare, education, and income stability. With a mission to improve lives by mobilizing the caring power of communities around the world to advance the common good, the United Way Worldwide leads, supports, and participates in cooperative and inclusive community activities, focusing on capacity building and resource mobilization, improving local community life, and promoting positive and long-term social changes.

For more than 130 years in operation, the United Way has established more than 1,800 local institutes in 41 countries and regions worldwide. The Global Federation leads member organizations in providing services and managing international grants and supports newly created United Way charities around the world. Member organizations often carry out actions based on their specific community culture and environments, following unified standards and requirements. With a known reputation in the field, the United Way helps organizations conduct charitable activities and fundraising and shares successful experiences across member networks. In addition, relying on its diversified volunteer pool, the United Way provides organizations with voluntary services and solves practical problems with rich perspectives.

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In 2006, the United Way Worldwide established its global standards for all member organizations. They clarify the performance standards, provide practical professional experience, and establish an implementation framework with an operational toolkit for member organizations. All members must comply with agreed standards, including financial reporting, organizational governance, ethics, diversity, equitable and inclusive operations, and related requirements for operating funds.

### **Operational structure:**

The United Way traditionally used the federated/franchised fundraising model<sup>2</sup> - an organization that represents its member organizations and raises funds through annual fundraising activities. Each United Way branch served as a platform with a bottom-up operation hierarchy. Local non-profit organizations could pay membership fees to the United Way system in exchange for membership to use the United Way brand carry out fundraising activities and receive donations. In addition, the local organizations could apply for practical training and education and operational support from the global United Way system.

In the early 21st century, the United Way transformed its model into a community impact model - from acting as an intermediary hub between donors and members to a local-oriented organization dedicated to bringing far-reaching impact to local communities. Local branches no longer provide grants according to the needs of member institutions but cooperate with local organizations that can best meet the needs of the community. This change emphasizes coordinating local resources, providing targeted social services, and promoting regional development. Many local United Way branches have adopted the new community impact model in practice, while some continue using the traditional franchised fundraising model due to the differences in historical and cultural traditions, economic levels, and leadership styles.

In addition, the United Way has set up the International Donor Advised Giving (idag) to provide companies, foundations, and individuals around the world with a comprehensive and simplified donation system service. Since 1999, the IDAG has received 7,000 donations for US\$300 million and benefited 110 countries around the world.

### **Fundraising model:**

United Way's income mainly comes from donations, together with other membership fees, project service income, investment income, conference fees, and sales of peripheral goods. In 2019, United Way's donation income was US\$195 million,

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<sup>2</sup> Paarlberg, L.E. and Ai, J. (forthcoming). The United Way, in Kearns, K.P. & Wang, W.J., eds., *Encyclopedia of Nonprofit Management, Leadership, and Governance*, Edward Elgar Publishing Ltd.

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accounting for 78% of the total annual income (US\$250 million)<sup>3</sup>. In terms of expense, the Donor Advised Giving module is the main expenditure of United Way. Taking 2019 as an example, the donation project expenditure was US\$168 million, accounting for 65% of the total expenditure of US\$256 million in 2019. In addition, The United Way has invested in digital services since 2018. In 2019, it has spent 11.2% of its total annual income on digital service building.

### **Inspiration for China:**

United Way's primary source of income comes from its workplace giving with 75,000 global businesses<sup>4</sup>, which are generally carried out in the form of employee volunteering (donation of time and skills), employee donations based on corporate channels, enterprise matching donations. According to the *Goodness Engagement Study* released by Benevity, companies carrying out workplace donations have a significant impact on reducing employee turnover and improving employee retention.

In China, the philanthropy industry faces a more primitive problem – with the rapid development of internet fundraising, how to persuade companies to make workplace donations and mobilize employees to donate. Mainstream Internet fundraising platforms in China, such as Tencent Philanthropy and Ant Financial Philanthropy, are using ‘enterprise donation together’, walking donation, and other behavioral philanthropic products, to leverage and cultivate the awareness, actions, and habits of corporate donation.

For non-profit organizations, the automatic deduction of employee wages used to be the most attractive donation method. However, due to the complexity in process and inter-departmental coordination, and a lack of corporate donation culture in the workplace, only a small number of companies and foundations are jointly promoting this way of donation. On April 11, 2019, Alipay issued the first personal donation electronic invoice, which greatly simplifies the process of inquiring, issuing, and sending paper donation invoices, making it possible for a tax deduction. This can also increase the willingness of employees to respond to the company's call for donations.

In addition, the implementation of the personal income tax declaration APP supporting the personal income tax reform has also given more imagination to the philanthropy industry. With the optimization of policies and the development of technology, it is entirely possible that workplace giving will become the next flashpoint for the growth of social giving in China.

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<sup>3</sup> Source: United Way Worldwide and Subsidiary Consolidated Financial Statements and Supplementary Information, 2017-2019.

<sup>4</sup> Source: United Way Worldwide and Subsidiary Consolidated Financial Statements and Supplementary Information, 2017-2019.

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## Share Literacy: collaborative fundraising with local volunteering<sup>5</sup>.

Share Literacy is a charitable project initiated by The Institute for the Study of Human Knowledge (ISHK) dedicated to improving the reading ability of children in the United States, especially children from vulnerable communities.

### **Operational structure:**

The project adopts a loose membership structure with cooperative volunteer groups in eight regions across the country. As the backbone of Share Literacy at the regional level, volunteer groups are responsible for fundraising and researching valuable partnership programs. Regional branches led by volunteers also collaborate with local organizations for project design. Therefore, Share Literacy enriches its collaborative fundraising value through donations to both the Share Literacy project and regional subprojects.

Share literacy provides great operation freedom to local volunteer groups, ranging from identifying fundraising goals to project design and implementation. Limited services are given to partner volunteer groups:

1. Fundamental financial management support;
2. Give out some free children's books and purchase with discount;
3. Monthly consulting conference for project Q&A;
4. Basic training for volunteers.

### **Fundraising model:**

According to Steve Whitney, taking his team as an example, when they found that the key factor in improving children's reading lies in the participation of parents, they began to actively seek to create conditions for parents to participate in reading with children. Through mass mailings from the community, they contacted the non-profit organization responsible for operating the government's low-rent apartment and successfully won a free apartment room as a reading room, where parents and children can participate in reading activities together.

Also, when they needed to raise the cost of books, they would contact platform-based organizations in the community such as Gift Fair, as well as their own acquaintance network resources to raise funds, such as conducting charity auction activities for used items, or entertaining friends at home to raise funds, etc.

Since both the target donor and the volunteer team are in the same community and

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<sup>5</sup> Case information comes from its official website <https://shareliteracy.org/> and interviews between the writer and the organization volunteer Steve Whitney.

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share some acquaintance resources with each other, the community-based fundraising activities initiated by local volunteers can easily gain the trust of the community, so as to achieve the fundraising goal.

### **Inspirations for China:**

Volunteers of Share Literacy share a profound knowledge of local resources since they all live in the community, and they often proactively seek problem solutions through collaboration. They represent themselves as local volunteers rather than Share Literacy and receive great local recognition. This autonomous management style fits perfectly for regional organizations with a known society. By setting a low management benchmark and limited services, Share Literacy reduces its operational pressure, stimulates regional energy, and mobilizes support among community members.

### **PTA<sup>6</sup>: collaborative fundraising with a dual identity.**

National Parent-teacher Association (PTA) is a registered 501(c)(3) nonprofit association that prides itself on being a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the public education. PTA comprises more than 4 million families, students, teachers, administrators, and business and community leaders devoted to the educational success of children and the promotion of family engagement in schools.

### **Operational structure:**

The connection among PTAs at all levels and teachers and parents in local branches form a national network of members representing all working with children and youth. On the one hand, the county-level unit becomes an invaluable resource for local school communities as it captures successful case experiences in other areas while spreading out local issues and needs through the national member network to influence policymaking. On the other hand, the national PTA network provides families and individuals with various supports, including resource packs, fundings and donations, and leadership and management training. In addition, the national PTA provides management training to branch leaders to ensure the sustainable development of local projects.

### **Fundraising model:**

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<sup>6</sup> The information of this chapter comes from the official PTA website <https://www.pta.org/>; Wikipedia [https://en.wikipedia.org/wiki/Parent%E2%80%93teacher\\_association](https://en.wikipedia.org/wiki/Parent%E2%80%93teacher_association); Candid-GuideStar webpage <https://www.guidestar.org/profile/36-2169155>; 2015-2016 PTA Fundraising Guide, available at [http://tnpta.org/btks/btsk\\_fundraising\\_quick\\_reference\\_guide.pdf](http://tnpta.org/btks/btsk_fundraising_quick_reference_guide.pdf), last accessed December 15, 2021.

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PTA's revenue mainly comes from membership fees and personal donations. Teachers and parents share various resources and conduct fundraising based on local needs by signing up for the PTA membership. On the national level, PTA has partnered with many corporate sponsors to provide funds and action plans for local branches. On the regional level, the school department can partner with the local PTA and conduct collaborative fundraising for school supplies. The local PTA also provides professional advice in finding corporate sponsorship or managing donations. Member parents and teachers often consist of the local branch, so they act as both the fundraisers and the beneficiaries. In addition, the PTA sets strict requirements and standards for each fundraising activity and emphasizes the organization's core value – attract more members and help more children.

### **Inspirations for China:**

A dual role of fundraiser and beneficiary drives inner motivation in project fundraising and stimulates collaboration between school teachers and children and parents with a mutual goal. PTA's strict regulation on fundraising activities prevents it from deviating from its mission during the fundraising process. In a word, member-based charitable organizations need to maintain a balance between organizational value and the fundraising result.

## **Case analysis: collaborative fundraising experience and strategies in China**

### **CCAFC: collaborative fundraising with license sharing<sup>7</sup>.**

Established on January 12, 2010, the China Charities Aid Foundation for Children (CCAFC) is a national public fundraising foundation under the Ministry of Civil Affairs supervision. In the past 11 years, the total fundraising has exceeded US\$549.399 million<sup>8</sup>, with nearly 70% accounting for personal donations. The CCAFC has rescued more than 7 million children in distress in 31 provinces<sup>9</sup>, municipalities, and autonomous regions.

### **Organizational development:**

In July 2011, the CCAFC established the Tongyuan Funding Project to support more

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<sup>7</sup> The Chinese Charity Law requires that only philanthropic organizations that have obtained the license issued by the government can carry out public fundraising. Those without the license can cooperate with such organizations in fundraising, and apply for funds from the funding pool according to the signed cooperation agreement.

<sup>8</sup> 3.5 billion RMB.

<sup>9</sup> Data from the CCAFC 2020 Annual Report.

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non-governmental charity projects. The project was the country's first continuous funding activity sponsored by the public fundraising foundation with nationwide bidding. In 2013, the CCAFC upgraded the project into Tongyuan Grantmaking Center – a national collaborative fundraising platform for children's philanthropy. Through online promotion and fundraising and offline social resources connection, the CCAFC provided support and services for those organizations without public fundraising licenses and helped them obtain start-up funds and complete project implementation.

With the rise of Internet fundraising in China, in May 2018, the CCAFC established the E Charity Alliance to provide Internet fundraising and dissemination support for charity organizations. In May 2021, the CCAFC made a significant adjustment and merged the Tongyuan Funding Center and the E Charity Alliance, formally establishing the Tongyuan Collaborative Fundraising Center, with a combination of grantmaking and fundraising model through internet fundraising<sup>10</sup>.

### **Operational structure:**

The Tongyuan Collaborative Fundraising Center receives donations of approximately US\$6 million every year from some funding companies and has partnered with some recipients selected by the foundation. It operates as a fundraising project collection platform of various organizations, providing multiple services, including sharing its public fundraising licenses, connecting with social resources, conducting internet fundraising educational workshops, etc.

### **Core advantages:**

This kind of joint fundraising model of public fundraising is conducive to the rapid realization of the scale of cooperative institutions and funds by the public fundraiser, and the expansion of the fundraising fund volume of the public fundraiser, thereby expanding the influence of the industry. Another important strategic positioning of Tongyuan Collaborative Fundraising Center is to build a cluster of various projects. It gives priority to supporting the strategic development needs of the foundation, especially after the strategic adjustment of the CCAFC in 2021, where the foundation clarified the 6 major project areas (growth, education, culture, environmental protection, health, and medical treatment). Tongyuan Collaborative Fundraising Center continuously expands, excavates, empowers and cultivates non-profit organizations by cultivating high-quality projects and institutions, and delivering them to the major project areas of the foundation. Through the internal promotion mechanism, partner organizations can be promoted to the foundation's cooperation projects, and even set up special funds.

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<sup>10</sup> Way of Collaborative Fundraising, Jingtao Liu, The Sustainability Research & Innovation Congress, May 5th, 2014, [https://mp.weixin.qq.com/s/BVnyELOhVtfA\\_Slou7yaHg](https://mp.weixin.qq.com/s/BVnyELOhVtfA_Slou7yaHg).

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## **Challenges:**

With the increase in the volume of cooperative institutions and projects, the requirements for the carrying capacity of human resources continue to increase. At present, there are 3 full-time employees in the project team of Tongyuan Collaborative Fundraising Center, responsible for project docking, project management, project review, monitoring, evaluation, etc. There are more than 100 out of 300 non-profit organizations that are with long-term cooperation, about 20 new projects each year. The ever-increasing number of institutions has also increased the manpower demand for project management and cultivation support, especially the project cultivation needs of start-up institutions. Therefore, the CCAFC is also seeking a balance between the two through a clear form of cooperation and standardized process management and requirements. In addition, partner organizations have not yet formed a strong relationship with the center, and each raises funds for their own organizations, and the project areas and topics of cooperative institutions are also scattered.

In terms of brand influence, the Tongyuan Collaborative Fundraising Center does not form a strong brand tie with its partners, but more to support the partners' brand exposure and brand communication. The public funder usually relies on the support of capacity building or resources to strengthen the cooperative relationship between the two parties.

## **One Foundation: collaborative fundraising with a brand network.**

Founded in 2007 by Jet Li, the famous Chinese action movie star, the One Foundation is China's first non-governmental public fundraising foundation focusing on disaster relief, children's welfare, training of charity professionals, and funding grassroots charities. By the end of 2019, the One Foundation has received more than US\$354,331 million<sup>11</sup> in donations and supplies and has helped more than 17.25 million individuals in need<sup>12</sup>.

## **Operational structure:**

Following its strategic model called 'one platform + three fields', the One Foundation identifies charitable projects with clear goals and efficient services and feedback system in the three major areas of disaster relief, child care, and philanthropic support and development, and conducts public fundraising through its philanthropic internet platform.

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<sup>11</sup> 2.259 billion RMB.

<sup>12</sup> Data from One Foundation 2019 Annual Report Institutional Profile.

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Since 2011, the One Foundation has been pushing an issue-based sharing network in philanthropy. The foundation seeks to unite various stakeholders with common concerns and establish a network system. By identifying organizations' capabilities, the One Foundation introduces standardized brand projects that are feasible to partner organizations according to their operational capacities, and conducts public and policy advocacy collectively.

The most fundamental concept for the One Foundation is through a collaborative philanthropic model, and collaborative fundraising serves as a key to the network. Taking the disaster philanthropy network as an example, disaster-related organizations often find it challenging to obtain sustainably funding support due to the periodic nature of disasters. To generate collective impact, the One Foundation introduces standardized brand projects and connects organizations in the disaster field to build an issue-based network. The One Foundation seizes robust control and management power over partner organizations in project implementation, followed by a strict quality assessment system with detailed requirements. Another example is the Ocean Paradise Network<sup>13</sup> for autistic children and families, in which the One Foundation connects multiple existing networks under the common issue and conducts collaborative fundraising and advocacy across different sectors<sup>14</sup>.

#### **Core advantages:**

On the one hand, this collaborative philanthropic model has significantly improved partner organizations' fundraising capacity and project operation efficiency. The One Foundation can also negotiate with companies for larger-scale cooperation and effectively implement nationwide influence.

#### **Challenges:**

On the other hand, organizations highly depend on the One Foundation's network and brand, which is not a good strategy for long-term growth. Without their brand influence, organizations may deviate from their mission and vision and become aimless when the partnership ends. In addition, collaboration with strong management power and strict project standards sometimes raises the question of whether the One Foundation responds to local needs. It is worth thinking about how to realize the win-win solution of the brand needs of the One Foundation and its partner organizations<sup>15</sup>.

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<sup>13</sup> Introduction to One Foundation Ocean Paradise, 2021 edition.

<sup>14</sup> Can't tell? At the Foundation Forum, Public Welfare Infrastructure Is "Dissected" and scrutinized, Gu Youzuo, Narada Public Welfare Foundation, 2020-12-02, [https://mp.weixin.qq.com/s/fmAhhV\\_I-Gty74irokAVdw](https://mp.weixin.qq.com/s/fmAhhV_I-Gty74irokAVdw).

<sup>15</sup> One Foundation: Develop Issue Network, be a Pioneer in Promoting Public Welfare Ecological Construction, Kumquat Award WeChat Official Account, 2020, <https://mp.weixin.qq.com/s/ommELSaFInPuU3nrLAVyZw>.

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## **Inclusion China: collaborative fundraising with member interaction.**

The Rongairongle Family Support Center for People with Intellectual and Developmental Disabilities (Rongairongle) is a non-profit organization founded in 2014. Under the guidance of the United Nations Convention on the Rights of Persons with Disabilities, Rongairongle is committed to providing training and communication platforms for families of people with mental disorders, empowering their parents, providing integrated cultural and sports activities, and assisting them in professional careers development in an inclusive environment.

### **Operational structure:**

Inclusion China is Rongairongle's core advocacy brand to drive public and media attention, advocate policy improvement social environment changes, and better promote the equitable social participation and integration of people with mental disorders. As of 2019, the network has connected more than 200 parent communities or volunteer groups from all over the country, covering more than 100 cities and regions, and bringing together nearly 20,000 volunteers to participate<sup>16</sup>.

Inclusion China seeks to promote diversity, equality, autonomy, and inclusion to communities such as family support groups and better guide individuals with mental disorders through various supporting communities. In 2017, Inclusion China collaborated with Aiyou Foundation and started online public fundraising on Tencent 99 Charity Day by introducing three major philanthropic project products that focus on supporting individuals with mental disorders, supporting family development, and supporting industry development<sup>17</sup>. Since then, Inclusion China now has eight subprojects covering most of the needs of people with mental disorders and their families. Approximately 150 partner organizations carry out collaborative fundraising activities under the eight subprojects, which account for 70%-80% of the organization's fundraising income.

### **Core advantages:**

Being both the fundraiser and the beneficiary, members of Inclusion China Network are very close to the organization. The demand for fundraising comes within the community, and the income serves the community itself. With such natural advantages and solid reasonings, community organizations often have strong self-motivation in fundraising and mobilizing local families, volunteer groups, and companies<sup>18</sup>.

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<sup>16</sup> The United Way of Inclusion China's Network of Parent Organizations for Mental Disorders, China Donors Roundtable WeChat Official Account, 2019, <https://mp.weixin.qq.com/s/amIntMwdbK4UOIOkD-Vtdw>.

<sup>17</sup> Thirty-eight parent organizations supporting the Inclusion China project, Sohu News, 2017, [https://www.sohu.com/a/161910490\\_106862](https://www.sohu.com/a/161910490_106862).

<sup>18</sup> Content extracted from <Inclusion China: A United Way of the Mental Disability Parent Organization Network>.

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## Challenges:

However, with the expansion of the Inclusion China Network, community organizations at different stages of development face differentiated needs, calling for more resource investment. An increasing workload also requires the operation team to complete a series of requirements such as need collection, course incubation, and product development. Thus, Inclusion China Network continues to reduce large-scale operations and brand risks through standardized operating procedures, hierarchical product support, and digital management systems.

For unregistered community organizations, Inclusion China has launched the Torch Initiative Plan, which introduces detailed project products to partner organizations, and resource connections are made directly to organizations for participation. For registered network organizations, Inclusion China established the Family Resource Center to help them evolve from a volunteer team of mutual assistance to a professional organization.

It is also tricky for member organizations to expand their fundraising due to the limitation of their resources. The mobilization enthusiasm of member organizations has become weak after many Internet fundraising activities. Therefore, Inclusion China is also actively advocating on the topic of mental disorders promoting social attention and policy changes, and cultivating the donation market.

## **U Toy Blocks project: collaborative fundraising with public participation.**

The U Toy Blocks project is one of the essential philanthropic products of the Shanghai United Foundation. Evolved from the foundation's original star philanthropic product EGG WALKATHON, the U Toy Blocks project is committed to supporting non-governmental organizations in the field of children and improving their professional service capabilities, to promote healthy growth and equitable development of children aged under 18. The grantmaking covers nutrition and health, educational development, safety protection, and social integration. As of the end of 2018, the U Toy Blocks project has spent about US\$7.840 million<sup>19</sup>, funding 351 projects from 166 charitable organizations and benefiting 600,000 children in 26 provinces and cities across the country<sup>20</sup>.

Due to the popularity of the EGG WALKATHON project, in 2021, the Shanghai

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<sup>19</sup> 50 million RMB.

<sup>20</sup> 2020 Funding Report for EGG WALKATHON project, Shanghai United Foundation, April 2021.

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United Foundation renamed the U Toy Blocks project into EGG WALKATHON Funding Project, focusing more on supporting children in distress and the empowerment of children-related organizations, and facilitating donor understanding towards the entire project.

### **Operational structure:**

As a pioneer in the industry, Shanghai United Foundation has been committed to building a deep connection between public donors and non-profit organizations prior to the rise of Internet fundraising platforms. Starting from EGG WALKATHON, it has been attracting public attention to the philanthropy field and social problems and bringing organizations to the track of sincere and pragmatic service, continuous accumulation, and improvement of the ability to solve social problems.

### **Core advantages:**

From the early stage of its establishment, the U Toy Blocks Project has fully considered the funding strategies and processes that can not only allow public participation but also deeply expand the chain of trust. The project has mainly focused on coordinated fundraising projects, with its own brand projects and self-fundraising projects. It follows a three-year grantmaking circle to projects with success in the first year and a project plan for the next year. The two core value points are the in-depth connection mode between public donors and institutions, and the attention and emphasis on professionalism.

By 2019, the Shanghai United Foundation has reorganized its strategy and undergone a complete transformation<sup>21</sup>. By attracting more public donations to support collaborative fundraising, the United Foundation is committed to building a collaborative philanthropic culture and cultivating rational giving<sup>22</sup>.

### **Challenges:**

However, the Shanghai United Foundation also faces development challenges including organizational scaling – the current grantmaking design can no longer fit in all project areas for children in need. Partners can only turn to other institutions for the funds exceeding the requirements. In addition, the foundation has cultivated a group of philanthropic partners with professional problem-solving capacities, but the evaluation of their professionalism and results requires further tracking and comprehensive assessment.

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<sup>21</sup> Evaluation Report on U Toy Blocks Project by the Shanghai United Foundation, Beijing Qiyue Public Charity Center, 2019.

<sup>22</sup> Evaluation Report on U Toy Blocks Project by the Shanghai United Foundation, Beijing Qiyue Public Charity Center, 2019.

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In a word, it is necessary for the Shanghai United Foundation to expand joint actions and advocacy in the field of specific projects and professional services under the major issue of children in distress (such as education, social integration, etc.), and support field research, in order to achieve a systematic solution in the field of children in distress, and to further enhance the professional service capabilities of non-profit organizations in related fields<sup>23</sup>.

## **Happy Home: collaborative fundraising with community autonomy.**

On September 5, 2018, the Hubei Charity Federation launched the Happy Home Village Community Mutual Aid Project on Gongyibao - an Internet fundraising information platform designated by the Ministry of Civil Affairs. The project is to establish a small-amount naming fund to facilitate crowdfunding and standardized management for 27,940 villages and communities in Hubei province and provide legal and standardized Internet crowdfunding services for village communities. As of January 2020, the Happy Home Project raised more than US\$7.841 million<sup>24</sup> on the Gongyibao platform.

### **Operational structure:**

Charitable organizations jointly manage the Happy Home project under the labor division<sup>25</sup>. At the province level, the Hubei Charity Federation is responsible for the project design and operation, project rules, and project training and guidance without charges from organizations and villages. County-level charitable organizations, on the other hand, take on responsibilities including the promotion of the project, fund claim review, application statistics, verification and appropriation of funds, the supervision of the use of donations, etc.

In terms of fund management, the Hubei Charity Federation has set up a special fund to receive matching donations from the government, enterprises, and organizations. The headquarter takes all donations into their account and regularly allocate funds to various municipal charitable organizations, allowing them to pass on the funds to county-level charitable organizations. County-level charitable organizations will eventually allocate the funds to the relevant villages. Each village community will have a corresponding mutual aid fund on the platform claimed and managed by personnel from the community. With accurate information and requirements met, personnel from the villages can initiate crowdfunding projects through the platform.

### **Core advantages:**

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<sup>23</sup> Evaluation Report on U Toy Blocks Project by the Shanghai United Foundation, Beijing Qiyue Public Charity Center, 2019.

<sup>24</sup> 50 million RMB.

<sup>25</sup> Hubei Provincial Charity Federation Happy Home Village Community Mutual Aid Project Management Measures (Trial).

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The advantage of the naming fund is that the village members can independently decide the project details, including whether to initiate fundraising, how much to raise, when and how much to use the money. All crowdfunding projects are customized to the village based on actual needs<sup>26</sup>. This efficient and independent management method has become a form of collaborative social assistance across all sectors.

From September 2018 to September 2020, the Happy Home Project initiated 3564 fundraising projects and raised US\$174,043 with 19,510 registered volunteers. On September 4, 2020, the China Charity Federation officially scaled it up nationwide and signed 17 provincial and municipal charity associations to implement the Happy Home project collaboratively<sup>27</sup>.

### **CFPA: collaborative fundraising focusing on regional development.**

The China Foundation for Poverty Alleviation (CFPA) was established in 1989 and is one of the largest and most influential charity organizations in poverty alleviation and rural development in China. As of the end of 2020, the CFPA has raised a total of US\$1.229 billion<sup>28</sup> of funds and supplies, benefiting 48,418,600 people in disaster-affected areas<sup>29</sup>.

The CFPA began to carry out collaborative internet fundraising in 2014. With Tencent's 99 Charity Day further lowering the threshold for Internet fundraising, in 2018, the CFPA changed its traditional strategy of simply sharing the public fundraising license to partner organizations on Internet fundraising platforms. At present, the CFPA mainly carries out collaborative fundraising from two directions: one is to carry out joint issue-based projects partnering with professional organizations, where partner organizations conduct fundraising based on their limited network resources, and the CFPA provides support for project funds and dissemination; the other is to support and cultivate county-level charitable organizations and build a grassroots philanthropy environment. The following two projects are excellent examples of these two directions:

#### **1. Wonder School**

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<sup>26</sup> Excerpted from Quanlu Long's keynote speech at the 2019 China Fundraising Professionals Forum on interpreting the Impact of New Powers on the Fundraising Market Pattern Based on Data analysis.

<sup>27</sup> NetEase News: Hubei Village Community Mutual Aid Project Happy Home was upgraded to the national level, jointly implemented by 17 provincial and municipal charity associations, <https://www.163.com/dy/article/FNHQT96O053469LG.html>.

<sup>28</sup> 7.836 billion RMB.

<sup>29</sup> 2020 Annual Report, CFPA, 2021.

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In 2018, the CFPA launched the Wonder School Project focusing on rural education development. Through carrying out collaborative fundraising with professional charitable organizations, the project is to integrate various social resources, introduce high-quality educational resources to rural schools, and address the demand for education in rural areas. As of 2020, the project has raised a total of US\$2.57 million<sup>30</sup> in donations from online fundraising and corporate giving<sup>31</sup>.

### **Operational structure:**

Since July 2019, the Wonder School has transformed from the ‘joint issue’ model to the ‘joint issue and region’ model. Based on existing resources, organizations can carry out joint projects in the county by independently cooperating with other partner organizations from the Wonder School project, and the CFPA also provides fundraising and resource support to the project. By introducing external forces, organizations under the common education issue begin to cooperate with each other to address the problems in a systematic way, and local organizations learn to realize the operation of county-based philanthropy effectively.

In terms of brand strategy, the CFPA seeks to maintain the balance between the foundation’s brand and partner organizations’ brands. On the one hand, the CFPA carries out fundraising using the unified Wonder School brand to strengthen the project's credibility. The collaboration with organizations has enriched project products and increased influence. On the other hand, organizations that joined the Wonder School project can retain their own project brands for extra promotion and mobilization. Cooperation with the CFPA also enhances their brand credibility and influence<sup>32</sup>.

## 2. Flowing Water

The Flowing Water Project aims to cultivate professional and standardized county-level organizations and talent teams for the western region, help build a philanthropic environment, and realize the long-term development for the west region.

Instead of cultivating a hub organization, the CFPA directly supports county-level organizations. Firstly, it selects municipal governments as the main body for application and then supports or incubates local organizations. In this way, the project ensures that the local governments support public welfare and rural

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<sup>30</sup> 16.399 million RMB

<sup>31</sup> Here, the total amount of funds raised by the beautiful school is calculated from the summary report of the Happy Home for the three years from 2018 to 2020. As of April 23, 2021, the ‘Happy Home Helping Rural Children with Good Educations’ has raised a total of 18.6438 million yuan and spent 15.4097 million yuan.

<sup>32</sup> China Foundation for Poverty Alleviation Tencent 99 Public Welfare Day Joint Fundraising Model Exploration Summary and Optimization Suggestion Report, CFPA and FIDC, January 2019.

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development, cooperate with project implementation, and actively carry out resource mobilization in the later fundraising period. Secondly, the CFPA provides three-year support with phased goals, including financial capacity, organizational development, brand influence, fundraising goals, etc.

### **Operational structure:**

The Flowing Water project mainly supports the counties in four aspects<sup>33</sup>:

- Provide funding for project and development in a three-year roll;
- Provide professional brand design and promotion with various media and channels,
- Conduct organizational training and project assistance;
- Conduct collaborative fundraising with internet philanthropic platforms.

### **Core Advantages:**

Whether by introducing external charity resources like the Wonder School project or by tapping local resources like the Flowing Water project, the CFPA relies on the foundation's long-term strategy, the trust from governments, and the cooperation from all social resources, and continue to improve the development of local philanthropy.

## **Analysis of the development of China's collaborative fundraising**

### **Analysis of the macro environment and development trend.**

In September 2020, the China Association of Social Security released the Evaluation Report on the Charity Law of the People's Republic of China, which pointed out that in the four years since the implementation of the Charity Law, charitable organizations and activities began to standardize, and the mobilization capacity of charitable resources was enhanced. However, the mobilization capacity of charitable resources is still limited, and the social resources hidden in the private sector have not been effectively explored. The third distribution, with philanthropy as the main manifestation, is almost negligible in our national income distribution system and individual wealth sharing. At the same time, misconduct in the philanthropy field has occurred from time to time. Some charitable organizations do not disclose enough information and are not highly transparent; multiple fundraising, fraudulent fundraising is not uncommon.

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<sup>33</sup> The Flowing Water Program 2020 Annual Report, CFPA, Jan 2021.

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The 2019 China Charitable Donation Report shows that for the whole year of 2019, China received a total of 170.144 billion yuan of domestic and foreign donations. Among them, the mainland received a total of 150.944 billion yuan in monetary and goods donations, with 107.81 yuan per capita. However, the total social donation in mainland China has never exceeded 0.2% of GDP over the years, showing that China's public charity development is still at the primary stage.

In the past five years, the rise of China's Internet fundraising platforms has become a calling card for China's public charity to the world. However, until 2019, the total amount of public donations from the 20 Internet fundraising platforms designated by the Ministry of Civil Affairs still only accounted for less than 4% of the total social donations on the mainland. On the contrary, the commercial individual platform for help is growing rapidly on the scale.

The huge traffic and powerful technical capabilities brought by the internet platform have amplified the industry's long-standing weaknesses and fundraising achievements and reinforced society's inherent perceptions of traditional charity and donation behavior, leading to the prevalence of case-based fundraising and individual help-seeking platforms. Meanwhile, not yet formed the cornerstone of ethical values, China's charity industry shows an obsession with project scaling and donation amount.

The collaborative fundraising model needs to serve the social governance and community development, rather than the volume and scale of the organization or the Internet platform itself. Only by clarifying this starting point can the Chinese collaborative fundraising model break out of the traditional charity rut, move towards a truly modern charity, and take its place in the new era by bringing the value of charitable power into play.

## **Summary of the advantages and disadvantages of collaborative fundraising.**

In Chapter 3, we listed six types of existing collaborative fundraising in China. At the operational level, most of them face a high degree of homogeneity: none of the collaborative fundraising institutions or platforms have their own funding reserves, which is essential in supporting organizational operation and development. The capacity building and nurturing support for collaborative fundraising also require a large amount of labor and time, especially for start-up organizations. The value of collaborative fundraising should focus on the partnership between the parties and the ability to leverage each party's strengths to form a synergy.

This report analyzes and sorts out various types of cases and objectively summarizes

the advantages and disadvantages of different types of joint fundraising modes, as shown in the following table:

<b>Types</b>	<b>Advantages</b>	<b>Disadvantages</b>
Sharing Public Fundraising License	For public fundraising organizations: conducive to rapid scale and fund expansion; For non-public organizations: obtain the license at low cost.	Low threshold and susceptibility to public opinion; An overlook towards project effectiveness; Low stickiness and high substitutability between the two partners.
Brand Networking	For public fundraising organizations: facilitate the scaling up of brand projects and enhance its brand value and industry position; reduce its management costs. For non-profit organizations: increase fundraising capacity.	Brand dependence/project dependence; Strong brand tension between both sides; Risks towards frontline implementations.
Mutual Support Community	High social network stickiness; Community network members being both fundraisers and beneficiaries with strong self-mobilization.	Difficult in professional development; Difficult to network expansion due to limited community resources.
Joint Issue	Promote specialization and resource development in different subject areas; Improve the funding effectiveness.	Joint advocacy and research on issues requires special funding from both sides.
Community Autonomy	Mobilize local resources to address local needs; An operational mechanism for communities to identify and address local needs.	Need support from government side; Rely on community leaders to act.
Regional Ecology	Support local social organizations to mobilize local resources to address local needs; Cultivate county-level forces and enrich the ecology of the domestic philanthropy industry.	Cultivation requires a lot of human, financial and material investment with a long-term cycle; County differentiation requires customized cultivation strategies.

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## **Analysis of the model impact on frontline organizations.**

In order to analyze the impact of collaborative fundraising on frontline organizations and optimize the mode, the FIDC has partnered with a number of pivotal institutions and carried out a questionnaire survey on the participation of collaborative fundraising. A total of 268 questionnaires were returned in this survey. The scope of research institutions covers 9 provinces, including 45 cities/states and 142 districts/counties/prefecture-level cities<sup>34</sup>. The scope of services covers diverse fields such as education assistance, assistance to vulnerable groups, disaster relief, environmental protection, animal protection, etc.

Due to limited space, this report does not cite the full text of the survey and analysis<sup>35</sup>. Here presents the following four issue analysis: the influence of collaborative fundraising on frontline organizations; problems encountered by frontline organizations in the joint fundraising process; relationships between frontline organizations and collaborative fundraising stakeholders; and the current attitudes and views of frontline organizations towards collaborative fundraising.

### **The Impact of Collaborative Fundraising on Frontline Organizations.**

The report analyzes the importance and influence degree of collaborative fundraising for frontline organizations through the interactive analysis of the average annual income and the proportion of income brought by collaborative fundraising. The result shows that for most organizations, collaborative fundraising accounts for no more than 30% of total revenue. However, about 10% of organizations still earn more than 70% of their revenue from collaborative fundraising as their main source of income. Secondly, collaborative fundraising has a more significant impact on small and medium-sized organizations regardless of the proportion of revenue. On the other hand, for most large first-tier organizations (with average annual revenue of more than \$5 million RMB), the revenue impact of collaborative fundraising is relatively low.

### **Problems Encountered by Frontline Organizations in Collaborative Fundraising.**

The survey also analyzes frontline organizations' views on collaborative fundraising as a whole and their specific difficulties in the fundraising process through the problem analysis and assessment of the status quo<sup>36</sup>. First of all, about 20% of the organizations think that the current collaborative fundraising model aligns with the development of the organization, about 65% of the organizations recognize the

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<sup>34</sup> At present, the distribution of provinces in the sample is mainly concentrated in Shandong, Gansu, and Guizhou.

<sup>35</sup> For more detailed analysis, see "Joint Fundraising Engagement Report for Frontline Implementation Agencies", The Fundraising Innovation Center, January 2022

<sup>36</sup> Original questionnaire questions:

Is there a problem with your organization's participation in joint fundraising?  
Does the existing joint funding model meet corporate development needs?

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current status but look forward to its future development, and about 15% of the frontline organizations hold a negative attitude.

As for the specific problems in the process of collaborative fundraising, frontline organizations with different views have various dilemmas.

- 1) For organizations that believe that the existing collaborative fundraising model meets the needs of organizational development, the core dilemma lies in the brand independence and a high degree of reliance on the reputation and qualifications of public fundraising parties;
- 2) For organizations expecting diversified cooperation, the existing cooperation rules are changeable, which increases the uncertainty of organizational fundraising work. The second is the funding dependence on collaborative fundraising. The third difficulty is the limitation of the project, such as human resources in the existing cooperation projects with no time to develop or update their own projects.
- 3) For institutions that think collaborative fundraising hinders their own development, the difficulties are also the direct impact of the changing rules of the existing cooperation mode on fundraising work and the restrictions and manpower consumption of projects.

### **Relationships Between Frontline Organizations and Collaborative Fundraising Stakeholders.**

The survey analyzes the overall relationship between frontline institutions and all relevant parties in the process of collaborative fundraising through the analysis of the organization's relationship with public fundraising parties and hub institutions<sup>37</sup>. Most organizations define their relationships with stakeholders as working partners for the common good and mutual benefit. However, it is worth noting that there are also some institutions considering their relationship simply a service purchase relationship somehow.

### **Attitudes of Frontline Organizations Towards Collaborative Fundraising.**

The survey analyzes the attitude of frontline organizations towards the collaborative fundraising model through their feedback evaluation<sup>38</sup>. From the results of the overall

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<sup>37</sup> Original questionnaire questions:

What do you think the relationship between your institution and the pivotal institution basically belongs to?

What do you think the relationship between your institution and the public offering side basically belongs to?

<sup>38</sup> Original questionnaire questions:

Please use three words to describe how you feel about being involved in this type of joint fundraising for charity.

Do you think these three words are positive, negative or neutral?

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research, most of the frontline organizations involved in collaborative fundraising are small and medium-sized organizations established 1-5 years ago, with a capital size below \$1 million RMB.

Most organizations gave a positive evaluation towards collaborative fundraising and expected more forms of collaboration. In terms of challenges, organizations emphasized the influence on daily fundraising due to brand dependence, capital dependence, project constraints, and the changing rules of the platform/foundation. It is difficult to break through and expand the existing model of action. Frontline organizations joined the collaborative fundraising network to receive diversified support from public fundraisers and hubs, mostly in the form of capacity building and support to carry out specific fundraising work. In the survey, frontline institutions emphasize the long-term value of financial support for their organizational development.

## **Recommendations for future development.**

### **Feasible Strategy: Local assistance and Issue Union.**

Through the analysis of the Chinese and foreign cases, collaborative fundraising can be roughly divided into two categories: one is dedicated to the development of a particular geographical area where collaborative fundraising institutions and individuals address various social issues within the county domain. The other one focuses on a particular field of philanthropy where collaborative fundraising is formed between organizations or individuals in the field.

Specifically, United Way is a typical fundraising organization for county development. Share Literacy and PTA, on the other hand, both have a focused issue. In any way, the essence is always to solve local social problems. Collaboration exists when multiple organizations share a common goal or complementary interests, with some kind of proximity conditions, whether geographically or cognitively. Either type of collaborative fundraising organization should attract donors to support philanthropic issues in their area because donors tend to be more interested in the area where they live and want social problems there to be solved. Collaborative fundraising organizations should be locally rooted and focus on helping the local community.

### **Value Orientation: From Pursuing Fundraising Amount to Problem Solving and Social Innovation.**

It is also important for organizations or individuals involved to be clear about the goals and values of participation during collaborative fundraising. One has to meet various criteria and principles during participation rather than abandoning them in exchange for increasing the fundraising amount. In China, the majority of

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collaborative fundraising practices are still limited to increasing the amount of money. As a matter of fact, collaborative fundraising is to help small and medium-sized nonprofit organizations survive and expand their overall social impact. Therefore, public and Internet fundraising information platforms should shift from pursuing fundraising to solving social problems and guiding social innovation as their ultimate goal. In this way, organizations at all levels can achieve win-win cooperation with complementary advantages and bring the value of joint fundraising into play.

### **Mapping for Positive Cooperation: From License Sharing to Cooperation Alliance.**

From the perspective of international cases, collaborative fundraising is generally made up of two or more groups that raise more money than anyone alone. Also, collaborative fundraising institutions should share similar values and have enough trust to work together.

However, there is a broader understanding of the definition of collaborative fundraising in China. Collaboration relates to the sharing of fundraising licenses between public foundations and non-profit organizations, and to the cooperative alliance of parties with the same fundraiser-beneficiary identity.

The key to the development of joint fundraising in China lies in whether the platform organizations dare to change their focus and determination from the project itself to platform fundraising and donor services. In addition to the technical output of the project, organizations need to support more partners in achieving common goals within a region or issue and figure out how to scale up the fundraising and donor services. Finally, it is recommended for organizations with a scale-up goal to embrace the digital wave and establish a database system, including payment services, financial data management, funding management, and donor relationship maintenance.

In a word, our advice to collaborative fundraising organizations is to gather various partners by setting common philanthropic goals, provide professional output, strengthen fundraising capacity at scale, take full advantage of the Internet and technology tools to build a true fundraising network impact in response to regional or issue-based goals.

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