

Disaster Appeal Toolkit

Supporting your community following a disaster

**Transatlantic Community Foundation
Network Peer exchange March 2007**

Contents

	Page
Introduction	3
Glossary of terms	4
Planning for a disaster	5
Why launch an appeal	6
Decision making	9
Fund raising	
Grant making	
Media	
Life after the appeal	
Appendix	
List of TCFN Peer Exchange conference delegates	
List of material available on TCFN website	

Introduction

Throughout the world Community Foundations take central roles in their local communities. They are increasingly recognised as community leaders with a breadth of knowledge about community issues and need. It follows that at times of crises within their local communities Community Foundations should play a role to provide support in particular financial support to help their community through the difficulties that arise as a result of a 'disaster'.

This 'Tool Kit' has been created to provide Community Foundations with a guide to plan set up and effectively manage a disaster response fund in their local communities. It is constructed as a series of tables, considered the easiest way to manage a large amount of information in a way that provides clarity and ease of reading when time may well be at a premium.

The 'Tool Kit' has been designed and written using information developed following a two day conference run by the Transatlantic Community Foundation Network in March 2007. The conference brought together directors and staff from a range of Community Foundations (see appendix 1 for full list of attendees) some of whom have had first hand experience of running disaster appeals. *The list of delegates has been annotated to provide you with details of each organization's relevant experience and includes those who have developed a disaster plan for their organization but as yet not had to put it into action.*

The 'Tool Kit' has been developed with two purposes in mind. Its primary purpose is as a source of direct support and information to Community Foundations who find themselves having to respond to a local disaster. Its secondary purpose is to provide a guide to those Foundations who wish to plan and prepare their organization to be 'disaster fit' by developing an organization specific disaster response kit.

We hope that this 'Tool Kit' is easy to use and provides a range of basic material that can easily be translated into local practice in whatever country you operate and whatever the nature of the disaster you are responding to. This basic document is backed up by a range of more detailed information (see appendix 2) which can be found on the Transatlantic Community Foundation Network website (www.XXXXXXXXXXXXXX).

Please note that whilst the delegate group at the conference often returned to the debate 'what is a disaster' it was felt that this particular discussion would not be useful to describe within the framework of this document. However it was recognised that this is an important debate and one that might be usefully held within your own Foundation in preparation for your organisation's response to a local 'disaster'.

Glossary of terms

This document has been written with an 'international' audience in mind. However, there are a number of words or phrases that have been used that are not 'international'. For ease we have chosen to use the English term or phrase on each occasion. However, for reasons of clarity, and in recognition that this document is a reference tool for staff and Trustees in a number of different countries we have set out below these words or phrases and a brief description of their sense.

Disaster - this word has been used in its broadest sense. In an effort to provide one word to describe a range of different natural or man made occurrences that could be described as a disaster dependent on the impact within a given community. As previously explained this document does not set out to define or describe 'disaster' it is left to the reader to decide what a disaster is and when one has occurred through local knowledge and reading of their communities response to a given situation.

Trustee - has been used to describe any unpaid individual who sits on a board or committee that has responsibility for the management of a Community Foundation or other charitable body.

Charity Commission - in this document we have used the name given to the legal body that has responsibility for overseeing charitable bodies and charity law in England and Wales. Please substitute the appropriate organization for your country.

County Council/District Council/health authority - in this document we have used these three terms when describing local authorities who have responsibility for a range of emergency services and other support services during a disaster. Please substitute the appropriate organisations for your country.

Gift aid - < >

Media - in this document the general term media has been used to describe a range of agencies providing news and information to the general public. These agencies include radio, television, newspapers, magazines and news/views websites.

Planning for a disaster

Disasters by their nature hit communities with speed, this means that Community Foundations need to be in a position to be able to respond quickly and effectively if they want to support their community at a time of crisis.

One of the recommendations of conference delegates was that Foundations should spend time reviewing their organisational policies and procedures and develop a range of measures to ensure that they know that their organization is fit to handle the challenge of a disaster response.

Some of the work you will need to undertake to prepare your organization could be time consuming with widespread implications for the organisation, for instance making changes to governing documents or developing policies to support quick decisions outside due process. We would therefore suggest that your organization identifies a team of staff, volunteers and Trustees to make your organization 'disaster fit' and to consider developing a disaster planning document that details your action plan to guide staff through the early days of a disaster response.

To support the preparation and the development of such a document we have identified topics that your 'disaster team' might need to consider. At the end of each chapter of the Tool Kit you will find a section entitled Pre-planning Subjects which lists these topics. These have all been brought together in a separate 'Planning Kit' in appendix 3.

Why launch an appeal?

Below are a series of factors to consider before making a decision to run or support a disaster appeal. Many of these are very subjective issues. Decisions will have to be made very quickly often with limited knowledge and based on 'gut feeling' it would therefore be worth considering debating a number of the issues amongst staff and Trustees prior to a 'disaster' occurring.

Reasons to run an appeal		
Reason	For	Against
Raises the profile of the Foundation	An appeal can provide Foundation with considerable access to the local media this can be significant for a small or new Foundation that has little or no local profile.	Be aware that the media are happy to take up negative as well as positive stories from the appeal.
Increases the range and number of donors aware of the Foundation	Can provide a range of new contacts to potential future donors.	In reality very few appeal donors become long term supporters of Foundations.
Potential damage to the reputation/credibility of the Foundation if don't respond		A poor reason to set up an appeal It is important to realise your organization's limitations you could damage your organisations track record irreparably by operating a badly run appeal.
Opportunity to build the knowledge, and credibility of the organization and demonstrate ability	There is no doubt that staff and Trustees can gain a huge amount of knowledge and experience from running an appeal. A successful appeal can increase the credibility of a Foundation.	
The appeal responds to a real need in the community	Foundation is seen as having a good local knowledge and understanding of need. Alternative wording Community Foundation's claim to respond to the needs of their communities. A disaster is an obvious example of need.	Ensure that you are responding to a disaster rather than an ongoing need as there is a danger that you suggest that a quick fix is a suitable response to a long term problem.

<p>The appeal is at the heart of what the Foundation works to address</p> <p>I don't understand this</p>	<p>This is the key to a successful appeal. Staff and Trustees are fully informed and XXXXXX Foundation is seen as having a good local knowledge and understanding of need.</p>	
---	--	--

Reasons not to run an appeal		
Reason	For	Against
<p>Another organization has already responded</p>	<p>They may have taken away the need for you to make a difficult decision.</p>	<p>You may need to check your organization's decision making processes have you missed out on an opportunity simply because you did not respond quickly enough.</p>
<p>Another organization is better equipped</p>	<p>Recognizing another organization's ability and or particular expertise to manage an appeal more effectively and offering to support them may have very positive benefits for your organization, ensure you maximise the media potential of your involvement.</p>	<p>Check out your organization's skill and knowledge base have you missed an opportunity that if you had set up a disaster plan you could have responded to.</p>
<p>Not able to make a meaningful impact on the issue</p>	<p>You are best not to launch an appeal if you feel that you will not successfully raise enough funds to make a tangible impact on those people who have suffered the most.</p>	<p>Don't forget to factor in that many people who benefit from a disaster appeal find the emotional support as important if not more so than the financial. Discuss with other organisations and the media the support they can offer to raise the profile of an appeal thus increasing the potential to raise funds.</p>
<p>You are fully committed to running another appeal</p>	<p>Running two appeals concurrently will confuse the general public and you run the risk of sympathy overload.</p>	<p>Do the appeals compliment one another? Is there the potential that running two appeals concurrently could boost overall support?</p>
<p>The general public may not respond sympathetically</p>	<p>It is tough to raise funds if a disaster does not capture the sympathy of the general</p>	<p>Some disasters may hit a very specific geographic area or group of people</p>

	public.	who do not have mass appeal or capture the general public's sympathy. This may not be a reason not to provide support. The weight of your organisation's support may raise public awareness and sympathy.
You will be unable to fulfil the requirements of other funders	If you are unable to service your existing funders this may have a negative effect on the long term viability of your organisation.	Discuss the disaster appeal with the funders. It may be that they are happy to relax certain reporting requirements for the duration of the appeal.
Your organization is focused on endowment fund raising	Endowment raising is a long term process.	Running an appeal may raise the profile of the Foundation and therefore support long term endowment raising.
Don't have staff or financial resources	Poorly trained temporary staff who provide a poor service could damage your organisation's reputation.	It is generally accepted that a % of appeal funds can be spent on administration. Factor this into discussions. Many staff and volunteers will be motivated to work long hours over a short period of time to support an appeal.

Learning points

Whilst a disaster appeal will raise the profile of the organization it is very difficult to measure this and to quantify how this is translated into positive action such as an increase in the number of Foundation supporters or a wider recognition of the name of the Foundation in the local community.

Do not assume that there is a natural progression from a donor to a disaster appeal to a long-term donor to the Foundation. Research and experience has shown that very few donors to disaster appeals translate their giving into long term support.

It is vital for the success of the appeal that the Foundation has a strong emotional link to the appeal as well as sound financial and needs led supporting evidence.

A disaster can often be a real opportunity for a community as it galvanises action and supports the development of new organisations and relationships

It is very important that the Foundation has ownership of the appeal and overall responsibility for the management of the funds raised.

Pre-planning subjects	
<i>Topic</i>	<i>Outcome</i>
Open discussion with Trustees about	Establish whether Foundation would

general principle of running a disaster appeal	consider running an appeal and what planning needs to be undertaken to ensure the Foundation is prepared
--	--

Documents available on TCFN website:
Sample disaster plans

Decision making

Disasters by their nature hit communities with speed, this means that Community Foundations need responsive and timely decision making processes.

It is also worth noting that Community Foundations are likely to have a very high profile during an appeal. All decision making, in particular grant making, will need to be beyond reproach and fully backed by good quality processes and paperwork.

What decisions		
<i>Decision</i>	<i>Who makes it</i>	<i>Comments</i>
To run or not to run an appeal	Trustees - in practice this maybe through phone calls and a majority vote amongst Trustees contacted. Some Foundation's have passed resolutions which enable the Chair of Trustees plus the CEO to take the decision. It is important that this decision is later ratified at a full Trustee meeting.	Check that your governing document allows for this type of process As things will move fast and Trustees may only meet every 4 months it is important that Trustees are kept fully informed about the appeal. Consider sending out regular updates or circulating Trustees with all media releases.
Day to day decision making	Director supported by senior staff.	Daily staff meetings are essential to keep all staff members up to speed. At the height of the disaster you may need to meet 2 times a day
Fund raising	It is worth considering setting up a committee or work group to oversee fundraising. This group should include Trustees and other key community figure heads including significant partner funders and senior local authority figures	This will give major donors and key partners an opportunity to be involved in the appeal and to share recognition.
Grant making	Best practice would be to establish an appeal grant making committee - this may not however, be appropriate if you know that you will be giving out a limited number of grants and you can use existing structures.	The committee should be chaired by an experienced Trustee with name recognition and grant making experience. Do ensure that the Trustee is able to commit considerable time over an extended period. Other committee members

		need to reflect the local community, dependent on the nature of the disaster and/or community you may consider it more important to involve a number of individuals who are trusted by the community and have high name recognition rather than creating a committee purely on the basis of grant making expertise.
Delegated grant making	Delegation of decision making to a grants officer and or appeal chair for sums below a pre agreed level is desirable, especially if the workload is onerous and responses need to be quick.	It is important that delegated powers are limited and that there is a robust process in place to protect delegated grant makers this should also include a process whereby delegated grant makers can bring difficult or unusual cases to the full grant making committee for final approval

Learning points
This is an area that lends itself to prior discussion. Making alterations to a governing document can be a slow process.
Build grant making and/or fund raising/development committees around the skills and knowledge needed for a given disaster and the type of fund you are hoping to create.

Pre-planing topics	
Topic	Outcome
Do your organization's objects enable you to run a disaster appeal?	Make suitable alterations to governing document if appropriate.
Do your organization's objects enable you to support individuals?	Make suitable alterations to governing document if appropriate or identify potential organisations through which you can route awards.
Does your organization's governing document give you permission and provide details on how to make decisions outside usual due process?	Make suitable alterations to governing document if appropriate.
Do you have in place policies for delegated grant making?	Develop suitable policies.

Consider identifying and training Trustees who could take on a significant role in the event of a disaster appeal.	The creation of a team of trained/knowledgeable Trustees who have the skills and authority to take action immediately.
--	--

Documents available on TCFN website:

Sample organization objects

Sample delegated grant making policy

Fundraising

This section has been divided into two key elements; developing an appeal document and raising funds.

At the heart of any disaster appeal is the appeal document. This document provides a lucid quality case for the appeal; it describes clearly what issues the fund will be addressing and how money raised will be spent. A good appeal document is a fundraising tool but should also aim to provide clear simple guidance regarding the governance of the appeal and its grant making.

Developing the appeal document		
Topic		Comments
Appeal target	Set a clear target that you feel is a realistic sum to raise but will also provide adequate funds to make a real impact on the needs you have identified Do not be afraid to revise your appeal if you gather further information both internal and external that suggest that your early estimates were incorrect	Although it is often difficult to get accurate statistics in the early days of a disaster it is important that you are able to back up how you have made your decision regarding the appeal target
Object of the fund	This statement is crucial. You must clearly set out what the appeal has been set up to do. You should consider wording the funds object to include the recovery and rebuilding phases that occur following a disaster	It may be appropriate to use legal wording and/or statements from the Charity Commission to ensure clarity particularly if you are considering supporting individuals.
Description of need	It is important to provide a clear description of need, it does not need to be detailed but must include information about the places, and people most affected by the disaster. You will also need to provide a clear description of the types of needs they will have and how the appeal fund will support them. In addition you will need to be clear about the	

	organisations you will be supporting and the services you will be expecting them to provide	
Hallmarks of the fund	A simple statement that sets out how you will manage the fund	This may include statements about the speed and simplicity of your grant making, the % of the fund to be spent on administration and reference to complaints procedure
Who you will be approaching for support	Detail any funders that have contributed to set the fund up and clearly indicate the amount the Foundation will be contributing to the fund. Detail the types of funders you expect to approach, local businesses, local government, general public and charitable trusts.	The amount of money the Foundation provides will often set a bench mark for the amount of money others donate
Notes about restricted funds	You need to set out clearly if you are prepared to run restricted funds within the appeal and if so how	Restricted funds may include age group, (children or older adults), geographic or organization of individual restrictions Ensure that your finance department keeps accurate records of all restrictions specified by donors
Donor services	Be clear about any specific services you may want to offer donors	This may include a place on grant making or fund development committees for significant donors, a media release or note on your website
Grant making	Provide clear, simple description of how you will manage grant making include application forms and grant criteria in the documents appendix	Later versions of the document should include updated information about grant making and any changes to criteria
Monies remaining at the close of the appeal	Ensure that the document contains information how any monies remaining at the end of the appeal will be used	A general note to indicate that this decision will be made by Foundation Trustee and that money will be spent on charitable projects relating to or in the

		area of the disaster should suffice
Endorsement	If you receive funding from an individual with high name recognition e.g. celebrity, member of royal family or high profile local dignitary request their support to write an endorsement for the fund	
Updating	This is your key fundraising tool keep it up to date providing key statistics, updating information about need and revising appeal targets and totals	

Raising funds		
		Comments
Key donors	Identify and approach key donors as soon as possible	Discuss with key donors their expectations regarding recognition of their donation and any reporting mechanisms
Gift aid	Ensure that donors wherever possible are provided with a gift aid form this can greatly increase the final value of your fund	
External collection points	Identify a local bank or building society into which people can pay donations	This may be something that you can discuss with your own bank in planning/preparation stages
Media	It is important to get a high media profile for the appeal SEE MEDIA SECTION	
Members	Ensure that all members of the Foundation receive full information about the appeal and are kept up to date with the appeal's progress	Members can be key ambassadors for the appeal consider sending them extra information so that they can share it with friends and work colleagues
Saying thank you	Always, always say thank you a brief letter or even email will suffice	Keep a record of all donors who have requested reports or information about how their money was spent and ensure you

		respond
Public bodies	Ensure key public bodies such as county and district councils are approached as soon as possible. Their support can be seen by many as key regarding the credibility of an appeal. It may be possible to work with local or national bodies to develop £ for £ match funding schemes	Public bodies may have due process to follow and it may be weeks before funds can be released but it is fine to promote a pledged donation
General public fund raising events	Put together a basic fact sheet for local groups and members of the general public who want to run fund raising events Attend either the event or a cheque presentation wherever possible these are ideal media opportunities	This is a grey area as it is difficult to police just who is raising what money in your name and how much of it makes its way to the fund but to refuse support to groups wishing to raise funds would be churlish
Charitable Trusts	Create tailored approaches to charitable trusts	This can be very labour intensive and can often take many months to deliver any gains it is best to apply for funding to support elements of the identified need that you know will continue to be an issue for 6 months or more Trustees are often the key to accessing charitable trusts through personal contacts do not be afraid to ask them to make introductions.

Learning points

The appeal document must include a description of how any money left unspent when the fund is closed, is to be allocated otherwise there is a danger that you are left with money that it is virtually impossible to allocate. You may wish to consider a general disaster pot into which this money is put to support any future disaster appeals.

Pre-planning topics	
<i>Topic</i>	<i>Outcome</i>
External collection points	A bank or building society that has offered to undertake this role at the time of a disaster.
Fund raising guide - you may be able to amend a similar document that you have already prepared for general Foundation fund raising	A document ready to go when needed

Documents available on TCFN website:

- Sample appeal document
- Sample fund raising guide
- Sample gift aid wording

Grant making

The single most important element of the fund as it is the most visible part of the appeal process. Be aware that grant making can also very easily be misunderstood. You do need to be very clear about your criteria and processes, and to be prepared to defend your grant making.

General		
Phone lines	<p>Set up a dedicated phone line to take calls about the appeal</p> <p>Develop a fact sheet for all phone operators include a list of phone numbers for other support agencies</p> <p>Prepare and support phone operators they may have to deal with very distressed and/or frustrated and angry individuals always ensure that there is a senior member of staff they can refer callers to in the event of difficulties</p>	<p>It is important that phone operators give out consistent information</p> <p>People calling will be traumatised they may often say things that are distressing to phone operators. Operators need to understand this and not to take abuse and/or anger to heart</p>
Being seen	<p>In the early days of the appeal get out in the community affected by the disaster. Gather first hand information and experiences, talk to other support agencies deliver appeal and grant information</p>	<p>Make sure that you don't hamper emergency services or other support agencies.</p>
Criteria		
Grant making criteria	<p>Keep criteria brief and ensure they are written in plain language</p> <p>In initial stages it is better to keep criteria narrow. Do not be afraid to alter or broaden criteria as your knowledge of need develops</p> <p>Make sure copies of the criteria and application form are as accessible as possible and that paper and electronic versions are both available</p>	<p>You may need to consider a policy regarding repeat applications</p>

	<p>Prepare a list of key people and agencies and send paper and electronic copies to them make sure they are all sent updated copies</p> <p>If you do make alterations to your criteria it is good practice to contact all applicants previously rejected to give them the opportunity to reapply</p>	
Monitoring	<p>Volume of individual applicants may mean this is impractical however it is important to provide regular statistical updates regarding grants</p> <p>Grants to groups should follow Foundations usual monitoring policy</p>	<p>If the disaster you are dealing with has meant people have been displaced in reality it may be very difficult to maintain any contact with a large number of grant recipients</p>
Application forms		
Forms	<p>Keep forms brief, do not ask for information you are unlikely to use or follow up. Keep request for personal or financial information to a minimum.</p> <p>Ensure you include information about data protection and state that you will not be sharing information with other agencies unless given permission.</p> <p>Ensure you include a fraud statement that gives you the opportunity to reclaim monies fraudulently requested</p>	<p>Don't forget that due to the nature of the disaster some people may not have access to basic personal information or forms of identity you may need to be inventive regarding how to check people's details</p> <p>Remember this is an emergency it is important to get money out as fast as possible risk is inherent with this type of grant making you need to balance this with the need for proberty</p>
Volume	<p>You will need to be prepared to deal with a huge increase in volume of work, good IT systems can make all the difference</p>	<p>Prepare staff, clear workloads</p> <p>Keep a very close eye on staff stress and be mindful of burn out</p> <p>Be aware of staff family commitments</p>

Learning Points
There may be times when you are supporting projects or individuals that the general

public are not sympathetic to.
It is better to stretch experienced grant making staff than to try and train new staff but do consider temporary or volunteer administration staff
Consider seconding experienced grant making staff from other Foundations
Data protection is a key issue you need to provide clear and visible information about your policies and practice
If your Foundation does not have experience of or the legal powers to give to individuals consider providing a block grant to a third party who can

Pre-planning topics	
Topic	Outcome
Giving to individuals - you will need to establish if this is something your organization wants to undertake and if so if your governing document allows you to	

Documents available on TCFN website:

- Sample criteria for group applications
- Sample criteria for individual applications
- Sample application forms for group applications
- Sample application forms for individual applications

Public relations and media

Having the media on your side during a disaster appeal can make a huge impact on the success of your fund raising. The media can help to maintain the momentum of fund raising by reporting significant donations to the fund, case studies of individuals and groups the fund has grant aided, and stories about continuing need in communities affected by the disaster. However, the bottom line for the media will always be what is a good story and what sells. So whilst one day they may be your best friend they may write a negative story about the appeal the very next, maintaining a good relationship with senior media staff is vital to ensuring you always get an opportunity to tell your story.

Producing information for the media	
Subject	Comments
<p>Staff - you will need to identify 2 key members of staff</p> <p>Media contact - a senior member of staff identified in all press releases as the main contact they will need to be familiar with the day to day operations of the appeal and able to make statements on behalf of the Foundation. This person will also need to be available outside office hours and to undertake interviews or provide quotes or information at short notice.</p> <p>Press release author - A member of staff preferably with previous experience. You will need to ensure this staff member has time to create a daily press release for the first two weeks</p>	<p>This is a great opportunity for a member of staff to develop new or enhance existing skills</p>
<p>PR company -</p> <p>As an alternative to the above do consider employing a PR company to undertake all media relations</p>	<p>This may be a good option if you already have an established relationship with a company. It would be difficult to brief a company not familiar with Community Foundations at the time of a crisis</p>
<p>Getting the press on side</p> <p>Talk to the media before you launch your appeal it is worth giving a local radio/TV station or newspaper an exclusive re the launch of the fund</p> <p>Send daily press releases in the first weeks of the appeal</p>	<p>Local media will soon learn to trust the quality of your press releases and you will often find your information reproduced verbatim</p>
<p>Developing and maintaining contact -</p> <p>Make sure your contacts are up to date and relevant. Send all press releases electronically and follow up with phone calls if your message is particularly important</p>	<p>It is worth considering setting up a good media contact sheet in advance</p>

<p>Writing a good story - Human interest stories always go down well. Media respond to both fundraising and grant making stories and favour stories that include children and young people raising funds, grant making to groups supporting older adults and people with disabilities etc You may also consider developing stories around a good quality image you have or can generate e.g. a parachute jump</p>	<p>If you use case studies that directly name an individual or family always ensure you have their full permission. If you are using a 'fictionalised' case study do ensure that it</p>
<p>Identifying and using milestones - This is a good way to generate new stories for the media and might include 1st £100,000 raised 1st grant given out Reaching appeal target 6 months after the disaster closing the appeal</p>	

Responding to the media	
Subject	Comments
<p>Case studies - Media agencies will often ask you to provide details of groups and/or families you have supported Never give out details unless you have personally asked an individual and received their consent</p>	<p>Some people will identify themselves as happy to talk to the media when writing to thank you for support always keep a record of these gems but don't take advantage of people's gratitude Never pressurise a grantee to talk to the media Get copies of all photographs generated from these case studies</p>
<p>Negative media stories These often relate to individual stories and can be very damaging. Contact the media source directly and offer to discuss the case with the individual directly</p>	<p>The media is not a suitable environment to answer or describe complex reasoning behind individual decisions. It is best to ensure a general answer as to the nature of the appeal is given and individuals are invited to contact the Foundation directly.</p>
<p>Interviews Worth considering if you have a member of staff who is confident enough to manage the process and you know that the subject of the interview is not contentious</p>	<p>Ensure you gather as much information as possible about the content of the interview and have plenty of facts and figures to hand</p>

Learning points
<p>Do not be drawn into debate within the media about grant making it is not a suitable medium for complex often legal issues</p>

Pre-planning subjects	
<i>Topic</i>	<i>Outcome</i>
Media contact list	An up to date list of key media contacts
Press release - prepare a press release template that include notes with good basic information describing what a Community Foundation is and what yours has achieved in the local community	A press release that provides good quality background information
PR company - if you want to go down the route of using a PR company at during an appeal make contact	A company that fully understands how your Foundation operates and may also consider providing their support as a donation to the appeal fund

Documents available on TCFN website:

Sample press release templates

Life after the appeal

Closing down an appeal can be a difficult process. It is a fine balance of recognising continuing need and setting this against donor fatigue and your organisations ability to continue to sustain a elevated work load. Getting it right is important. Winding down the appeal provides some useful pointers to this part of the appeal process.

There is no doubt that a disaster appeal will have a huge impact on a Community Foundation. With planning and care much of this impact will be of a positive nature and there is much that the Foundation can gain including knowledge, skills and experience and the increased profile in the local community. The section entitled maximising the impacts provides some useful guidance.

Winding down the appeal	
Subject	Comments
Assessing continuing need At 4-6 months into the appeal it is worth undertaking a 'rough and ready' assessment of anticipated need for funding and how long the need will continue	This will help you to plan spend, but bear in mind there is a need to balance ongoing need against being seen to deliver funds as quickly and effectively as possible.
Assessing donor fatigue There will be an initial wave of donations generated by media this will be followed by a more prolonged period of giving generated by fundraising events and applications to charitable trusts and foundations	Along side your assessment of continuing need this is a key factor in supporting your decision to close the appeal
Assessing the organisations ability to sustain the appeal Although your organization may recognise an ongoing need for appeal funds you will need to assess the organization and its staffs ability to sustain activity at an elevated level	
What to do with monies left	See previous section
PR & media Once you have made the decision to close the appeal the media is hugely important in getting the message out to the general public	The media is particularly important in getting the message out to individuals
Evaluation, review etc A formal review/evaluation of the appeal can be a useful tool for the promotion of the Foundation. If you decide to undertake a review/evaluation consider what elements of the appeal you wish to evaluate fundraising, grant making or both.	It can be difficult to identify appropriate funds from within the appeal to undertake an evaluation. You may wish to consider using the Foundation donation to the fund or monies provided by local district or county council

Maximising the impacts of the appeal	
Subject	comments
<p>Donors - Do provide donors to the appeal fund with a newsletter or some form of documentation that provides a summary of the appeal and what has been achieved</p>	<p>As expressed previously in this toolkit the conversion rate of appeal donors into long-term supporters of a Community Foundation is very poor do not expend too many resources</p>
<p>Media contacts and attention Build on good will developed during the appeal and continue to provide regular press releases about your work</p>	
<p>New contacts (not donors) Staff will have developed a range of new contacts during the appeal it is worth spending some time identifying those that are significant and need further nurturing</p>	<p>This may in particular include politicians and senior county and district council staff</p>
<p>Organization profile During the course of the appeal the Foundation's public profile will have been raised consider how the Foundation can benefit from this. In its simplest form this may include making reference to appeal success in all Foundation literature</p>	<p>Consider applying for local or national awards that recognise the success of the appeal</p>
<p>Staff and Trustees - Many staff, volunteers and Trustees will have developed confidence, a range of new skills and taken on additional responsibilities during the course of the appeal. Consider ways that these new skills can be used to benefit the Foundation Consider providing a post appeal appraisal for each member of staff in addition to the annual appraisal.</p>	<p>The flip side of this is that some staff may return to old roles that they no longer find stimulating or challenging.</p>

Learning points
<p>The appeal will provide a huge amount of learning to your organization make sure that as much of this learning as practicable is documented. Staff and Trustees with experience may well move on and their knowledge lost.</p>
<p>The appeal document must include a description of how any money left unspent when the fund is closed, is to be allocated otherwise there is a danger that you are left with money that it is virtually impossible to allocate. You may wish to consider a general disaster pot into which this money is put to support any future disaster appeals.</p>

Pre-planning	
<i>Topic</i>	<i>Outcome</i>
Post appeal appraisal document	An appraisal document that provides staff with opportunities to discuss their experiences, new skills and confidences they may have developed and how they would like to use them within their current role

Documents available on TCFN website:

Sample evaluation/review documents

Appendix 1

List of conference delegates March 2007

This list also includes information, where relevant, about 'disaster appeals' run by Foundations in the list.

Appendix 2

List of sample documents available on TCFN website www.XXXXXX

Appendix 3

Pre-Planning

Set out below are each of the Pre-planning sections from the document chapters.

Pre-planning subjects	
Topic	Outcome
Open discussion with Trustees about general principle of running a disaster appeal	Establish whether Foundation would consider running an appeal and what planning needs to be undertaken to ensure the Foundation is prepared

Pre-planing topics	
Topic	Outcome
Do your organization's objects enable you to run a disaster appeal	Make suitable alterations to governing document if appropriate
Do your organization's objects enable you to support individuals	Make suitable alterations to governing document if appropriate
Does your organization's governing document give you permission and provide details on how to make decisions outside usual due process	Make suitable alterations to governing document if appropriate
Do you have in place policies for delegated grant making	Develop suitable policies
Consider identifying and training Trustees who could take on a significant role in the event of a disaster appeal	The creation of a team of trained/knowledgeable Trustees who have the skills and authority to take action immediately

Pre-planning topics	
Topic	Outcome
External collection points	A bank or building society that has offered to undertake this role at the time of a disaster.
Fund raising guide - you may be able to amend a similar document that you have already prepared for general Foundation fund raising	A document ready to go when needed

Pre-planning topics	
Topic	Outcome
Giving to individuals - you will need to establish if this is something your organization wants to undertake and if so if your governing document allows you to	

Pre-planning subjects	
<i>Topic</i>	<i>Outcome</i>
Media contact list	An up to date list of key media contacts
Press release - prepare a press release template that include notes with good basic information describing what a Community Foundation is and what yours has achieved in the local community	A press release that provides good quality background information
PR company - if you want to go down the route of using a PR company at during an appeal make contact	A company that fully understands how your Foundation operates and may also consider providing their support as a donation to the appeal fund

Pre-planning	
<i>Topic</i>	<i>Outcome</i>
Post appeal appraisal document	An appraisal document that provides staff with opportunities to discuss their experiences, new skills and confidences they may have developed and how they would like to use them within their current role

Appendix 4

Slides from presentation made to TCFN Peer Exchange conference delegates by Andrew Beeforth Director of Cumbria Community Foundation. The presentation sets out information about the two award winning disaster appeals Cumbria Community Foundation ran in 2001, in response to the foot and mouth disaster and 2005 in response to a major flood and storm.

Appendix 5

Slides from presentation made to TCFN Peer Exchange conference delegates by Mary XXXXX President of the Dallas Community Foundation. The presentation sets out information about the appeal set up in 2006 in response to the influx of XXXXXXXX who came to Dallas in the wake of Hurricane Katrina.