CHAPEL & YORK'S TRAINING OPPORTUNITIES – 2010

Evaluate the considerable opportunities of American and European Fundraising specifically for your organisation.
See below for our varied programme of seminars, which can be tailored to suit you and your fundraising requirements

Look at the Learning outcomes to determine which seminar is relevant to your needs

All dates, times and venues will be published on our website
www.chapel-york.com

Prices quoted are subject to early bird discounts
Chapel & York is completely flexible and is happy to discuss adapting seminars to suit client/member requirements.

14th January, 2010

Seminar Title	Content	Learning outcomes	Times/Costs & other details
American Philanthropy and the Third Sector – a guide to fundraising from the United States	**Part I: Understanding the technical issues:** A practical introduction to how US non-profit tax and legal systems work for individual US donors, US grant-making Foundations and US Companies, and how non-US charitable organisations can benefit. **Part II – Sources, Research and Application:** An overview of the sources of funding available, including why American philanthropy is important as an alternative source of funding; Individuals, Federal Government, Companies and Foundations; accessing these sources; some technical points related to each source; applying to the different sources.	At the end of the seminar participants will:- • Understand the legal & financial complexities involved in fundraising from the United States; • Gain an understanding about whether the benefits outweigh the costs of registering to fundraise in the United States. • Understand the importance of American philanthropy; • Know what sources of funding are available, and how to access them; • Have an understanding of some of the technical differences between the US & the UK; • Understand some of the principles involved when applying to different sources of funding.	Duration: 5 hours Cost: £125.00 + VAT per delegate, which includes all course materials, lunch and refreshments. The price also includes a free telephone consultation after the seminar. Seminar presenters: David Wickert & Peter Haley – see biographies overleaf.
Seminar Title	**Content**	**Learning outcomes**	**Times/Costs & other details**
Setting up & Managing an American Charity - *effectively* (Technically a Section 501(c)(3) tax-exempt organisation) that is supporting your non-US charitable organisation.	US Non-profit tax and legal arrangements. Public Charities and Private foundations. US tax and legal issues for charitable organisations based outside the USA. Setting up a 501(c)(3). Appointing directors and officers; insurance; board meetings; financial management; bank and brokerage accounts; accepting credit cards; tax receipts; anti money-laundering policy; conflict of interest policy; liability insurance; US sanctions; grant making and grant applications; membership and the value of benefits; websites; IRS audit; 990 tax return; State registration; charitable solicitation and sales tax; Planned Giving including bequests.	As a result of attending the seminar, participants will:- • Identify the advantages & disadvantages of establishing a 501(c)(3) organisation; • Understand the setting up process – registration and application for tax-exempt status; • Gain a better understanding of all the operational issues involved; • Learn about the maintenance and administration of a 501(c)(3); • Develop policies to ensure the 501(c)(3) is fit for purpose at all times.	Duration: 5 hours Cost: £125.00 + VAT per delegate, which includes all course materials, lunch and refreshments. The price also includes a free telephone consultation after the seminar. Seminar presenter: David Wickert.

Seminar Title	Content	Learning outcomes	Times/Costs & other details
Fundraising from America and Americans - Sources, Research and Applications	Why American philanthropy is important; an overview of the technical and legal issues involved; sources of funding available – Individuals, Government, Companies and Foundations; some of the specific procedures involved when fundraising from each of these sources; how to access potential donors from these sources; application writing as it applies to each source.	By the end of the seminar delegates will:- • Understand the importance of United States philanthropy; • Have an understanding of the legal and technical issues involved; • Acquire an understanding of the sources of funding available and how to access them; • Have an understanding of some of the technical aspects of fundraising from each of the sources; • Be aware of the differences you will need to know when applying to the various sources.	Duration: 3½ hours Cost: £99.00 +VAT per delegate, which includes all course materials and refreshments. Seminar presenter: Peter Haley
Seminar Title	**Content**	**Learning outcomes**	**Times/Costs & other details**
American Foundation Research – Researching US Foundations, a practical approach.	Test the multi-million dollar funding opportunities of US Grantmaking Foundations. Includes 3 hours of hands-on research at a dedicated workstation using the most up-to-date and comprehensive US foundation database available. Also includes: Why American Foundations are important; an introduction to the technical aspects of fundraising from American Foundations; research resources and the research process; and an overview of writing winning proposals.	Having attended the workshop, participants will: • Have an understanding of the importance of American Foundations as an alternative source of funding; • Understand the basics of the technical issues involved; • Understand how to get the best possible benefit from your research; • Have a list of potential funders from which further research can be carried out to identify those to whom an application can be made; • Have an understanding of the application process.	Duration: 7 hours Cost: £201.25+VAT per delegate, which includes all course materials, lunch and refreshments. (Early bird discount: 15% = £175.00+VAT) Workshop presenter: Peter Haley.

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Fundraising from America – A Taster in Just one hour	An abridged version of the 'American Philanthropy' seminar above.	By the end of this session delegates will be able to:- • Understand what the various sources of funding are and how to go about accessing them; • Have an overview of some of the technical differences between the US & the UK; • Understand some of the differences you will need to know when applying to the different sources of funding.	Duration: 1 hour Ideal for slots at Fundraising Conferences. Costs to be determined. Presenters: David Wickert or Peter Haley

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Fundraising from Europe: Part I: Donors from Europe – people, companies & foundations	An introduction to the largest philanthropic market outside the USA – the multi billion philanthropic market in continental Europe. The market will be covered, explaining the background to philanthropy in Europe, showing examples of current giving and fundraising, and illustrating where and how UK organisations have succeeded in winning funds, as well as the potential pitfalls. You will be shown where and how to find out more about people, companies and foundations as donors, and outline successful strategies for development.	After attending the seminar participants would expect: • A clear, objective, overview of the philanthropic market in continental Europe; • Examples of successes in Europe; • Examples of strategies for fundraising in Europe; • An opportunity to discuss issues involved and the potential for their own organisation; • A list of sources of further information on philanthropy in Europe;	Duration: 6 hours Cost: £205.00+VAT per delegate which includes all course materials, lunch and refreshments. Speaker, Part I: Chris Carnie, Factary Biography – see overleaf
Part II: EU Grant Opportunities	The presentation will detail the EU grants available from the various EU institutions and will give an overview of: • How to locate information about the EU grant opportunities available; • How to set about applying for a grant; • The general principles to keep in mind when applying; • What happens if a grant application is successful e.g. audit procedures; • Exploring a number of myths surrounding EU funding; Real examples of successful and unsuccessful applications will be given and participants will be given the chance to discuss their own potential schemes.	Following the presentation participants will: • Have a better understanding of how the EU Commission administers its numerous grant regimes; • Where to find the information about the grants; • How, when and where to apply for grants; • Have a better understanding of best practice procedures when applying.	Speaker, Part II: Dr. Paul Quantock, Senior Partner, European Consultancy Services Biography – see overleaf Delegates will also receive a complimentary copy of EU Grants Directory 2009 (which includes 12 months access to EU Grants Update Service)

Biographies:

David Wickert
Director of Chapel & York since 1997. Trustee of the ASDA Wal-Mart Foundation. 1986-97 a Director of the Charities Aid Foundation, launched Give As You Earn, first Director of CAFAmerica in New York City.

Peter Haley
Six years with Chapel & York as Head of Research, specialising in the United States, Editor of the Directory of American Grantmakers 2008/2009.

Chris Carnie
A research consultant, specialising in strategic funding – gifts, grants and investments by philanthropists, foundations, companies and government – in Europe. He has worked in fundraising since 1980 with the Muscular Dystrophy Group, Voluntary Service Overseas and Kings College Hospital, London, and was a researcher in the House of Commons 1982-84. In 1990 he co-founded Factary, Europe's leading prospect research agency. In 1993 he became the first advancement researcher to be elected a Fellow of the Institute of Fundraising, and in 1999 the first to be appointed a Fellow of the Royal Society of Arts. He was Founder Chair of ICFM Researchers in Fundraising, and is a member of the Association of Professional Researchers for Advancement (USA), of the Association for Research on Nonprofit Organizations and Voluntary Action, of the International Society for Third-Sector Research, of the Association Francaise de Fundraisers and of the Asociacion de Profesionales de Fundraising, Spain. Chris has been involved in the development of venture philanthropy in Europe since 2003, and is a member of the Finance and Funding Group of the European Venture Philanthropy Association.

He writes and trains in fundraising research for NGOs and professional bodies including the International Fundraising Congress where he is a regular Master Class leader. He is the management level trainer in major gift fundraising at ESSEC for the Association Francaise de Fundraisers' postgraduate course. His first book on prospect research "Find the Funds – a New Approach to Fundraising Research" is published by Directory of Social Change, London. His second book "Fundraising from Europe" was published in 2003 by Chapel & York, London. He is a contributing editor of Major Donor Prospect Research: Fundraising from the Millionaires In Your Database and Online, published by John Wiley, New York, in 2006.

Dr. Paul Quantock
Dr. Quantock has been assisting organisations throughout the world to secure European Union funding since 1973. Using European Union grant funding, he has been involved in the development of numerous Internet based training programmes for all ages and levels of ability. The value of e-learning programmes is now well recognised by many different training and education institutes throughout the world. A personal passion of his is "social inclusion", particularly in the field of ICT learning and access for people with a learning disability. He has raised over €2 million from the European Union to develop specific programmes to ensure social inclusion for people with learning disability.

In 2006, together with influential Indian figures from Government and NGOs circles, he created the "India Healthcare Training Think-Tank" to advise on the future training needs for India in the healthcare sector and is the Joint Chairman. He has written many articles, and given numerous presentations around the world, and also has written a book entitled "1992 and beyond" published in the USA – designed to inform small firms about the European financial services industry. He was also joint editor with Bradford University (UK) for the series of eight publications detailing issues of various European Union policies e.g. environment, social and regional development. He has also been recognised by the Governor and Secretary of State for the Commonwealth of Kentucky, USA for his international work and was awarded their highest honour, that of Kentucky Colonel. He is currently working on training and advisory projects in India, Asia, Middle East, Eastern and Western Europe, China and the USA.