

Online Fundraising in China A Research Report on Third Party Platforms in 2014

CAFP Research



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About China Association of Fundraising Professionals (CAFP)

Illustration of This Report

This report, the first ever research report on the industry by China Association of Fundraising Professionals, was made possible by joint efforts of the Department of Social Responsibility, Alibaba Group and Recende Fundraising Research Center.

This report aims at looking deep into the general situation of online fundraising platforms run by third parties and their major participants in 2014, in which third party players refer to fundraising platforms, Charity crowd-funding platforms and Charity E-shops but exclude self-owned contribution platforms set up for financing purpose such as their official websites or WeChat donation channels. Many measures like data survey, interview and control study have been employed in conveying the development of the third party online fundraising platforms by taking into account of the donation amounts, frequency, variations and donors' behavior as well as those platforms' performance to display from a relatively comprehensive angle how Non-profit Organizations are functioning on third party platforms and how the platforms themselves are running. By doing so, the report wishes to make its contribution to raising charity funds and prompting the development of online donation in China.

Special thanks to the following organizations for giving tremendous support to this report (random sequencing is adopted):

Alibaba Group, Department of Social Responsibility
Ant-Love
Sina-Gongyi
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China Foundation for Poverty Alleviation
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China Association of Fundraising Professionals (CAFP), co-founded by the Narada Foundation, The One Foundation, China Foundation for Poverty Alleviation, Dunhe Foundation, CSR Department of Alibaba Group, and Beijing Recende Fundraising Research Center in 2015, is the first membership association dedicated to promote the communication among Chinese professional fundraisers. With a membership of more than 100 individuals and organizations, CAFP has been hosting the China Fundraising Professionals Forum and fundraisers' salons, translating and publishing international fundraising publications, conducting industry researches, introducing and promoting the Statement of Ethical Principles in Fundraising, and compiling membership periodicals featuring updated information in the field of fundraising.

Introduction of Founding Members

Narada Foundation



Founded on May 11, 2007, Narada Foundation is a private foundation approved and supervised by the Ministry of Civil Affairs of China, with a registered capital of 100 million Yuan (\$15.4 million) donated by Shanghai Narada Group Co., Ltd. Mission: Foster Civil Society

We focus on China's social problems in transition, making grants for excellent philanthropic programs conducted by non-profit organizations so as to foster social innovation and help build a harmonious society.

Vision: Every Heart Shall Carry Hope

When there is hope within us all, then our society holds a promising future.

Narada Foundation is dedicated to initiating and supporting programs that develop the infrastructure of the philanthropic industry, providing financial support to strategic programs involving supporting organizations, leading organizations, and programs that cultivate excellent charity talents, and funding specific fields programs such as education of migrant children and disaster relief. In addition, Narada Foundation shall conduct strategic and policy researches to guide the above-mentioned pillar programs.

CFPA has always been committed to discover and address social problems, taking donors, volunteers, and all caring people as partners for continuous renovation, to build the most trustworthy, most awaited and most respected international non-profit platform.

Dunhe Foundation



Dunhe Foundation is a grant-making private foundation established in May 2012 under Zhejiang Ministry of Civil Affairs. It focuses on developing nonprofit sector, passing on traditional Chinese culture, and is dedicated to be the resource provider and driving force of grass root charity and social innovation.

Alibaba Group, Department of Social Responsibility



Based on its e-commercial platform and internet technology, Alibaba hopes to facilitate the NGOs' development and transparency in publicity, as well as to improve the participation of the public on charity. In accordance to the belief, Alibaba has created serial philanthropy network products, such as charity E-shop, item-sell-for-charity project, charity crowd-funding, etc. In cooperation with its subsidiary corporation Anti Financial Group, Alibaba helped to fundraise over ¥280 million (\$43.1 million) for about 500 NGOs, engaging over 200 million people in benevolence directly in 2014. Besides, Alibaba Foundation donated ¥87.43 million (\$13.43 million) itself to support varieties of philanthropic areas, mainly in the conservation, vulnerable group empowerment, philanthropy industry development, disaster relief, etc.

The One Foundation



In 2007, Jet Li founded the organization to operate as a charity fund to carry out programs and projects benefitting the welfare of China.

On January 11, 2011, One Foundation was registered and officially became a public fundraising foundation, committed to providing a professional and transparent public service platform.

Mission: Build effective platform for public participation in social welfare development

China Foundation for Poverty Alleviation



China Foundation for Poverty Alleviation (CFPA) is a nationwide poverty-reduction nongovernmental organization, registered with Ministry of Civil Affairs in 1989 and supervised by the State Council Leading Group Office of Poverty Alleviation and Development. With support from all sectors of society, by the end of 2014, CFPA accumulatively raised the poverty alleviation funds and materials of RMB 13.089 billion (about \$2 billion), benefited 20,783,300 person-time in the impoverished condition and the disaster areas. CFPA hence is the largest and most influential NGO in China.

Beijing Recende Fundraising Research Center



Founded in October 2013, Beijing Recende Fundraising Research Center focuses to drive the development of fundraising industry and provide fundraising consultation to nonprofit organizations. Recende takes international fundraising experiences and best practices and adapts to Chinese society to help nonprofit organizations to develop long-term fundraising strategies, design fundraising programs, implement fundraising campaigns and provide training sessions for fundraising professionals.



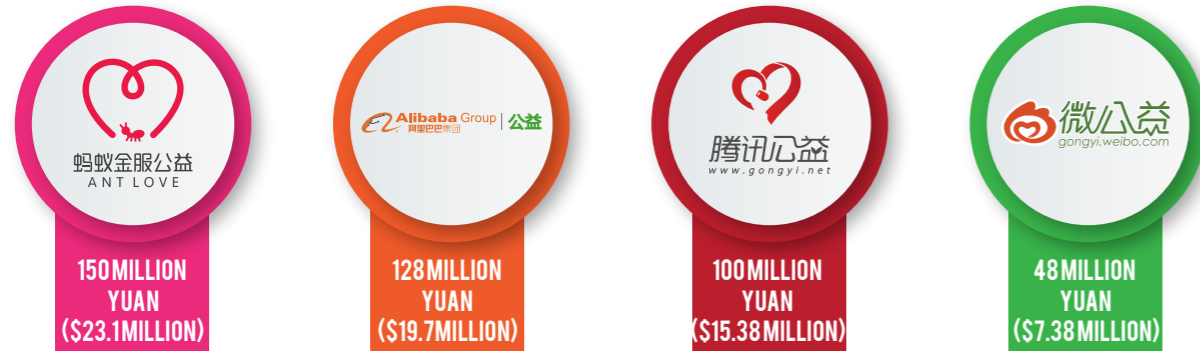
Research Report on China's Third Party Online Fundraising Platforms in 2014

I, Overview of the Development of China's Online Fundraising in 2014

With the rapid development and widespread utilization of mobile internet, online fundraising was accordingly soaring in 2014 when small and medium sized organizations were trying all types of online fundraising which has been further and further diversified in unprecedented forms and channels. At the advent of mobile internet era, the way of people's life has been undergoing fundamental changes and third-party online fundraising platforms are gradually making their way to the spotlight.

An estimated figure of over 437 million RMB (\$67.2 million) has been secured on third-party fundraising platforms of all types in 2014 in 1.17 billion doles. Being the most zealous internet firms, Tencent, Alibaba, Ant Financial and Sina worked out their own third-party platforms with versatile channels for enhanced public participation. Respectively, Tencent Gongyi, Alibaba CSR², Ant Love, and Sina Gongyi, the mainstays of the cause raised 426 million RMB (\$65.5 million) in 2014, around 97.5% of the total.

Summary of China's Third-party Online Fundraising in 2014



(I), Summary of China's Third-party Online Fundraising in 2014

With various features of China's third-party online fundraising platforms, they can basically be categorized into three types: for donation, for crowd-funding, and for charity E-shops considering their distinction in feature and operation mode.

For donation	For charity crowd-funding	For charity E-shops
Based on commercial platform Sina gongyi Tencent gongyi Ant love	Vertical charity crowd-funding website huangyigu i shan alliance in gongyi etc.	Item-sell-for-charity Projects by Taobao & Tmall
Independent online Donation platforms Cash donation (51give, quangongyi etc.) non-cash matching donation (Imore app, china duck race app etc.)	eneral crowd-funding platforms rowdfunding. Com aobao crowdfunding d crowdfunding etc.	Charity E-shops Taobao charity E-shop Tmall charity E-shop Wechat charity E-shop

① Here the data include the total amount that were raised in 2014 on Tencent Gongyi, Sina Gongyi, Ant Love, Quangongyi, 51Give, as well as on those main charity crowd-funding platforms mentioned in this report, Alibaba E-shops and Item-sell-for-charity project.
 ② Alibaba Gongyi Platforms include Alibaba charity E-shop, Item-sell-for-charity project on Taobao and Tmall as well as Taobao Crowd-funding.

1, Donation Platforms

Donation platforms include those based on commercial platforms and independently operating ones, with the requirement of public offering qualification for sponsors who shall disclose the performance of the projects as per the demand of the platforms, however, the sponsors will always have access to the charity funds regardless of the funding target being achieved or not.

(1), Online Donation Platforms Based on Commercial Platforms

Such platforms are usually one of the many business lines run by commercial sectors, functioning as a presentation of the social responsibility undertaken by commercial organizations that contribute to the majority of the donors. They are the first runners, rather developed, working on most projects with most organizations, largest donor population and best fundraising capacity. Out of all, stand beautifully Sina Gongyi, Tencent Gongyi and Ant Love (used to be AliPay E-Platform).

Such platforms, compared to the others, are bestowed with the most plentiful online functions and forms. Taking the very 3 top players as an example (see below):

Table 1, Functions of 3 Top Online Donation Platforms

Function Name	One-off Donation	Monthly Donation	Non-cash Matching Donation	Charity Auction	Others
Sina Gongyi	Brand Donation Individual Donation	-	Forwarding /weibo Sports ³	Micro-auction	-
Tencent Gongyi	Tencent Happy Donation	Tencent Monthly Donation	Wechat Sports ⁴	-	Donate Together
Ant Love	One-off Donation	Monthly Donation	Walking Donation ⁵	-	Revenue Donation ⁶

In 2014, Sina Gongyi, Tencent Gongyi and Ant Love raised 298 million RMB (\$45.85 million) combined, about 2.6%⁷ of the total amount given by individuals in China, out which, Ant Love alone raised 150 million RMB (\$23.08 million) by around 8.11 million dole-outs, the best performer in the year in terms of both amount and number of participants while Tencent Gongyi enjoyed another best name: the supreme fundraiser for average single donation, about 20 Yuan. Sina Gongyi, however, had another biggest figure—5883 projects in the year, in which 5516 projects were for individual relief cases, accounting for 93.8% of all projects attracted by the platform.

Table 2, Overview of the Fund Raised Through Online Platforms Based on Commercial Sectors



③ Sina Campaign was launched by Sina Gongyi in 2015
 ④ WeChat Campaign was launched by WeChat in 2015
 ⑤ Ant Financial launched a "Donate while Walk" program on Alipay Wallet App in October, 2015
 ⑥ Ant Financial launched a "Revenue Donation" program on Alipay Wallet App in August, 2015
 ⑦ the total amount of individual donations reached 11.56 billion RMB in 2014, from "Report on China's Charity Donation in 2014".
 ⑧ in this table, all figures are rounded to the same decimal for uniformity purpose. Fund amounts and number of participations are approximate whole numbers while single donation figures are rounded to the nearest first decimal.
 ⑨ cited from "the 3rd anniversary of Sina Gongyi, We raised 240 million Yuan", <http://gongyi.sina.com.cn/guzx/2015-01-14/1159512.html>
 ⑩ here the figure given is the number of participations between March, 2013 to March, 2015 for reference.
 ⑪ all figures about Tencent Gongyi are cited from "Report on Tencent Corporate Social Responsibility, 2013-2014".

(2), Independent Online Donation Platforms

Sponsors of independent platforms may vary from NGOs to commercial organizations while donors mainly come from successful promotion of the platforms themselves. In more developed areas like UK and the US, such platforms play the main role in third party online donation. However, as they require more robust technology and better propaganda to attract network traffic, they are rather rare in China and are lingering behind, not comparable to those commercially backed ones.

For those pioneering independent players, they can again be classified into two types: cash donation platforms and non cash matching funds.

1), Cash Donation Platforms:

In 2014, the representatives were 51 give and Quan Gongyi.

Ever since 51give came into being in 2007, it reassures all donors by sending a acknowledge email and giving them access to tracking where their donations are. It has established a Charity Hit Roll to give weekly/monthly and general ranking to individuals and similarly to organizations but on a monthly/yearly basis. Currently, only public offering institutes can launch projects through 51give and in 2014, it raised 2.12 million Yuan (\$0.33 million) through 4435 donations in 98 projects out of which 31 were newly launched. The average sum for each donation is 478 Yuan (\$73.54)¹².

Quan Gongyi, an occupational public offering fundraising platform, was initiated on November 4th, 2013 and run exclusively by Shanghai Soong Ching Ling Foundation. By 31st, December 2014, it absorbed up to over 1.376 million Yuan (\$0.2 million) in which 1.177 million were raised in 2014 alone with 637 donations (single donation sum averaged 1,847.7 Yuan (\$284) (including corporate contributions). By the end of 2014, 54 organizations have chosen Quan Gongyi with 57 projects in total, in which 22 organizations were newly settled and in the meantime 37 new projects were launched. Each project raised an average sum of 20,649.1 Yuan (\$3177). At present, the OPEX for Quan Gongyi comes from the non-directional donation through Shanghai Soong Ching Ling Foundation.

From the combined analysis of the sponsors, donors and donation process, there serve more or less the same function of commercially run online donation platforms, however, it is such a toddler with very small size that how it may stand out from the others will remain a big challenge for them.

2) Non-cash Matching Donations (Pcs & Mobile Terminals)

On non-cash matching donation platforms, no cash donation would flow other than step counts, time, repost times etc. corporate offers matching funds, carried out by NGOs or volunteers. The first appearances of such platforms ever seen in China were WeChat-repost-donations that was based on commercial operations, Cha-Gang network with its “one-grain” Love and those only lately came into front stage like Walk-Charity APP for donating “step counts”, China duck race App and the like.

In the wake of nationwide fitness fad, sporting matching fund platforms like donating “step counts” grew drastically in 2014, peeking into a brighter market prospects.



Sporting APPs burst out all over China in 2014, many boasting over 1 million users, 12 having attracted venture investments and more and more people are involved in this sporting recording style that drives “step counts” donation in a marvelous manner¹³. Practitioners of sporting APPs forecast a sustainable rapid growth in the coming several years¹⁴. An expansive development of such platforms is looming on the horizon with the combination of sporting APPs with online and offline social media.

Take one of the bellwethers, Walk-Charity as an example. Being founded in July, 2013, and sponsored by Beijing iMore Network Technology Co. Ltd., it converts mobile phones into pedometers through which walkers can donate their step counts which will subsequently be included in corporate matching funds. Between June and December in 2013, the number of users grew by a meager 5000 or so every month, however, in 2014, the figure soared, especially after it successfully made its way to the selection of iPhone Apps in August with nearly 60,000 users registered every month onwards and reached 150,000 in October. The total figure in the same year broke through 600,000 while accumulatively over 1.1 million Yuan funds have been raised with 36 corporate participants in which 17 are publicly listed.

It evolves into a fashion, a life style in 2015 with promising prospects though at same time, facing homogenous competition from commercially run platforms. For instance, WeChat, a Tencent SNS attracted 1.63 billion step counts via 116 million donations the very night it launched Step Count Donation function while QQ Health Center gained 29.55 million step counts by 2,595 donations¹⁵.

Differences between commercially run online donation platforms and independent players:

1, Commercially run platforms are usually larger on scales.

Compared to independent online players, those commercially supported platforms can always attract more funds and participants, they are also better in gaining organizations or projects. For one thing, the huge network traffic the commercial platforms generate can absorb more net flow for their donation platforms, for another, they are much more experienced in operation and promotion and can effectively boost the monetary conversion efficiency for better results of fundraising due to their better understanding and control of their users. Besides, a good and big brand always speaks louder and can bring about more positive resonance thus to win over the trust of donors.

2, Independent donation platforms can place themselves in a more precise position with focused eyes.

Though they may lack for abundance in donation forms and functions as commercially run platforms do, independent players know where to get seated and how to use their focuses. For example, 51give and Quan Gongyi all concentrate on project donations when Walk-Charity APP and China Duck Race App are bent on step counts and game matching funds respectively. They are aware of their insufficient capacity of attracting net streams that reversely drive them to maximize their uniqueness for preferential weight and better growth.

Therefore, in choosing a third party platform for donation, Non-profit Organizations are advised to analyze the characteristics of the options available with the particular features of their projects and resources to make the most suitable decision for better results or stronger propaganda.

¹² here figures are cited from 51give Annual Report, <http://www.51give.org/aboutus.php?id=report>

¹³ “12 Sporting Charity APPs gained venture investment”; <http://news.cnhubei.com/ctjb/ctjbsgk/ctjb23/201411/13100303.shtml>

¹⁴ Cited from “Will Sporting Sociality leads to Sporting APP Financing Cult?” http://news.ifeng.com/a/20150414/43544308_0.shtml

¹⁵ cited from “Step counts achieved on WeChat can be donated by Matching Gifts to children in remote areas”; <http://mt.sohu.com/20150730/n417846549.shtml>

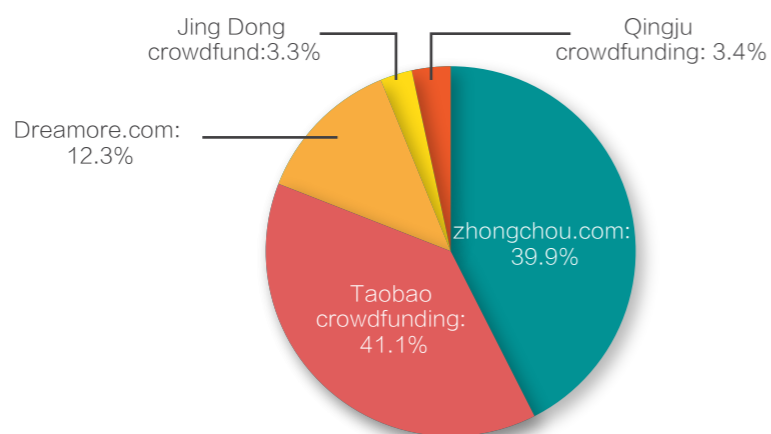
2, Charity Crowd-funding Platforms¹⁶

Charity crowd-funding platforms have similar sponsors as the first type of donation platforms, namely, they are run primarily through commercial platforms where Charity crowd-funding is only a partial function, however, they do differ from the first type as their sponsors need to design a target amount, together with a time-line and a compensation plan for donors, either tangible or intangible. They may appear to be vertical funding platforms like ideagood.org, jishanzhijia.com and xingongyi.org or work as general crowd-funding platforms such as crowdfunding.com, Taobao Crowdfunding, JD Crowdfunding etc.

The main differences between these and the first type of donation platforms lie in the following: the qualification requirements for the sponsors are relevantly loose, meaning an individual may serve the purpose¹⁷; before the kickoff of a project, specific compensation plans for the donors shall be set up; when the fund raised fail to meet the target, according to the principle of Crowd-funding, the amount raised shall be returned to the original donors¹⁸; however, donation forms require that an sponsor shall have public offering qualification and shall disclose to public the implementation progress of the project but without being obliged to giving compensation for donors; in case the fund target is not achieved, the sponsor is still allowed to use the amount raised.

With lower threshold, crowd-funding platforms cured the headache of public funding qualification requirements. One salient example is Zhongchou.com, in which 60% of sponsors are Non-profit Organizations while individuals account for 40%. The majority of the Non-profit Organizations are grassroots startups and youngsters in their 30s or 20s have a larger weigh in sponsor structures. These youngsters are zealous supporters of NPOs, proficient in internet knowledge, willing to share and are tenacious enough to achieve goals with all resources they can reach. In 2014, the total Charity crowd-funding market grew to 12.56 million Yuan (\$1.93 million) with Taobao Crowdfunding accounting for 41.1% while zhongchou.com, 39.9%. In terms of projects, zhongchou.com carved 60.2% while Dreamore.com managed a share of 22.7% and Taobao Crowdfunding, 11.4%.

Table 3, Pie Chart of Crowd-funding Platforms in 2014



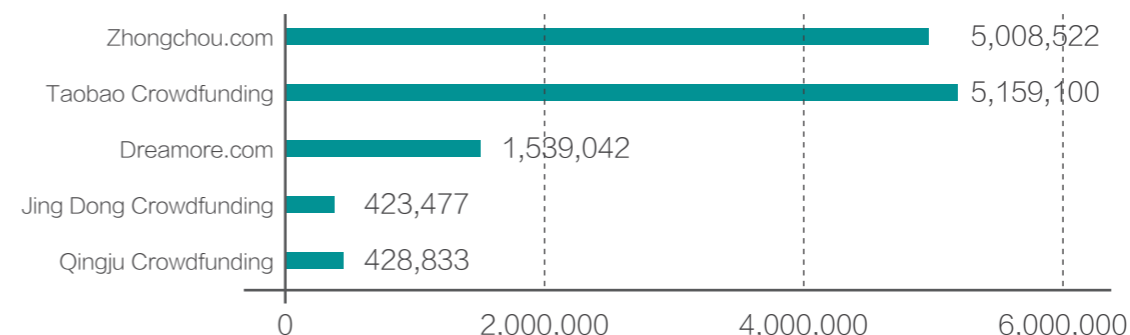
Take zhongchou.com as an example, 30.9% of the projects, namely 159 fared successfully out of 514 total projects it had in 2014, totaling 5,008,522 Yuan (\$770,542) via 21,638 donations, around 10.2% of all funds it raised¹⁹. The average amount of each project is 31,500.14 Yuan (\$4846). From such figures, it is clear to us that fund raised through Charity crowd-funding platforms accounts for a rather small percentage of overall funds they are raising and success ration needs to be improved. Also, whenever a project fails, the funds raised are supposed to be returned to the donors that might lead the sponsors to suffer losses. Nevertheless, successful projects can help Non-profit Organizations gain loyal long-term donors.

Charity crowd-funding platforms launch, more often than not, creative, joyful and positive projects which encourage public to invest in such charitable ambitions of the sponsors who shall, in return, provide compensation for their donations, thus beefing up the cost. Therefore, despite that such platforms lay down lower thresholds, not every Non-profit project can find their way smoothly on them, such as those projects without a clear fund target, or in lack of stories or struggling for a decisive budget.

Table 4, Overview of Crowd-funding Platforms Performance in 2014

Name	Founding date	Sponsor	Amount raised in 2014(RMB)	Participation times	Successful projects in 2014
Zhongchou.com	February, 2013	Zhongchou.com	5,008,522(\$4846)	21,638	159
Taobao Crowdfunding	December, 2013	Alibaba	5,159,100 (\$793,707.7)	140,600	30
Dreamore.com	September, 2011	Dreamore.com	1,539,100 (\$ 236,784)	4,710	60
Jing Dong Crowdfunding	July, 2014	Jing Dong	423,477 (\$65,150.3)	6,996	9
Qingju Crowdfunding	January, 2013	Qingju Crowdfunding	428,833 (\$65974)	1,050	6

Charity Funds Raised on Crowd-funding Platforms in 2014 (Yuan)



As we may note from the above table, the funds raised on Taobao Crowdfunding and Zhongchou.com are pretty close, however, when the number of successful projects on Taobao Crowdfunding is only one fifth of that on Zhongchou.com, the former is 6 times of the latter in respect to the number of participants. That gives us the illustration that with the advantage of huge network traffic magnetized by Taobao, the giant online marketplace, Taobao Crowdfunding gained more attentions and support. Meanwhile, many large, prestigious philanthropic foundations that have cooperation with Taobao, may set up their Charity E-shops on Taobao, which will help users get accommodated to donation habit. Utilizing such more recognized brands, it is easier to raise more with fewer projects.

For small Non-profit Organizations, Crowd-funding platforms provide quick and convenient solutions. They can circulate fundraising information via public channels without gaining public offering qualifications while on other online fundraising platforms, more often than not, they have to find some public offering foundations to jointly launch the project. At the same time, however, if they fail to raise the amount they aim to raise within a certain period of time, the project ends, and the funds thus raised becomes of no avail. Therefore, the project itself, credibility of the sponsors, targeted amount and return on investment may turn out to be a real challenge to small organizations.

By the first half of 2015, there are 211 existing crowd-funding platforms in China²⁰. The fad spread its influence over fundraising platforms too. For instance, Ruyibao, a donation platform, was transformed into a Charity crowd-funding website in 2015. Meanwhile, such platforms are probing other ways to even better facilitate charity such as the gradual transition of Zhongchou.com from donation to charity investment, with the hope of raising more financial resources and incubating promising Non-profit Organizations and social enterprises. They may also cooperate with companies to set up platforms, integrate various resources with the ultimate dream to solve the societal problems.

¹⁶ Part of the data are cited from "Research report on China's Charity Crowd-funding in 2014", compiled by Cao Yiping, jointly released by zhongchou.com and Beijing Recende Fundraising Study Center, 25/1/2015.
¹⁷ Taobao charity crowd-funding requires that a project sponsor shall be an official E-shop of a charity organization or an individual or merchant holding a cooperation letter authorized by an organization.
¹⁸ some crowd-funding platforms are loosening the requirement for fundraising that in case the project target is not reached, the sponsor can still have the amount already raised.
¹⁹ as shown by 01caijing's "the annual brief of China's crowd-funding industry in 2014", zhongchou.com has raised 49.17 million Yuan in 2014, http://www.01caijing.com/html/zc/1439_8230.html.

²⁰ From annual report on China's crowd-funding industry in 2015, <http://mt.sohu.com/20150721/n417210502.shtml>

3, Charity E-shop Platforms

Charity E-shops refer to E-shops open for Non-profit Organizations. They are mainly in two forms: philanthropic incentive mechanism (a typical example is Item-sell-for-charity project) and Charity E-shops.

Item-sell-for-charity project is a program with which e-sellers on Tmall and Taobao platforms will give a certain proportion of their merchandises for donation. Such merchandises will be thus labeled as “Item-sell-for-charity” to attract buyers. When the deal is done, the seller will donate the promised portion of the total amount to a designated Non-profit project. It is one of the incentive examples e-business platforms employ to encourage e-sellers to donate, an equivalent outside China is “sell for charity” adopted by eBay. In Taobao, over 1.1 million sellers have accepted “Item-sell-for-charity project” for nearly 80 million merchandises²¹. In 2014, they attracted some 203 million buyers.

Charity E-shops are those E-shops run on e-business platforms by Non-profit Organizations such as Taobao E-shops, Tmall E-shops and WeChat E-shops. In 2014, 132 new E-shops made their appearance on Alibaba platform, raising 51.105 million Yuan (\$7.86 million) by 556,000 donors in 1.112 million donations. Usually those E-shops raise fund through traditional donation or by selling derivative products. There is no limit to how many items they can sell or at what price, and Non-profit Organizations must make efforts in running their own shops. As the factors like resources and operational capacity vary, the fund-raising consequences differ a lot.

Table 5, Overview of Charity E-shops in 2014

Sponsor	Type	Fund raised in 2012-2014 (100million Yuan)	Yearly fund raised in 2014 (10,000 Yuan) (\$1538)	Number of Buyers	Times of donation ²²	Number of organizations	New organizations
Alibaba	Item-sell-for-charity project	1.07	7,221.7 (\$1111)	203 million	1.1 billion	11	7
	Charity E-shop	1.26	5,110.5 (\$786.2)	556,000	1.112 million	421	132

As it shows in the above table, Item-sell-for-charity project fared predominantly well in terms of the total amount and donation times, which was attributable to the massive participation of the e-merchants on Alibaba platform. The mechanism Item-sell-for-charity project used provide an all-win solution to Non-profit Organizations and both buyers and sellers on Tmall and Taobao platforms in that Non-profit Organizations gain funds and advocate Non-profit ideals at the same time while buyers can do their share in philanthropic deeds and sellers, by adopting charity in selling, build bigger consumer bases. All this together makes this Non-profit platform more and more popular with ever-increasing donation funds. Item-sell-for-charity project managed 1.1 billion donations in 2014, 4 times of that in 2013 with annual donation amounts reached 72.217 million Yuan (\$11.11 million), 3 times of that in 2013.

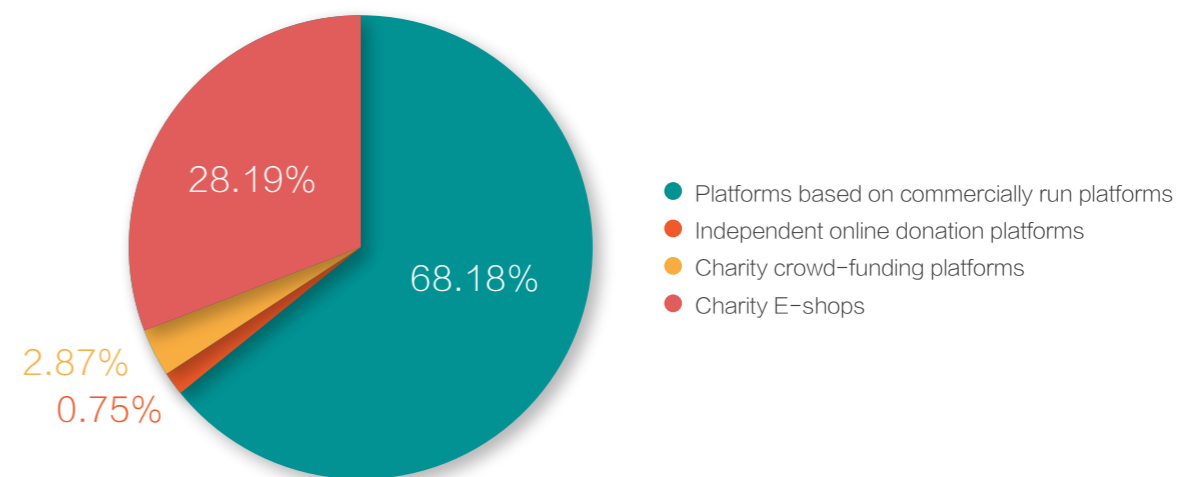
²¹ from “Report on Alibaba Corporate Social Responsibility, 2014-2015”

²² the number of donations for Item-sell-for-charity project refers to the number for buying.

4, Summary

As estimated, in 2014, the total amount of Non-profit fund raised on third-party online fundraising platforms (e.g. all the above-mentioned) exceeded 437 million Yuan (\$67.23 million)²³, accounting for 3.78% of the total donation given by individuals and 0.42 %²⁴ of all Non-profit funds China raised in 2014. About 1.117 billion donations were done on third party online platforms. Among others, those based on commercially run platforms, namely, Sina Gongyi, Tencent Gongyi and Ant Love have raised altogether 298 million Yuan (\$45.85 million) in 2014, 68.18% of the total raised by third party online Non-profit Organizations. Charity E-shop platforms, mainly Item-sell-for-charity project and Charity E-shops run on Taobao have raised 123 million Yuan (\$18.9 million), 28.19% while major Charity crowd-funding platforms like crowd-funding.com and Taobao Crowdfunding have reached 12.56 million Yuan (\$1.93 million), 2.87%; independent fundraising platforms like 51give, Quan Gongyi, 3.297 million (\$0.51million), 0.75%²⁵ respectively.

Table 6, Pie Chart of Various Online Fundraising Platforms



It is clear now that donation platforms based on commercial platforms and Charity E-shops are still the mainstays in third party players though diversification is gradually looming as the tendency. With more and more fundraising forms showing up, public getting accustomed to donation, crowd-funding platforms and independent donation platforms will usher in a better future.

²³ here the data include the total amount that were raised in 2014 on Tencent Gongyi, Sina Gongyi, Ant Love, Quanguoyi, 51give, as well as on those main charity crowd-funding platforms mentioned in this report, Alibaba E-shops and Item-sell-for-charity project.
²⁴ as “Report on China’s charity donation in 2014” shows, the total amounts of donations, both funds and materials at home and abroad in 2014 are worth 104.226 billion Yuan.
²⁵ raw data here are relatively large, those with a unit of 0.1 billion are rounded to the nearest 2 decimals and for the purpose of accuracy, raw data are used in calculating percentage.

(II), The Current Situation of Key Third Party Fundraising Platforms

Generally speaking, between 2013 and 2014, the total funds raised by the 4 big players, Tencent Gongyi, Sina Gongyi, Alibaba Group, Department of Social Responsibility and Ant Love, have relatively reduced but the participation times have obviously increased. The “big 4” raised 426 million Yuan (\$65.54million) in total in 2014, 76 million (\$11.7million) less than the figure in 2013, but with 1.117 billion times of participation, increased by 680 million²⁶ compared with 2013.

Among all, Ant Love has strengthened its force distinctly in every aspect, sitting at the apex with the largest amount of fund ever raised by a third party fundraising platform in 2014 while Item-sell-for-charity project, run by Alibaba achieved 1.1 billion times of donation. Sina Gongyi, the first third party online fundraising platform in China, after absorbed some big lumps during several emergent events including the disastrous earthquake in Ya’an, stabilized its performance in 2014 as all indexes indicated and tilted its service tactic toward propaganda by utilizing its unique characteristics.

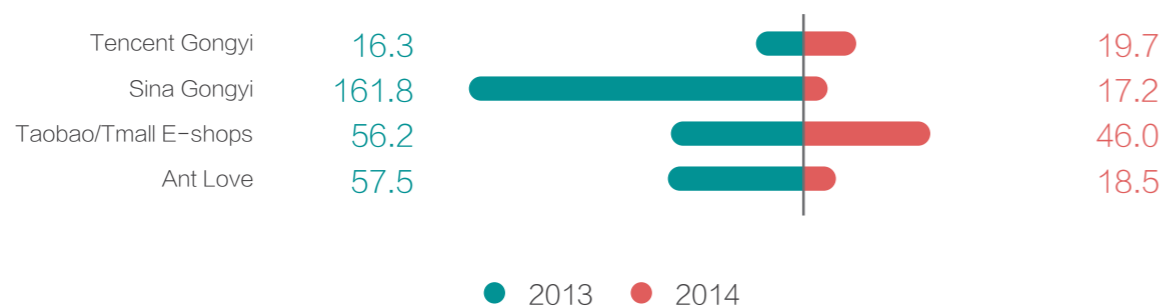
Table 7, Funds Raised by the “Big 4” Between 2013 and 2014 (10,000Yuan)



Table 8, Number of participations on the “Big 4” between 2013 and 2014 (10,000 times)²⁷



Table 9, Average amount of every fundraising on the “Big 4” between 2013 and 2014 (Yuan)²⁸



● 2013 ● 2014

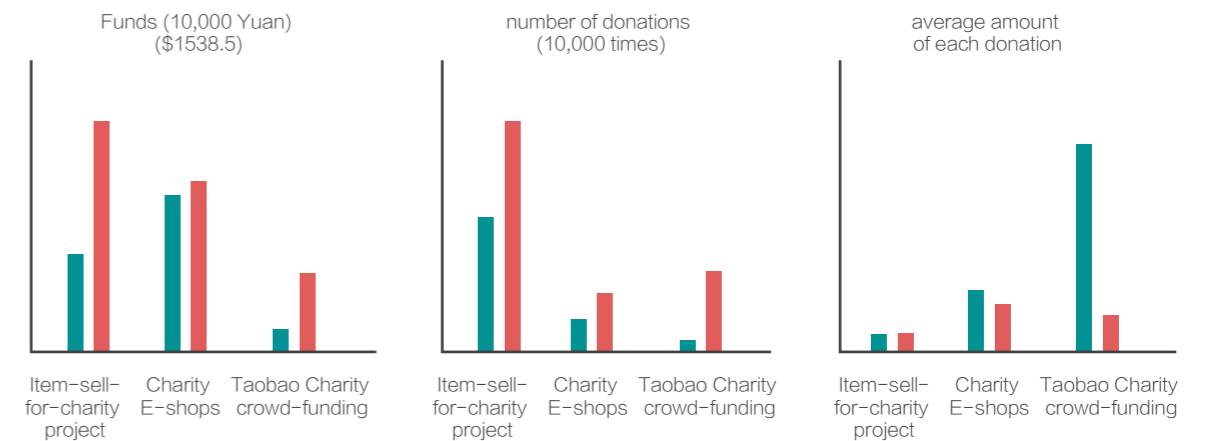
²⁶ the main reason for the growing down lies in the fact that 2013 Ya’an earthquake attracted much more donations than 2014 Ludian earthquake.
²⁷ the donation times by Item-sell-for-charity project are over 1.1 billion and were not included in this table as it will be analyzed separately below.
²⁸ same as note 25.

Tencent Gongyi, Sina Gongyi, Alibaba Group, Department of Social Responsibility and Ant Love all made their big strides in 2014 in terms of convenience, public participation and sustainability, driving forward the combination of social media and charity cause which helped charity to make its way to ordinary lives.

Item-sell-for-charity project happens seamlessly at the time when transactions take place. Sellers set up a certain percentage or a fix amount for each and every transaction in which the donation amount may be as small as one cent. Though the average amount of each donation from Item-sell-for-charity project is only 7 cents, it virtually attracted 1.1 billion times of donation, a contribution worth 72,217,000 Yuan (\$11.1million). Plus those Charity E-shops, Alibaba platform raised over 100 million Yuan (\$11.38million) with the largest donor population, the best illustration for advocating “everyone is part of charity” and “do charity whenever you can”.

Item-sell-for-charity project grew by 180% in 2014 in terms of funds amount and 150% in the number of participation, mainly due to the optimization done by Alibaba platform and the enhanced interaction among those Non-profit Organizations, buyers and sellers, which in return, gave off more transparent information about the organizations and the projects.

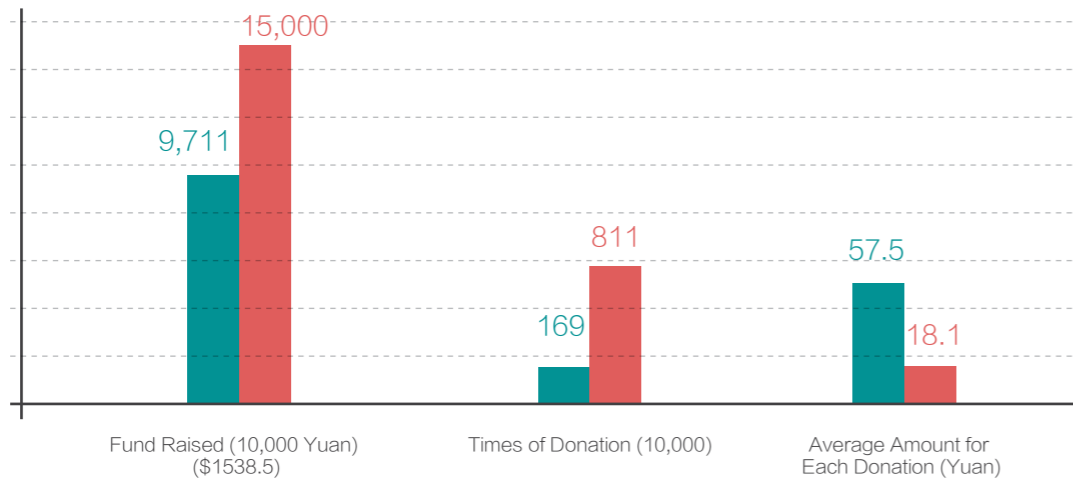
Table 10, Data Contrast between 2013 and 2014 about Alibaba Non-profit Platform



Project	Fund raised (10,000Yuan) (\$1538.5)		Times of donation (10,000)		Average amount for each donation(Yuan)	
	2013	2014	2013	2014	2013	2014
Item-sell-for-charity project	2513.8 (\$386.7)	7221.7 (\$1111)	43,000.0	110,000.0	0.06 (\$0.01)	0.07
Charity E-shops	4,685.2 (\$720.8)	5110.5 (\$786.2)	83.3	111.2	56.24 (\$8.65)	45.96
Taobao Charity crowd-funding	71.7 (\$11)	515.9 (\$79.4)	0.3	14.1	239.00 (\$36.77)	36.59
Total	7270.7 (\$1118.6)	12848.1 (\$1976.6)	43,083.6	110,125.3	0.17 (\$0.026)	0.12

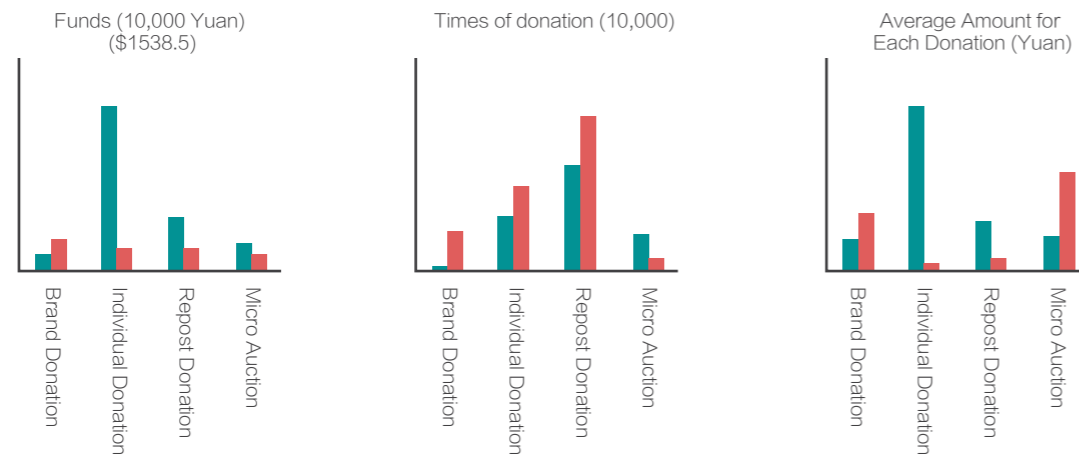
In 2014, Alipay Wallet version 8.1 gave priority to Love Donation in its Apps, facilitating Non-profit Organizations to materialize mobile operation which enables users to have quick access to donate at the home page of Alipay Wallet. It turned out to be a great success as the donation amount reached 150 million Yuan (\$23.08million) on Ant Love platform, ranking No. 1 among all big players.

Table 11, Data Contrast between 2013 and 2014 on Ant-love Platform



Compared with 2013, the fund raised on Sina Gongyi declined for two reasons: first, it was the then biggest fundraising platform with massive disaster relief projects when the disastrous earthquake hit Ya'an in 2013 which helped attract big lumps of donation for that time, occupying a big proportion of the contribution; second, as many other platforms are mushrooming, donation population has been scattered. Nevertheless, Sina Gongyi, using its advantages of being a great website, promoted a series of "experimental fundraising". One great success designed by Sina Gongyi was Ice Bucket Challenge and it further attracted many more organizations to participate in experimental fundraising activities, displaying to the public how funny Non-profit can be. For instance, China Foundation for Poverty Alleviation initiated "24 hours hunger challenge", 6 square meters' Vegetation Recovery launched "bare back challenge" and Smile Angel' advocated "Smile Challenge" etc. With all this efforts, the times of donation were increased by 61.23%.

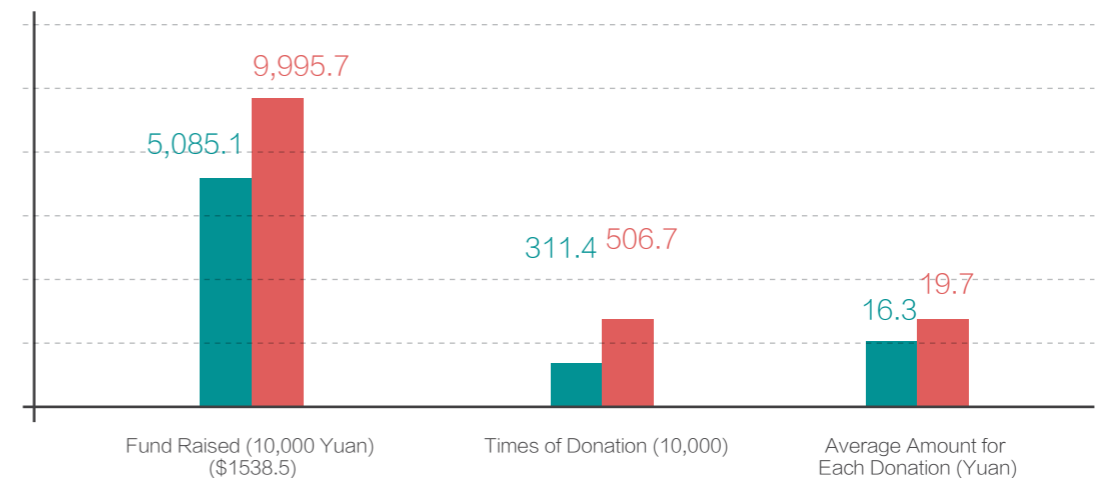
Table 12, Data Contrast on Sina Gongyi between 2013 and 2014



Project	Funds raised (10,000 Yuan) (\$1538.5)		Times of donation (10,000)		Average amount for each donation	
	2013	2014	2013	2014	2013	2014
Brand Donation	160.3 (\$24.7)	1393.1(\$214.3)	7.6	36.1	221.2 (\$3.3)	38.6 (\$5.94)
Individual Donation	26,717.5(\$4110)	2871.5(\$441.8)	51.1	84.7	522.4 (\$80.4)	33.9 (\$5.2)
Repost Donation	1,320.9 (\$203.2)	532.0 (\$81.85)	115.4	160.6	11.4 (\$1.75)	3.3 (\$0.51)
Micro Auction	51.1 (\$7.9)	32.2(\$4.95)	0.4	0.1	113.8 (\$17.5)	299.0 (\$46)
Total	28,249.8(\$4346)	4,828.8(\$742.9)	174.5	281.5	161.8 (\$24/9)	17.2 (\$2.65)

In August, 2014, Tencent brought into being "Donate together", a fresh charity lobbying mode based on social media links which immediately made a sensation in Non-profit circle and became the first option for many Non-profit Organizations. Many public figures have since joined the lobbying. Funds raised on Tencent platform rose by 96.57%, close to 100 million Yuan (\$15.38million) in over 5 million donations.

Table 13, Data Contrast between 2013 and 2014 on Tencent Platform²⁹



All in all, many efforts have been made in 2014 by key third party online players for improving fundraising access and encouraging public participation. With salient features, such efforts made panoramic display of their own unique operation way as commercial platforms. Among many, Alibaba Foundation fared rather well with its colossal e-business resources in optimizing Item-sell-for-charity project, which helped achieve better interaction within sellers, consumers and Non-profit Organizations. In 2014 alone, Item-sell-for-charity project managed over 1.1 billion donations. Ant Love, another donation platform, put Love Donation on its Fortune portal, advocating donation as a way of enjoying wealth and gave Ant Love first priority in all its Apps, which siphoned torrential net traffic for fundraising, distinctively successful. In the same 2014, Sina Gongyi strengthened its weibo platform as a even more socialized media tool, focusing more on using star resources to disseminate its appeals thus to enhance multilateral cooperation between media, enterprises and Non-profit Organizations while in the meantime, broadening the impact reach of Non-profit bodies. Tencent Gongyi, with WeChat, the giant social App standing behind, launched Donate-Together, one of the best fundraising lobbying tools based on friending social networks.

²⁹ from "Report on Tencent Corporate Social Responsibility, 2013-2014".

ii, Analysis on Participants of China's Key Third Party Online Fundraising Platforms in 2014

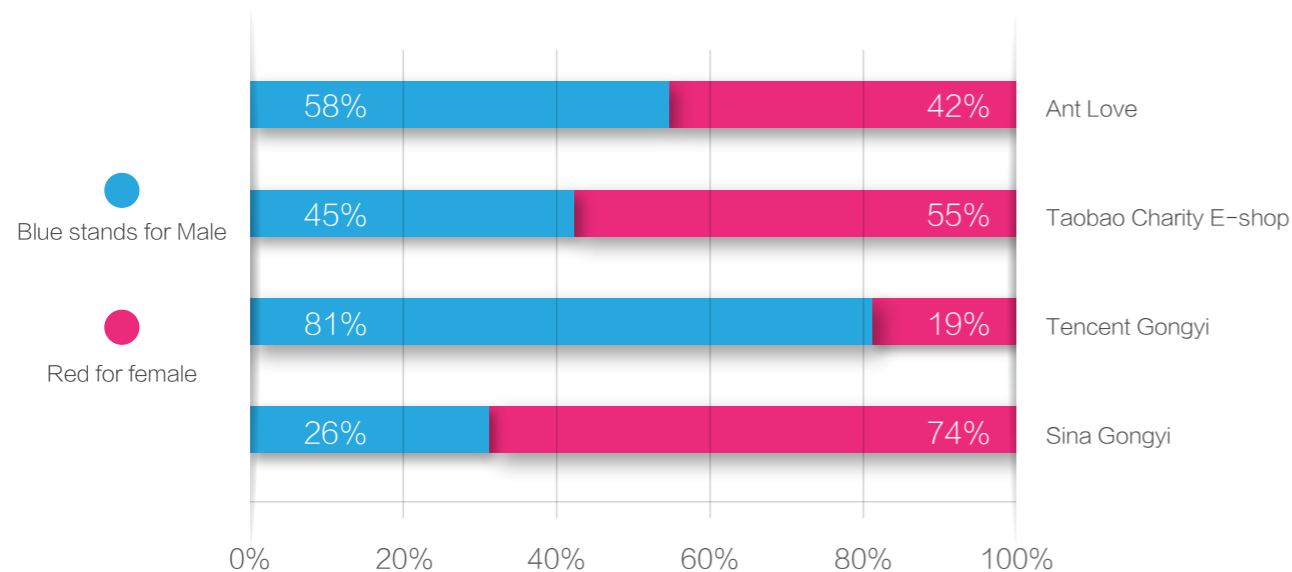
In this chapter, analysis has been made on the attributes of the donors in terms of gender, area, age, educational background etc., and on the preference of the donors through several dimensions like average donation amount distribution, project types and charity fields. It is also a rationalized understanding of how non-profit Organizations are performing on either Sina Gongyi, or Tencent Gongyi, or Ant Love or Charity E-shops.

(I) Donation Habits and Preference.

● 1, Attribute No.1 of the Donors: Gender

Generally speaking, with combined analysis on all platforms, 2014 has seen male than female donors and separate figures show that Tencent Gongyi and Ant Love had more male donors while female donors exceeded male donors on Sina Gongyi and Taobao E-shops.

Table 14, Gender Preference on Key Third Party Online Donation Platforms in China³⁰



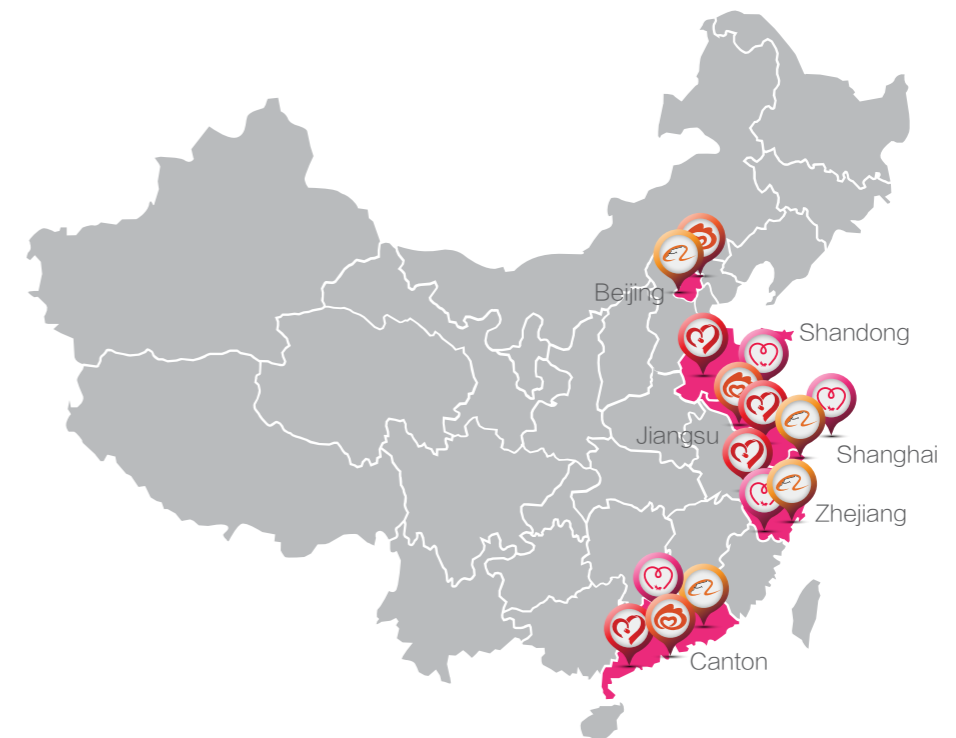
³⁰ Data for Tencent are from "Tencent Charity Big Data", <http://gongyi.qq.com/a/20140928/034429.htm>.

● 2, Attribute No. 2 of the Donors: Area

Cantonese donors contributed to the largest share of all the donations as well as having an overwhelming figure in each specific platform as statistics show.

Table 15, Area Variation on Key Third Party Online Fundraising Platforms in China

Sina Gongyi :	Taobao Charity E-shop	Tencent Gongyi	Ant Love
Guangdong 11.6%	Guangdong 23.16%	Guangdong 14%	Guangdong 10.09%
Other areas: 10.00%	Beijing 9.36%	Jiangsu 8%	Henan 7.28%
Beijing 9.40%	Shanghai 8.55%	Zhejiang 7%	Jiangsu 7.12%

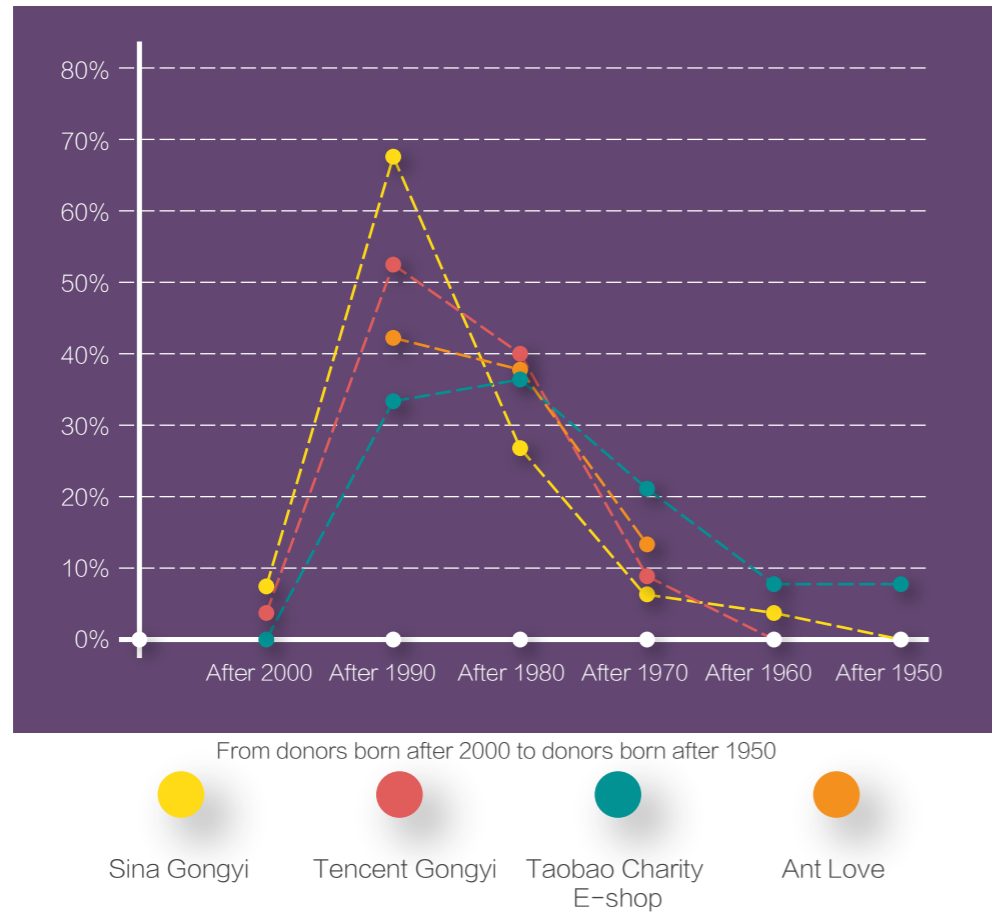


Combined statistics about the area distribution of donors show that in developed southern cities like Guangdong, Shanghai, Jiangsu and Zhejiang, residents have much stronger awareness of doing donations with Cantonese being the predominant example. Apart from these southerners, residents in Beijing and Shandong also have higher frequency in donating on third party platforms.

3, Attribute No. 3 of the donors: age

Statistics from Sina Gongyi, Ant Love and Tencent Gongyi show that youngsters in their 20s and 30s are the mainstays in donation cause, accounting for 60–70% in each of all the channels and those in their 20s is the majority of the young donors.

Table 16, Age Variation on Key Third Party Online Fundraising Platforms in China³¹



4, Attribute No. 4 of the donors: educational background

Except those did not mention their background, the statistics on Sina Gongyi platform show that the majority, about 36.8% of the donors have a bachelor degree or above while big data from Tencent Gongyi is giving a picture of the majority 40% of donors holding a senior high school certificate.

5, Single Donation Amount

Statistics from Sina Gongyi, Taobao Charity E-shops and Ant Love Platforms show that in most cases, the amount of each donation is between 0–10 Yuan, and in the wake of it, 11–30 Yuan (\$1.7–4.6).

However, the amount for each donation ranging mainly between 0–10 Yuan can be ascribed to the guidance design on the platforms. With the only exception on Taobao Charity E-shops that Non-profit Organizations can make price for their products at discretion, all the other platforms do not give free authority on pricing. For example, a no-more-than 20-Yuan (\$3.1) cap for each single donation was set up by Sina Gongyi platform as well as Ant Love (who gives a 20 Yuan (\$3.1) cap on mobile portal and only 5 Yuan (\$0.7) cap on PC end). By analyzing the statistics from Tencent Gongyi, it is suggested that when the cap limit was lifted to 20 Yuan (\$3.1) from 10 Yuan (\$1.5), the average donation amount bumped up to 36 Yuan (\$5.5) from 17.6 Yuan (\$2.7).³²

Table 17, Amount Variation for Each Donation on Key Third Party Online Platforms in China

Amount for Each Donation	Sina Gongyi	Taobao Charity E-shop	Ant Love
0–10 Yuan (\$0–1.5)	80.21%	92.79%	77%
11–30 Yuan (\$1.7–\$4.6)	6.26%	4.23%	23%
31–50 Yuan (\$4.8–\$7.7)	5.23%	1.57%	
51–100 Yuan (\$7.8–\$15.4)	6.12%	0.80%	
101–200 Yuan (\$15.5–\$30.8)	2.18%	0.39%	
Above 200 Yuan (>\$30.8)	–	0.22%	

6, Donation Frequency

Estimated statistics show that 3.476 million users on Ant Financial and Sina Gongyi platforms have cultivated an intermittent donating habit with a record of at least 2 donations. Data from Taobao Charity E-shops, Ant Love and Sina Gongyi indicate that donors with twice or more donations have a share of 18.85%, 30% and 37.06% respectively. Sina Gongyi made a largest record for high frequency donors.

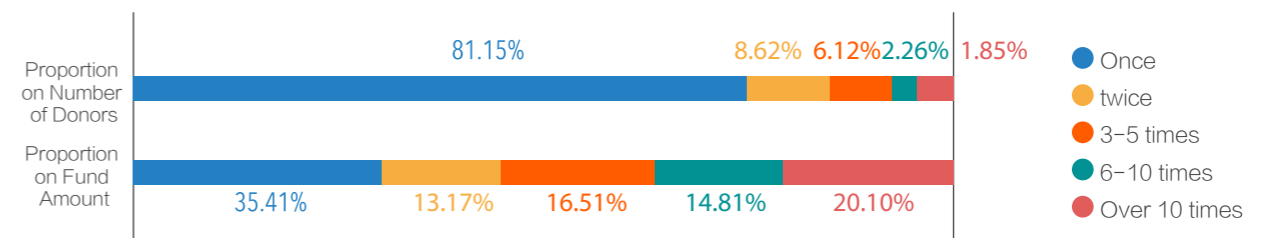
Table 18, Donation Frequency Variation for Key Third Party Online Fundraising Platforms in China

Donation Times	Once	Twice	3–5 times	6–10 times	Over 10 times
Taobao Charity E-shops	81.15%	8.62%	6.12%	2.26%	1.85%
Ant Love	70%	30%			
Sina Gongyi Donation Frequency	Once	Twice	3 times	4 times	Over 5 times
	62.94%	13.13%	6.02%	3.30%	14.58%

By cross contrast of the numbers of the donors and funds raised on Taobao E-shops in various donation frequencies, the results show that one-off donors amount to 81.15% of the total number, and contributed 35.41% to the total funds raised, an indication that new donors are of great importance in both terms of participation and fund amount.

Regular donors, though cover a small proportion of the total donor population, are more willing and at same time, financially strong to donate. They made relatively higher contribution, worth focal attention and energy of the Non-profit Organizations. On Taobao E-shops, regular donors with a frequency of 6–10 times and above 10 times account for only 2.26% and 1.85%, but made much bigger contributions in terms of fund amount, about 14.81% and 20.1% respectively.

Table 19, Proportion about Number of Donors and Fund Amount in Various Frequencies on Taobao E-shops



³¹ statistics from Tencent Gongyi platform is different from the other Big 3, and here cited are approximate figures.
³² from Tencent Charity Big Data, <http://gongyi.qq.com/a/20140926/034429.htm>.

7, Donation Preference for Charity Field

Statistics from Sina Gongyi show that medical-aid-related projects are most attractive with both higher total donation amount and higher frequency, accounting for 66.2% and 70.6% respectively of the total figures of the Sina Gongyi platforms in China while animal protection projects enjoy the highest average single donation amount, up to 133.2 Yuan (\$20.5). Figures from Alibaba Charity E-shops show that funds for helping the vulnerable occupy a 34.6% share, higher than for aiding the ill and disaster victims. The largest share, in terms of the number of participants, as it shows, goes to education-aiding, around 38.1%, higher than the number for aiding the ill and disaster sufferers which is 37.4%.

Table 20, Preference for Non-profit Field on Sina Gongyi Platform

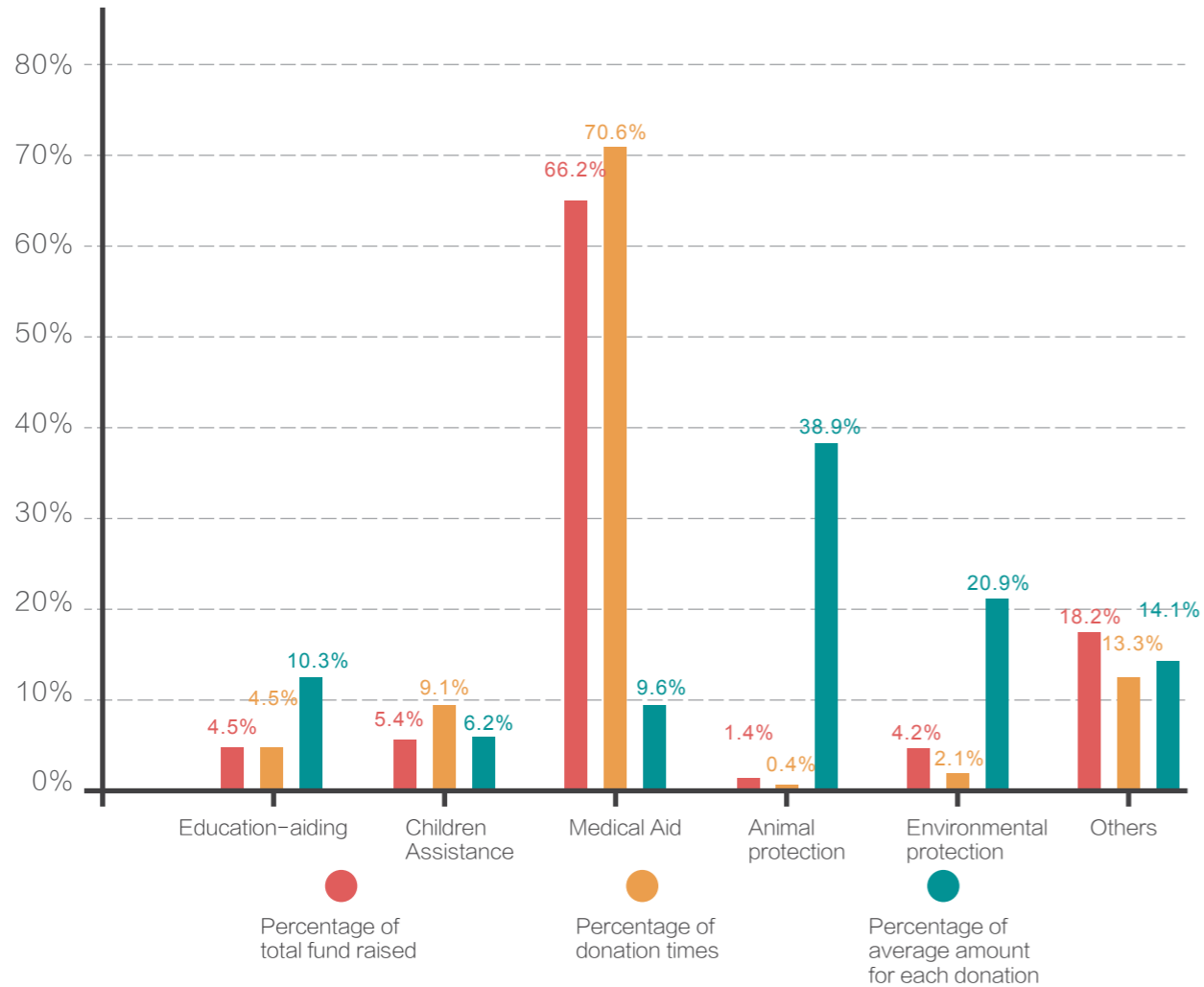
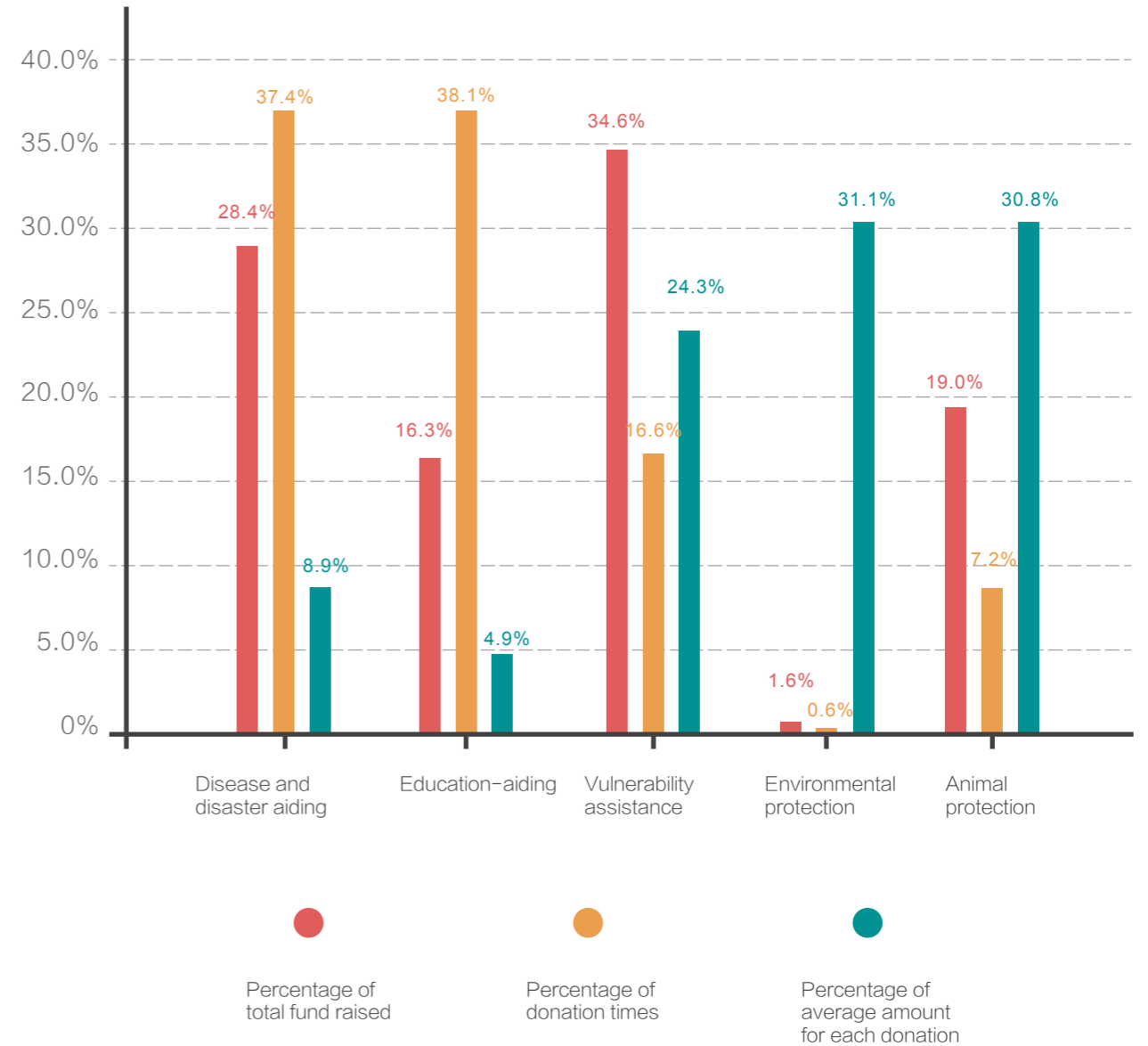


Table 21, Preference for Non-profit Field on Charity E-shops



Cross analysis on the said two platforms regarding total fund amount and donation times indicates that on these two platforms, though environmental protection and animal protection attracted less fund and less donors, the average amount for each donation is relatively higher, an illustration that in spite of being unpopular, the supporters on these topics have stronger sense and better financial capacity.

8, Project Storytelling Style

Ant Love believes that positive and decent project purposes will be very helpful in attracting public participation in addition to reputable organization names, moving stories and executable project plans which are of equal importance. The head of Sina Gongyi says that by observation of various projects on Sina Gongyi, he sees more and more people are willing to follow those sound projects giving off positive energy. Similar results were released by Tencent in September 2014 on its Big Data of Tencent Gongyi as sunny and warm pictures are more motivating, that donees who are accommodating or tenacious can convey more inspiration to donors who tend to join hands with the donees to turn wishes into reality.

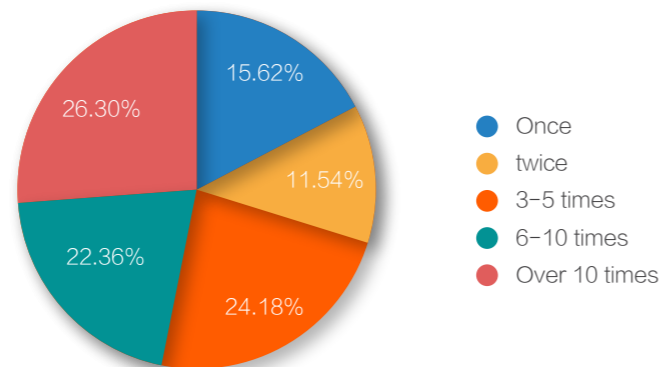
Zhongchou.com clearly stated in its Regulations on Project Launching that any project relying on feigning misery will not be accepted.

9, Characteristics and Preferences of the Buyers for Item-sell-for-charity Project on Alibaba

Taking into account of the fact that buyers mentioned above are by no means the equivalents to ordinary donors, it is therefore necessary to give a separate analysis in this chapter. From all perspectives, the features of those buyer-donors are more or less similar with the other pure donors. In gender distribution, female buyers get a slight upper hand while in age range, youngsters born in 1980s, and 1990s account for 73.8%. Similarly Cantonese win the No. 1 title in both buyer number and seller number and not surprisingly, 43.7% Items-sold-for-Non-profit are educational aiding and 32.9%, disease and disaster relieving.

The only uniqueness for Item-sell-for-charity project is the donation frequency. In 2014, 26.3% of the buyers did more than 10 times buying-donating, followed by 24.2% with 3-5 times and 22.36% with 6-10 times.

Table 22, Variation Analysis of Donation Frequency for Buyers of Item-sell-for-charity Project



From all above, donors on various channels show similarity with each other. Specifically, female donors are more active than males on Sina Gongyi, Taobao Charity E-shops, Taobao Crowd-funding platforms and are less active on Tencent Gongyi, Ant Love. Generally speaking, male donors do little more than female donors (59% to 41%).

When it comes to area, Cantonese do the most donations, followed by residents from other rather developed areas like Beijing, Shanghai, Jiangsu and Zhejiang.

In terms of age, youngsters in their 20s and 30s form the majority of the donors, around 78.3% combined. Youngsters like a lifestyle of charity more than others.

In terms of average single donation amount, 83.3% of the donors fell in the range between 0-10 Yuan (\$0-\$1.5), a result having a lot to do with the donation cap on designed by the platforms.

For another parameter-donation frequency, 74.2% of the donors only do one-off donation, however, regular donors contribute noticeably more to the total amount.

For charity field, projects for disaster relief, medical aid and vulnerable support are most popular. A highlighted charity fundraising project is always a social hotspot such as a severe earthquake or the like. 50% of the top 10 projects in terms of the amount in 2014 on Sina Gongyi were relating to Ludian (a county in Yunnan province) earthquake. It was even

more obvious in 2013 when 70% of the top 10 projects were relating to Ya' an earthquake which caused many deaths. Other hotspots like veteran care are also very inviting to public donors.

All in all, donors on key third party online fundraising platforms have much similar features with commercial users on these platforms. It is therefore suggested that non-profit Organizations do appropriate analysis for targeted donors in designing a project, thus to make it more pertinent and attractive.

(II), Performance of the Third Party Online Fundraising Platforms

NGOs were rather active on third party online fundraising platforms in 2014. Rapid growth of organizations, projects and users has been seen on Alibaba Charity E-shops and Sina Gongyi platforms. Taking Alibaba Charity E-shops and Sina Gongyi Brand Donation as examples in the following part of this report, it is expected to illustrate how those NGOs are performing in terms of online fund-raising.

51,105,000 Yuan (\$7,862,307.7) were raised by Alibaba Charity E-shops in 2014, 9.1% growth year-on-year while donors increased to 556,000, a 27.5% growth. Total donation times grew by 33.5%, up to 1,112,000 times with 132 new organizations, a 103.1% growth rate. The best performer of all these organizations is One Foundation.

Table 23, Growth between 2013 and 2014 on Alibaba Charity E-shops

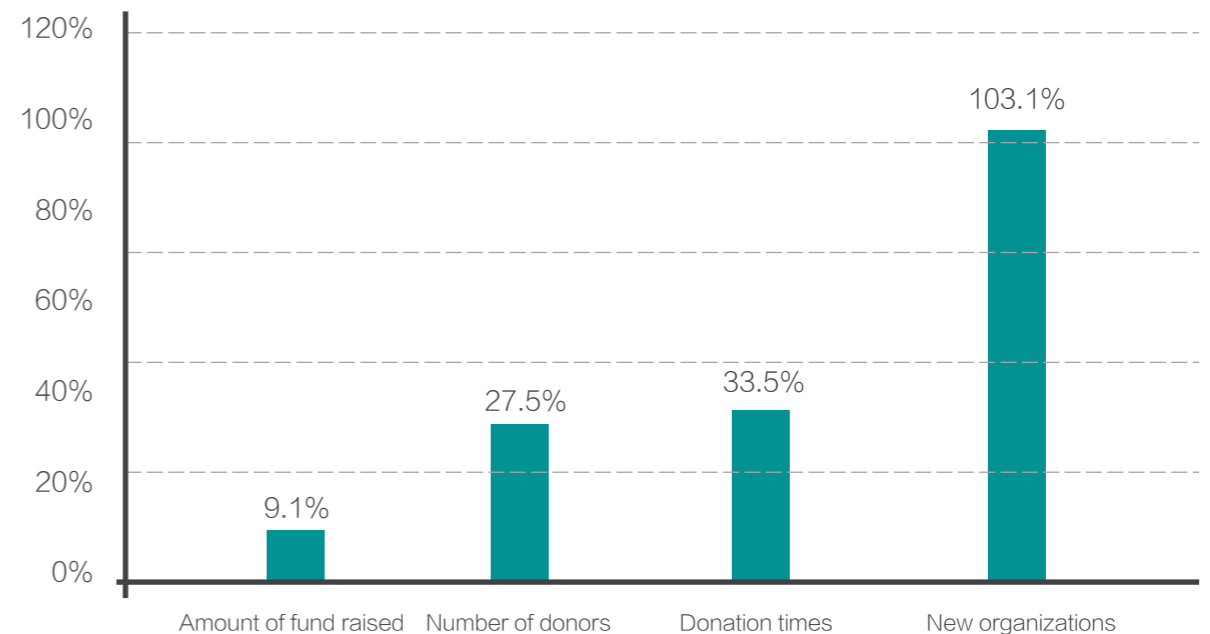


Table 24, Development of Alibaba Charity E-shops between 2013 and 2014

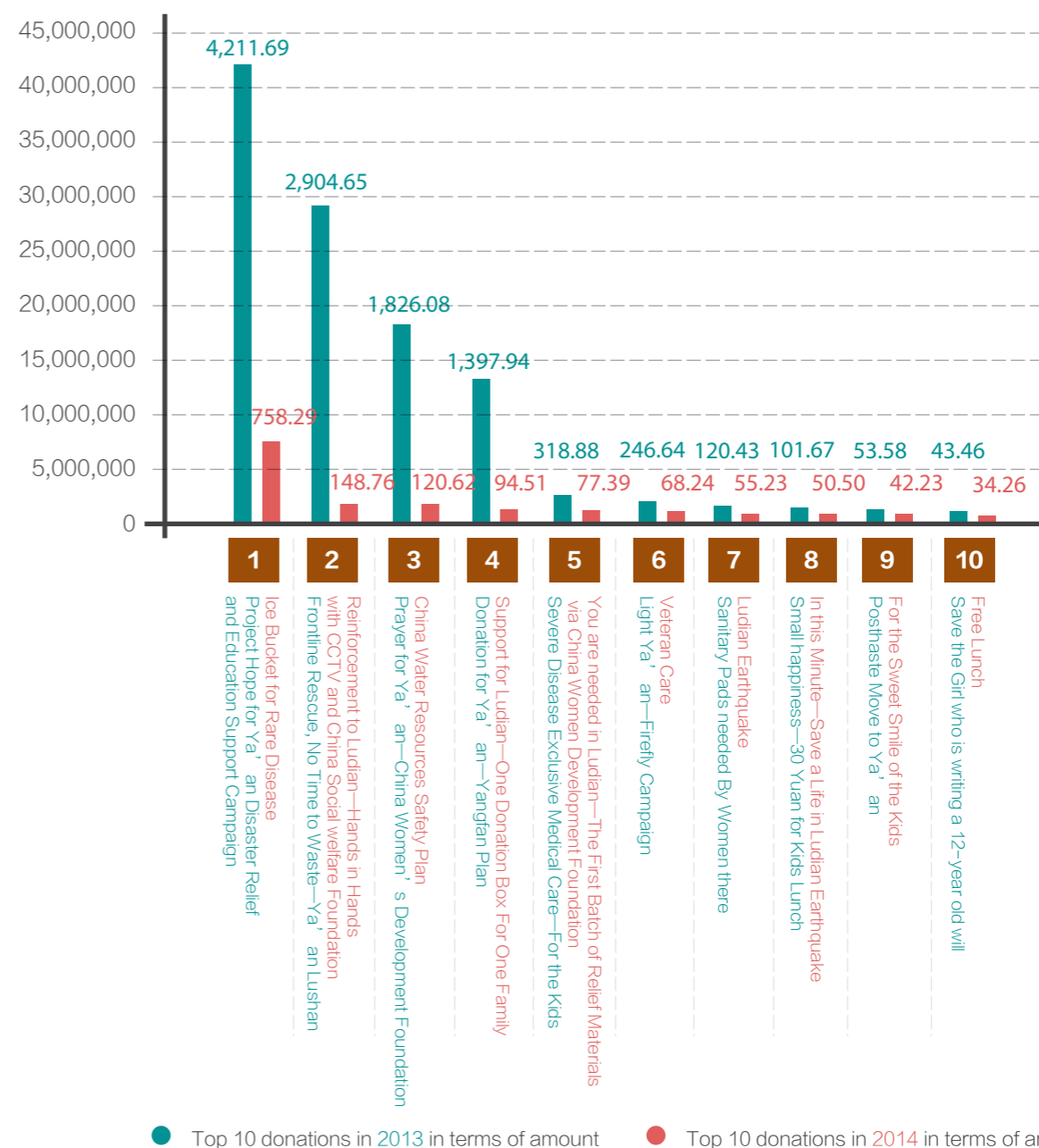
Year	Amount (10,000 Yuan) (\$1538)	Number of Donors (10,000)	Donation times (10,000)	New organizations
2013	4685.2 (\$720.8)	43.6	83.3	65
2014	5110.5 (\$786.2)	55.6	111.2	132
Growth rate	9.1%	27.5%	33.5%	103.1%

Table 25, Top 10 Alibaba Charity E-shops in Terms of Fund Amount

1	Shenzhen One Foundation
2	China Foundation for Poverty Alleviation
3	China Social Welfare Foundation (Free Lunch)
4	Shenzhen Longyue Charity Foundation
5	Yunnan Youth Development Foundation
6	Jinhua Charity Federation Shilehui Branch
7	The Amity Foundation
8	The China office of UNICEF
9	Chengdu Home of Love for Animals
10	Buy42.com

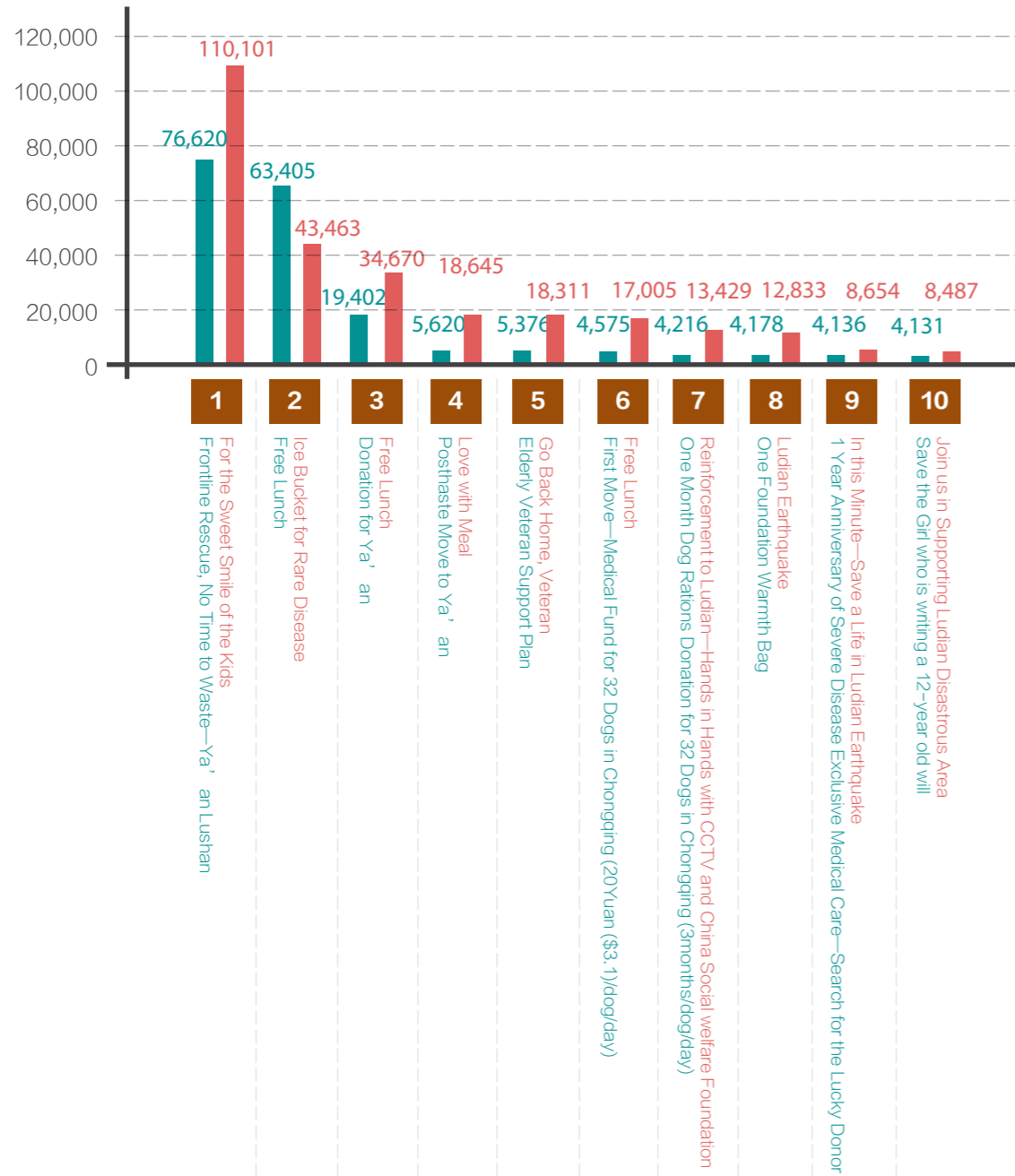
In September, 2013, Sina Gongyi set up its Brand Donation program which grew rapidly in 2014, with 112 projects and 13,930,999 Yuan (\$2,143,230.6) in 360,585 donations by 201,815 donors. The project launched by China Dolls Rare Disease Care Center—Ice Bucket for Rare Disease raised the largest amount of Charity fund on Sina Gongyi in 2014. Though on a free ride of the worldwide fad of Ice Bucket Challenge, China Dolls did succeed by its good reputation, creditability and propaganda which they deserved ever since 2008 as they set store by social community work and publicizing.

Table 26, Top 10 Donations on Sina Gongyi Platforms in 2013 / 2014 (by 10, 000 Yuan) (\$1538.5)



In 2013, Sina Gongyi raised over 280 million Yuan (\$43.1million) mainly due to the excellent effect achieved through the disaster relief projects for 'Ya' an area. 8 out of the top 10 donation projects were relevant to disaster relief in which Project Hope for 'Ya' an Disaster Relief and Education Support Campaign raised an amount of over 40 million Yuan (\$6.2million). The No. 1 project in 2014, Ice Bucket for Rare Disease, raised 7.58 million Yuan (\$1.2million), having a big gap to the front runners in 2013. However compared with 2013, the top 10 projects in 2014 were more diversified, covering Severe Disease Medical Care, Disaster Relief, Environmental protection, Veteran Care, Poverty Alleviation etc. with wider Non-profit range of donors.

Table 27, Top 10 Donations in Terms of Times on Sina Gongyi in 2013/2014 (Times)



From the above table, it is clear that though there is a huge gap between the funds raised in 2013 and 2014 on Sina Gongyi, there is not too much dropping in donations times. It is learned that many enterprises contributed large sums during Ya'an earthquake, probably the reason why the platform fared beautifully in 2013 as the participation for Ludian earthquake was comparatively low in 2014, which may be due to the different degree of the destruction or due to the development of other platforms leading to diverting of donors.

III, Overview of Typical Cases on Third Party Online Fundraising Platforms

(I), A Splendid P2P Tool—Donate Together

Ever since Tencent Gongyi launched Donate Together in August, 2014, it exerts a significant influence on the ways of domestic public fundraising. The main mode that Donate Together employs is P2P (Peer to Peer) on which a participant is at the same time a fundraiser. It mobilizes the participants to lobby an idea within their friend cycles. While at the beginning, P2P functions as a tool for person to person, face to face encouragement or small social party dissemination, it gradually takes on network forms via email or social apps with the development of the technology. Donate Together is pretty convenient, making it possible for sponsors to send links to friends through a single point, lobby in WeChat groups or lobby freely offline at dinner tables. Besides, based on WeChat, the giant social media platform, Donate Together enjoys a higher participation rate in that participants may transfer the information to others or post to friend cycles, better driving the initiative of the public. As how Donate Together works now, it mainly is used for project, sporting and experiential fundraising.

Among all, project fundraising is most commonly seen as most Non-profit Organizations may use Donate Together to spread the project information to friend groups. A sponsor of a project can be a organization or a donor, volunteer, supporter or partner of the project, an embodiment of his/her recognition of the organization and the project and thus giving endorsement to the organization and the project, encouraging and ensuring his/her friends to participate. It is a simple process, at low cost, requiring nothing but to launch the project online and mobilize the existing donors, volunteers, supporters or partners to spread the information within their own friend cycles, however, it has its disadvantage as the participation and raising results rely heavily on the project reputation and mobilization capacity.

Sporting and experiential types of fundraising are more typical P2P modes, mainly attracting the interests of the public by self-challenging or through funny illustrations and thus mobilizing the participants to advocate or lobby others to join. Compared with project fundraising, such ways are more interesting than significant, and therefore more pertinent to public's expectation.

In 2014, China Foundation for Poverty Alleviation launched its first 100km Walk Charity when Donate Together came into being, through which Walk Charity called its participants to raise fund and managed 677 donations, worth 202,142.47 Yuan (\$31,098.8), 11.57% of the total fund it raised. 2,864 times of donation were done on Donate Together, covering 31.47% of the total donation times. In spite of the fact that Donate was very new and strange to users, and the committee missed an opportunity to have a bucket meeting for mobilization, it is still quite a success in such a short period of time.

In combination, Donate Together fits very well with P2P fundraising modes typified by sporting and experiential modes in that whenever a sponsor kicks off a fundraising initiative, he makes himself a center (a result of decentralization) from which he can spread the project or the organization information to his friend cycle for further dissemination while P2P modes can help gain value added proponents for organizations. Sponsors may achieve much bigger success in his/her social community than what organizations can achieve on their own. A Firstgiving Survey³³ observes that the average amount a sponsor can raise is 10 times that of ordinary donor. Compared with equivalent international tools that enable one to setup his own fundraising home page, upload pictures and videos, however, Donate Together lags behind in addition to the shortcoming that such Donate Together initiatives cannot be shared on Microblog or the like, hampering a better result to some degrees.

³³ Firstgiving website: emas.openxmlformats.org/drawingml/2006/chartsingstgiving, emas.openxmlformats.org/drawingml/.

(II) Experiential Fundraising Mode Urges Universal Sense of Charity—Ice Bucket Challenge Supported by Sina Gongyi

Experiential fundraising practice abandoned the old clichés of begging stories but encourages the participants to feel how the beneficiary will feel or what ideals organizations will hold thus to persuade them to lobby and advocate the values. It gradually came into vogue after 2011 and the Ice Bucket Challenge fermenting over Sina Gongyi platform in 2014 was a great success, driving experiential fundraising further and further as more and more organizations are joining the club.

Since the summer of 2013, people in the north of the US somehow began to take to Cold Water Challenge in which a participant can choose to jump into cold water or donate a sum of money to some cancer research institute. It is where the worldwide fad of Ice Bucket Challenge originated. When Chris Kennedy, a professional golfer accepted the challenge, it gradually shifted its focus to amyotrophic lateral sclerosis (ALS, also known as Lou Gehrig's Diseases). Participants are asked to pour a bucket of cold water on head to feel the pain ALS patients are suffering and are also requested to upload a video to social media while nominating 3 friends to participate in the challenge. The nominated friends must accept the challenge within 24 hours or donate \$100 to ALS Association.

On August 18th, 2014, Lei Jun, the head of Xiaomi Inc, one of China's largest technology companies accepted the challenge from Mr. Yuri Milner, the CEO of DST Global and his wife, making himself the first Chinese man to accept the challenge. When being informed of the event, Sina Gongyi joined hands with China Dolls Rare Disease Center for a campaign named Ice Bucket for Rare Disease and the on-fire Ice Bucket spread to China where the challengers observed the international rules but the beneficiary organization was shifted to China Dolls Rare Disease Care Center. The campaign lasted for nearly 2 weeks.

It made a sensation with up to 4.7 billion clicks on the topic, 4,094,000 discussions and 8 million blog articles³⁴. By employing the viral mode of nomination, the campaign proliferated between nominators and nominees rapidly, particularly when nearly 300 superstars joined, awareness of ALS was massively spread. The circulation of Ice Bucket Challenge gave full expression to multilateral connectivity not only within new media, but also with government, and traditional media, a terrific drive for nationwide promotion of charity.

By 24:00 o'clock of 30th, August 2014, around 40,000 donors made their contribution to the exclusive project that Ice Bucket Challenge campaign was appealing. A total sum of 8,146,258.19 Yuan (\$1,253,270.5) has been raised both online and offline, in which about 6.6 million Yuan was given by ordinary netizens, accounting for 81% of the total³⁵.

More and more NGOs are hoping to launch a sensational experiential fundraising activity. Though it is hard to copy what Ice Bucket Challenge has miraculously made, the following successes are worth learning:

1, Those Sponsors Cherish the Build-up of Good Brand Reputation, and Are Quick to Response

When informed of Lei Jun's acceptance of the challenge, the head of Sina Gongyi wasted no time in calling three domestic organizations who deal with ALS, hoping to get the most effective one to take charge of the cooperation and implementation of the Chinese version of Ice Bucket Challenge. At the very night, China Dolls Rare Disease Care Center made the first dash with swift work specialization and launching scheme. China Dolls gained pretty decent brand reputation and credibility ever since 2008 as they dedicate a lot to social group connection and public propaganda and was thus recognized by Lei Jun when Sina Gongyi recommended it as the final partner.

2, They Have Clear-cut Rules and Convenient Donation Access

Rules were established at the beginning. Uniform template was given in Microblog and in 140 words, the main information about the nominee's acceptance of the challenge and who will be the next nominee was neatly put with a donation link at the end to make sure entertainment would not cast complete shadow on charity. They took Lei Jun's acceptance as the best opportunity of establishing the rules which was observed by all the other celebrities and made sure that public would not overlook the donation link. Compared with how Ice Bucket Challenge was circulated on facebook, Weibo combines the functions of publicizing and fundraising by offering "1 share=100 Yuan (\$15.4)" micro brand donation program through which the viewers may conveniently click the donation link.

3, Not Only Meaningful, But Thrilling

The success of Ice Bucket Challenge shows that NGOs does not necessarily mean miserable begging for attention. A bucket of cold water makes public feel fresh and thrilling and conscientiously experience how the beneficiary of the donation may feel thus to motivate their charity participation. Over 40% of the users on Sina Microblog were born after 1990 and care not only meaningful but seriously interesting things. Statistics released by Sina Gongyi for the 3rd anniversary donation report show that 44% of the donors were born after 1990³⁶. Therefore, how to accustom to these youngsters is the first priority question for Non-profit Organizations when designing experiential fundraising programs.

4, Fans Charity

Celebrity charm plays a key role in raising fund and initiating Ice Bucket Challenge. On 22nd of August, up to 790 million people browsed online for Ice Bucket Challenge with 8,800 real donors, a single day record which had a lot to do with densely participation of celebrities in the challenge on 20th and 21st of August when Wang Sicong, TFBOYS, Liu Jishou, Wu YueTian Band and other super stars made their splendid challenge performance online. Wang Sicong, a famous Micro blogger donated 1 million Yuan (\$150,000) and was followed by over 2500 of his fans. The iconic adolescent band, TFBOYS had their filmed challenge reposted over 100,000 times within 8 hours and reached 42 million times in 5 days. It is therefore a rather recommended channel for organizations having good star resource to utilize the celebrity charm for better Non-profit participation, and for those without direct star resources, to contact fan bases for down-up participation approach.

5, Perfect Integration of Fundraising and Propaganda

With Ice Bucket Challenge, huge amounts of funds were raised in unison with the great success of lobbying ideas. By establishing rules and through celebrities' introduction about ALS in their videos like those done by Jay Chou and Gem Tang, 2 famous singers to induce public awareness, the knowledge about ALS was miraculously spread and circulated during the experiential fundraising practice to an extent to which the medical world or ALS service organizations can never reach.

Participants in experiential fundraising programs can have deeper understanding and fuller recognition of the ideas the organizations are carrying than ordinary donors and are more likely to tell their friends or family members what missions or purposes the organizations are working on, what they themselves have felt about the activities, expanding the exposure of the ideas. Experiential fundraising can help organizations extend the donors list, win higher value-added supporters, build long-term reputation and obtain public trust.

³⁴ From Sina Gongyi
³⁵ "About 2014-Review on Ice Bucket Challenge in China by China Dolls. http://blog.sina.com.cn/s/blog_532b6a210121vmd.html

³⁶ from "The 3rd anniversary of Gongyi program, Love is Cute". <http://gongyi.weibo.com/thirdyear?from=inglemessage&isappinstate=0>

(III), Mobile Internet is Changing Monthly Donors —One Foundation Monthly Donation on Ant Love Platform

The idea of monthly donation originated from UK in 1960s when OXFAM promoted donation commitment idea and developed rapidly through Europe in 1990s. The idea was first adopted in the mainland of by China Foundation for Poverty Alleviation in 2006. After 2009, more and more Non-profit Organizations began to realize the value of monthly donation and started to give weight to it. It is still so new an approach for Chinese that it is still struggling for acceptance. It also requires automatic deduction by banks from donation accounts, which makes it even harder to be effectively promoted as most organizations have limited access to such services due to bank systems. Currently, major third party online monthly donation platforms include Tencent Monthly platform, Ant Love and CMBC's Yuejuan Yueduo platform. Compared with all other players now in China, the monthly donation program by One Foundation has made the most salient performance in terms of number of donors and fund amount.

One Foundation started its monthly donation program in 2008. At first, it joined hands with CMBC and Tencent in lobbying "1 Yuan (\$0.15) 1 Day from 1 Donor" program before launching online monthly donation program and Love Heart credit card & All-purpose Love Heart card monthly donation. In 2011, by cooperating with UnionPay, One Foundation completed an innovative monthly donation access for UnionPay users and in 2013, with Alipay, it launched its mobile monthly donation program which came online of CMBC's Yuejuan Yueduo platform. By 2014, One Foundation has 4 main monthly donation channels: Ant Love, Tencent Gongyi, CMBC's Love Heart Cards (debit card and credit card) and Unionpay. Besides, the official Charity E-shops of One Foundation on Tmall also have donation access through which netizens can make monthly donations at their own discretion. The total amount of monthly donations raised by One Foundation exceeded 26 million Yuan (\$4million), 16% of all donations raised or 24% of not-for-severe-disasters donations. The majority monthly donors for One Foundation are using Ant Love and Tencent Gongyi platforms, distinctively different from other countries' donors who mainly use offline methods such as street lobbying, door to door promotion, telephone or emails which cost more. Thanks to the development of mobile internet in China, One Foundation has achieved outstanding fundraising results on third party online platforms which become the most popular platform for donors for One Foundation. This, to a great extent, reduces the cost and enlarges the potential donor base.

A Near-100, 000-monthly-donor Phenomena on Ant Love is Attributable to 6 Advantages

1, Huge Network Stream with Platform Advantages

In October, 2014, 190 million effective users are using Alipay. This figure grew to over 270 million in April, 2015 with 80 million new users. Non-profit interface is put at the home page of Alipay wallet which gives always the first impression to a user and is very helpful in gaining new donors.

2, Strong Support to the Donation System of One Foundation from Ant Love Platform

To start with, Ant Love recognizes users on One Foundation and supports systematic connection of user data and donation data which are of great importance to Non-profit Organizations for developing, securing and maintaining key donors. On one hand, One Foundation can make the best use of its donation service system in service design, data collection, etc. as well as providing interactive feedback on product life cycle with monthly donors, on the other, with the help of the service window by Alipay Wallet, One Foundation can provide direct feedback service to donors on its own platform.

3, Elaborate Design of the Monthly Donation Products of One Foundation

The default amount of every donation is as designed 1 Yuan (\$0.15) every day, namely, 30 Yuan (\$4.6) every month, which is a rather low threshold affordable to working class and even students, thus a great thrust to promote public participation. They use picturesque vernaculars that fit well to the taste of donors as most of the monthly donors for One Foundation via Alipay are ordinary Joes but are quite capable of doing 1 Yuan (\$0.15) 1 Day donation.

4, Brilliant Brand Images

Most monthly donation programs are rather different from the nonrestrictive practice commonly seen in other countries but are always packaged into a restrictive donation for a certain project while Alipay Wallet monthly donation is restrictive, and its capacity of attracting big donors with over-million-Yuan (\$0.15million) single donations has a lot to do with its brilliant brand image.

5, Convenience

Compared with other monthly donation channels, Alipay Wallet has very simple and streamlined process for monthly donors, saving all necessary registration, login, page turn or long queue in bank for offline fill-in that may be required in an official website. As long as a day cap is given and made default, everything is done. Compared to a bank counter or PC terminal, it has no such limitation as to a particular place and makes donation a hands-down matter.

6, Resources Investment from Organizations

One foundation has a full time staff dedicated to the routine coordination with Ant Love and Alibaba Gongyi and provides an internship vacancy for necessary supporting works as may be required. Considering the importance of Alibaba Platform as a whole for One Foundation's fundraising strategy, the directors and the head of the platform have virtually put a lot of efforts in Ant Love monthly donation works. Meanwhile, the service function of One Foundation has dedicated staff exclusively for helping donors as they regard the service for the donors are the core of all businesses. In 2015, the number of monthly donors and donation amount keep going up on Ant Love platform which has become one of the key channels for One Foundation in terms of monthly donation. As its data are open, it is the most sustainable monthly donation channel in the future with great potentiality.

Though the third party online donation platforms have the capacity of broadening monthly donors' base in a pretty short period of time without incurring any building cost and maintenance expenses, they lack direct access to analyzing the donors and thus providing direct service as they are out of reach of the details of the donors. This exerts relatively larger effect on sustaining loyal donors that match their product life cycle

Besides, third parties have more restrictions and may set up certain requirements for monthly donation projects and the development of the platforms is subject to commercial elements, therefore, with the trend in which monthly donation begin to grow in the wake of mobile internet, organizations are expected to build their own monthly donation channels in addition to third party platforms.

(IV), Embracing the Era of Online Charity—A trial Undertaken by China Foundation of Poverty Alleviation (CFPA)

CFPA defined 2014 as a Year of Mobile Internet to give highlighted expression of close consensus of top brass in the Foundation on the trends of mobile internet. In 2014, CFPA pushed hard from top down in mobilizing and acted progressively from the ground to high level as even chairman and general secretary worked out various initiatives to lead and advocate participation of all staff. With innovative plans standing behind, CFPA carried out necessary performance evaluation, internal and external training as well as information sharing to strengthen the awareness, which all together boosted the operational capacity of the organization. One highlight is the New Media Panel, a cross-function creature comprising General Secretary, heads of propaganda, fundraising and project plus task-oriented workers who respectively lead the work in line with a rotary accountability system.

By exploring and experimenting the whole year, CFPA achieved fruitful outcomes in this new arena of mobile internet with its fans jetting up to 150,000 from 10,000 on CFPA WeChat Public Account, 30,000-odd fans on weita.com and nearly 40,000 fans on the service window of Ant Love Platform. At the same time, with the support of Alibaba, Tencent and Sina Gongyi, over 55 million Yuan (\$8.5million) contribution was made to CFPA via internet platforms.

CFPA Set much store by new media for public attention and donation as shown by a striking contrast between 2013 at Ya' an earthquake during which CFAP was attracting public funds via traditional press conferences, newsletters on alliance media and the like and in 2014, however, when Ludian earthquake broke out, CFAP enforced its operation via We Media, pushing new media going up with a good momentum. It raised over 10 million Yuan combined, in which up to 79% was from mobile terminal users while in 2013 Ya' an earthquake, the figure was merely 27%.

The Success of CFPA on Mobile Internet Can Be Attributed to the Following Points:

1, Strategic Consensus Among Management Team

Mobile internet is definitely the future of the industry, the orientation of CFPA, the consensus of the leader team. Researches and practice led by such recognition can draw strong support, which enables and facilitates the implementation of concrete and specific works, pushing the cause move forward.

2, Guarantee by System and Continuous Investment

A series of systems and measures regarding how to integrate mobile internet with pragmatic undertakings have been set up by CFPA, and at any case when a specific project is underway, it is mingled with the sense of mobile internet. And between projects, interconnection and mutual support is seen in their operations and information transmission, thus with amplified results.

3, Diversification

The rapid development and changes of mobile internet are urging third party online fundraising platforms to evolve. CFPA has always been leading the tide with various new tools for new and innovative fundraising channels. On 17th October, 2014, CFPA joined hands with Sina Gongyi in initiating “24 hours hunger” experiential fundraising campaign, appealing public to participate in charity activities such as replacing online portrait, experiencing hunger, donating 1 day meals. These activities went viral on mobile internet thanks to their unique themes and excellent interactive experience and in 3 days, attracted over 100,000 participants with 200,000 Yuan (\$ 30,769) total donation.

4, Focus on Continuous Study

To maintain a sharp sense of and fast response to new trends, accumulate and digest lessons and experience, CFPA has adopted a weekly discussion system. It also invites renowned experts in the industry to train internal staff from time to time, and is quick to participate in sharing experience with others which helps better communication and impels organizations to have deep-in understanding of mobile internet and follow effective practice.

From the success of CFPA, it is clear that in the new era of mobile internet, non-profit Organizations must give strategic priorities to internet and are required to adopt concrete actions in optimizing systems, promoting HR structures and developing capacities to materialize their ideals.

(V) The Second Official Website of Free Lunch—Charity E-shops

Free Lunch E-shop started operation on Tmall on 13th July, 2011, the first ever on Tmall. It fared very well the whole year, raising 4.35 million Yuan (\$0.67million) in total, relatively the same level with 2013, accounting for 25% of all the funds Free Lunch foundation raised in 2014. Over 80,000 transactions have been made on its E-shop with more than 20,000 buyers, among whom 30% donated more than once.

Free Lunch E-shop created a new mode for sales characterized with virtual goods, derivatives, and cause-related marketing which was adopted by many other E-shops. 70% of all the goods on Free Lunch E-shop are virtual goods sold for donation. It is based on where the project is and is always in the name of a school. Derivatives include T-shirts, emblems or other dedicated souvenirs, the majority of which are similarly for donation while expenses if any are marked to specific items. The owner of E-shop observed that currently it is concentrating on virtual goods donation and will put more efforts in developing derivatives as a concern to promote the brand image simultaneously while raising funds. The cost of derivatives will be stringently controlled and may cooperate with commercial brands for certain high quality derivatives. On the whole, **the success of Free Lunch Charity E-shop can be attributed to the following points:**

1, Good at Making Best Use of All Possibilities

Being the first Charity E-shop on Tmall, Free Lunch Foundation gained tremendous support from Tmall, Taobao Auction, Taobao Judge, and Taobao Gongyi. The E-shop invested rather low in terms of labor but output good results. Currently only 1 full time staff (who is also taking care of other online fundraising issues) is working on the E-shop and 1 part time staff responsible for after sales service, together with 5-8 key volunteers taking charge of customer service and logistics. The operation and storage of the E-shop, however, is done by its partner companies, free of charge. As for cooperation with other firms, Free Lunch and Lukfook Jewellery launched a philanthropic diamond pendant named “Love is Beauty”. They fixed the price at 698 Yuan (\$107.4), and a portion of 50 Yuan (\$7.7) will be contributed to Free Lunch platform every time a pendant is sold in a shop other than the Free Lunch E-shop in which case, all the proceeds will be given to Free Lunch. It is cooperation in which Lukfook Jewellery are mainly doing offline sales while Free Lunch focuses on online exhibition. They are continuing such cooperation in 2015.

2, Attention to Brand Building

How Free Lunch Charity E-shop gained the strong support of platforms has so much to do with its solid foundations laid down by good projects and forever brand promotion. Barring the function of fundraising, its strategic importance is so salient that it can even be regarded as a second official website of Free Lunch Foundation. It does not only sell virtual and real goods, but functions as a mouthpiece for the dynamic status and latest activities of Free Lunch Foundation. Slightly different from its official website, the activities displayed on the E-shop provide more options facilitating organizations to accommodate users on Tmall with more appropriate information.

3, Intercommunication with Donors

Free Lunch Foundation is not a one-way approach for information circulation, but rather an effective channel for intercommunication with donors. Aggressive and successful trials have been placed by the E-shop to facilitate communication with donors and would-be donors through Alitalk. At the dawn of 2014, it managed to lead those who wished to know more about Free Lunch to Alitalk for point to point communication with customer service volunteers who would brief the project. Such approaches produce higher efficiency than telephone calls or emails as one staff can answer several donors’ questions in real time without causing a sense of indifferent distance. The public impression on Free Lunch was noticeably changing as more and more questions were no longer “what is Free Lunch” but something rather deeper such as “when the meal starts” or even gave recommendation of a school that fits into the donation category. Better results can be achieved for developing more donors through such intercommunications.

4, Heed to Increase Re-donation

Tmall is able to automatically generate analysis on donors and with the help of relevant software, and it can acknowledge the donors on Tmall E-shops by sending short messages. It is convenient for Free Lunch Foundation to set up how often a communication with the donors should be given to develop relationship which are very important for re-donations.

5, Dedication to Training Volunteers

Operations on Free Lunch Charity E-shop requires huge amount of communication works with the public which are done mostly by volunteers who shall therefore meet certain standards. For example, volunteers must study the customer service manual well to get themselves fully aware of the projects before undertaking real works. They are also expected to know well about procedures of internal communication and participation.

It can be drawn from the success case of Free Lunch Foundation that Charity E-shops are not simply a fundraising approach, more importantly, they serve as dialogue windows between organizations and the public. The effectiveness of such communication can not only facilitate organizations to get timely feedbacks of the public, but also consolidate loyalty and thus generate more donations.

(VI), Crowd-funding, Pack Up Children to Be Fund Raisers

“Little Hands , Charity Dream—DIY Ornaments by Kids at 10 for Autistic Peers” was a crowd-funding project launched by a group of kids born after 2000, in hope of raising funds by offering their handmade ornaments for autistic kids in Shanghai Qingcongquan Training Center. By donating 5 Yuan (\$0.77), a donor will receive a letter of thanks from the kids or 100 Yuan (\$15.4) for a chain bracelet or other ornaments. Those little angels learned such crowd-funding mode from economy classes for children and initiated the project. They set up their own marketing, financial, and handcraft departments and so on. They opened many sales channels like schooling sales, stationery consignment, WeChat shops, charity selling in Carrefour etc. They raised 11,755 Yuan (\$1808.5) finally from 98 supporters, 2351% of their previous target of 500 Yuan (\$76.9). Among all donors, 31 donated 5 Yuan (\$0.77), 66 donated 100 Yuan (\$15.4). It was an extremely successful example characterized with a highlight story of those children averaged at 10 making efforts to help other peers and coordinated with both online and offline propaganda and sales promotion³⁷.

From this case we can draw the conclusion that there are no formidable standards for crowd-funding platforms, which allows individuals and NGOs much accessible channels for fundraising. The public is thus encouraged by Non-Profit Organizations to raise funds for themselves. Donors for crowd-funding, compared with other common donors, are more inclined to fulfilling dreams, be it an organization’ s dream or an individual’ s wish.

Ever since the Crowd-funding cult began sweeping through Non-profit industry, many organizations, small groups or large players all have tried this new channel, yet very few encouraged the public to raise funds for themselves. For not short period of time, most organizations fail to encourage their supporters or the public to raise funds for themselves, which, however, can reduce cost, and enlarge donor bases. Even more ignored are children who, though weak in raising capacity, have stronger resources standing behind including parents, grandparents and parents’ friends to whom the organizations can have their projects better introduced via the children. At the beginning of 2015, a survey by nfpSynergy shows that 23% of parents doing donation simply because their children want them to. For ordinary people, children’ s wishes are more likely to be supported. Children fund raisers are more likely to become long term supporters of organizations when they grow up.

³⁷ from project page <http://www.zhongzhou.com/deal-show/id-201543>

(VII), Probing the New Area—Four New Channels Experienced by CCAFC³⁸

5 years since the founding of China Charities Aid Foundation for Children (CCAFC in short), it upholds an ideal of “Being Non-Governmental, Grant-making, Cooperative, Transparent” and has worked out various channels for fund-raising. By the end of July, 2015, it has raised accumulatively over 500 million Yuan (\$76.9million). In the past 5 years, statistics have witnessed a gradual reduction of corporate contribution and comparable rise of individual donations. In 2014, 56% of the total amount of 94,653,000 Yuan (\$14,562,000) has been done by individuals and 44 % by companies. 35% of the total was done online. By the first half of 2015, individual donations have exceeded 80% of the total, becoming the main channel for CCAFC. The secrets lie in effective utilization of third party platforms combined with self owned channels and also in developing and promoting diversified donors.

The third party online channels employed by CCAFC include Tencent Gongyi, Sina Gongyi and Ant Love which contributed 70% of individual donations combined in 2015, amongst which 34 million Yuan (\$5.2million) came from Tencent, 83% of the total on the platform, 4.65 million Yuan (\$0.72million) from Ant Love and Taobao, 11.3% and 2.326 million (\$0.36million) from Sina Gongyi, 5.6% respectively. **CCAFC’s success on third party platforms can be attributed to the following points:**

- 1, The development of mobile internet provides better access to individual donations and while medical aid projects are likely to be chosen by most donors, the majority of CCAFC’s projects are for aiding and rescuing sick children, a great advantage compared with other charity projects, liable to be favored by public.
- 2, CCAFC gives strategic priority to public donation, stressing on both fundraising and publicizing. By make the best use of various online donation platforms, its brand recognition has been increasingly boosted.
- 3, Most of the projects on these platforms are individual cases and CCAFC are best at packaging individual projects. It is most capable of telling the most touching stories and by doing that, it gained huge sums of donations on third party online players.

Yet CCAFC did not rely solely on third party platforms but actively created its own fundraising channels and broadened third party offline cooperation channels, driving diversification in all possibilities of public fundraising. Except online third party platforms, CCAFC has further tried other channels such as its official website, offline mails, fundraising activities and advertisement, in which 15% of the funds were raised via official website, 2% by mails, 13% by activities and ads respectively. Though those online platforms have a upper hand in terms of the amount of funds, self owned channels help CCAFC gain more information of the donors, which is the foundation for long term fans and other donors in addition to online third party donors.

It might be painstaking, though, to operate on CCAFC platform which takes about 5 minutes for each donation as it does not have monthly contracting mechanism, nor does it have access to mobile terminals, organizations do benefit a lot from its self owned channel for maintaining and precisely analyzing donors. On CCAFC website, more than 160 donors have done over 10 times of donation, some being doing every day with the amount ranging from 1 Yuan (\$0.15) or 2 Yuan (\$0.3) up to 50 Yuan (\$7.7). Those long term fans, though do small contributions in short run, become true treasures for organizations in long views with their life-long contributions and contagious influence on others around.

Except for website fundraising, CCAFC also tried ads. “Readers’ Illumination Campaign”, launched in 2013 for raising funds for Children Eye Disease Treatment by placing permanent ads in Reader, a magazine. By now, it has raised over 4 million Yuan (\$0.62)of donations, most of which were over 500 Yuan (\$77) (a single donation) and were sent by post in cash. Such a campaign is aimed at a donation group very different from the young mainstays in their 20s or 30s. They were middle aged intellectuals, aged 30-50, in particular, those relatively wealthy elders who are leading a life with less burden. By giving detailed introduction to and rolling progress of the project stipulated in the permanent ads, such precise positioning helps expand offline fundraising channels and win over new donors. The development of elderly donors makes organizations move even closer to inheritance donations.

Direct mail is rarely seen in China. CCAFC elaborated its envelop and wording for this offline campaign during the Spring Festival in 2015 and finally received 15,910 Yuan (\$2447.7) via 42 donations out of much many mails. Among them, 30 donors remitted 12,380 Yuan (\$1904.6) by post in cash with an average of 413 Yuan (\$63.5). For CCAFC, it might become a brand new channel for bigger donors and loyal fans.

Despite the convenience and low cost, online third party fundraising platforms have their limitations in enlarging donor population and getting data. To try various other channels, combine both online and offline resources, develop new donors and allocate channels for different types of donors is very useful for stable and steady development of organizations’ fundraising activities and the expansion of their brands.

³⁸ data here are cited from CCAFC

IV, Global Dynamism and Trends

(I), Key Third party Online Fundraising Platforms all over the World

Global third party online fundraising platforms came into being around the year of 2000 with mainly two types. The first type is independent third party online fundraising platforms including JustGiving, VirginMoney Giving, GlobalGiving. JustGiving was founded in 2001 and has over 20 million donors donating over 3.3 billion US dollars³⁹ for more 13,000 organizations across 164 countries. VirginMoney Giving, an independent platform under VirginMoney, established in 2009, is currently the official fundraising platform for London Marathon. By the end of 2014, the funds it raised exceeded 300 million Pounds, with over 9000 organizations⁴⁰. GlobalGiving was founded in 2002 and has by now raised more than 180 million US Dollars with 470,000 donors⁴¹. The former 2 platforms are not open to Chinese organizations at present while GlobalGiving does not set up regional barriers and is accessible for Chinese organizations. Except for all necessary documentations, an organization must pass the Global Challenge that means it must gain at least 50 donors and no less than 2,000 Pounds (on its British and the US websites, 40 donors and \$5000) in a month on the website of Global Giving before it is qualified to operate on this platform. The second type is commercial websites (not limited to Charity E-shops in form) where Non-profit Organizations are given access, such as Ebay and Give as You Live.

7 Attributes of the Above Mentioned Key Global Third Party Online Fundraising Platforms as Compared to Chinese Ones

1, More Professional

Most are exclusive third party online fundraising platforms rather than a byproduct of a certain organization

2, They Charge

While most of Chinese charity platforms are free of charge, global ones incur registration fees or transaction charges.

3, Fundraisers on the Platforms

There are mainly 3 types of fundraisers: individuals, organizations and firms. Individuals and firms can launch a project at any time to raise funds for registered Non-profit Organizations. At present, there are more than 10,000 Non-profit Organizations on JustGiving. Firms are allowed to design their own web pages and lobby their workers to donate.

4, Tasteful

The platforms may send to the public reminders which might be a good reason for donation including special occasions like birthday, wedding, graduation, etc., or for personal challenge such as losing weight, quitting smoking and hiking, or for special people like a past friend or simply for existing activities like joining a marathon.

5, Customized Web Pages for Fundraisers and Non-profit Organizations

Functions such as to customize user interface or image, upload pictures or videos are available.

6, Easy to Share

All platforms can be shared to social media like twitter or facebook while most third party online platforms in China are not open for sharing due to competition.

7, The Real Competition is Technology

Technologies are updating very fast on these platforms and independent commercial operations bring fatty profit which can be reinvested in research and development of new donation channels, making donation access better and better.

Ebay, One of the Strongholds of Non-profit Organizations and Public Donations, Is Outstanding in Many Ways:

1, Charity E-shops

Non-profit Organizations open E-shops on ebay, selling goods donated by companies and the public⁴². They also work out other interesting approaches to attract public donation such as Non-profit audition in which people bid for the goods. Over 100 million US Dollars have been raised in this way since 2000. CLIC Sargent, a Non-profit Organization based in UK, reserves a motif audition every year. Last year, the motifs for auction were characters of books whose authors were induced to donate their next heroes. But as most organizations run their own Charity shops both online and offline, E-shops on ebay are not the focal points of most organizations.

³⁹ <https://www.justgiving.com/en/about-us>

⁴⁰ <http://uk.virginmoneygiving.com/giving/about-us/press-centre/virgin-money-giving-celebrates-five-years-of-success.jsp>

⁴¹ <https://www.globalgiving.org/aboutus/impact/>

⁴² Ebay, <http://pages.ebay.com.hk/charity/>

2, Charity Goods

There are currently 9,000 Non-profit Organizations available for sellers on eBay UK and since June this year, a new function “sell-for-charity” has been added on eBay USA and eBay UK by which sellers can donate 10%–100% of the sales proceeds to a Non-profit Organization in eBay database. Over 2 million people⁴³ chose eBay donation access in UK and the figure is expected to grow further with this new app.

3, eBay Give at Checkout

At checkout on eBay, one can choose to pay 1 Dollar more (at most \$25) to a favored Non-profit Organization.

4, Approval Rating

Organizations can initiate a voting campaign on “eBay for Charity” for eBay prize to the most favored 3.

What is worth mentioning is that whenever someone registers an account on eBay, he/she can tick the option “the organization most loved” that will allow automatic approval rating every time he/she donates a part of consumption or selling.

Apart from that, more and more e-commerce platforms are providing various channels to facilitate Non-profit Organizations for fundraising. Take Give as you live and Give for sure as examples. Give as you live is a shopping website for charity that accepts organizations to register on its platform to which all department stores and other businesses give online shopping access. By Give as you Live platform consumers can choose their preferred Non-profit Organization to which a proportion of the sales proceeds will be given by the online department stores or other businesses where they shop. They can choose any one of the 200,000 or more Non-profit Organizations in UK via over 4,000 popular retailers⁴⁴. The platform also provides price comparison service. Since 2013, it has helped 7,500 organizations raise more than 6 million Pounds. Give for Sure does very similar practice with Give as you Live except for it being a mobile app.

Development of technologies, massive awareness of charity and the win-win mentality enable prevailing cross-industry cooperation, and more convenient fundraising channels are bringing the idea of charity much closer to us.

(II), Volunteer Fundraisers

It is a commonplace behavior for people in the US or UK to raise funds for NGOs as all organizations value the ordinary donors pretty high and thanks to the streamlined fundraising channels. On their websites, there is always a “Donate for us” portal through which they offer a list of funny ideas, detailed fundraising steps and easy-to-download posters as well as local contact information. In addition, some organizations turn those details into brochures and mail them to the donors. They may hold award-giving ceremonies to encourage public raisers. Some large organizations will also select their annual volunteer fundraisers and thank them in public just as Cancer Research UK did in the past 13 years on end⁴⁵. In 2014, the prize for Excellent Volunteer Fundraiser went to Kay McCay who became a volunteer to CRUK since 1980 and has raised over 750,000 Pounds with her team for the organization.

Volunteers are typically divided into two types. The first type consists of those volunteer to raise fund when organizations give off an appeal such as joining a sporting campaign like a marathon for charity while the second type volunteers are mostly initiators who raise fund for anything such as a birthday party, or a bet against a friend for a challenge. Such volunteers use mainly third party platforms like Justgiving. They design their own web pages and share the links to social media or directly to friends. Some, however, may choose offline activities to raise funds.

In 2009, charity:water created a birthday fundraising page on its website, calling people to replace the traditional birthday gifts giving with raising donation funds. By importing birth date on the page, one will be given a figure of how many peers sharing the same birthday who declare to raise fund for charity:water⁴⁶ instead of receiving gifts. By now, over 60,000 persons have promised to take part and some 9 million USD have been raised in this way by the supporters with an average \$770 each.

Though Chinese third party online platforms have come into being just recently, they move under a formidably stronger momentum compared with the primitive phase that other global platforms experienced. The rapid development of mobile internet in China gives immense drive to Chinese online donations that enjoy an even more abundant future market full of opportunities. As statistics show, in 2014, mobile third party payment market in China reached 5992.47 billion Yuan (\$921.9billion), a growth of 391.3% year-on-year⁴⁷. It is projected to reach 18 trillion (\$2.8trillion)⁴⁸ in 2018. By the second quarter of 2015, total number of mobile netizens in China was up to 657 million. Admittedly, however, compared with other global players, Chinese platforms do poorly in certain ways such as functionality, development and industrial support. They have, currently, low level of personalization access to which donors may design their own page, making them less interesting and subsequently less persuasive to donors’ participation. Due to fierce competition, third party online platforms share little with one another, most of them impossible for cross-platform sharing, downgrading their sociality, fund amounts and effectiveness. Being a small portion of those commercial platforms, or even though being independent in some cases, unable to find appropriate profit modes, they are reluctant to invest in new technologies therefore move rather slowly. Lacking various training courses of fundraising methods for organizations popular in other global players, Chinese organizations get very few industrial supports except for general platforms.

⁴³ <http://pages.ebay.com/hk/charity/hk/charity/pp15.html>

⁴⁴ Give as You Live, <https://www.giveasyoulive.com/aboutus>

⁴⁵ 4 charities that recognize their best volunteer fundraisers and supporters with awards, <http://www.ukfundraising.com/>

⁴⁶ Charity: water, <https://my.charitywater.org/birthdays/>

⁴⁷ from @Research, China’s third party mobile payment market reached 5,992.47 billion Yuan in 2014, <http://www.199it.com/archives/331855.html>

⁴⁸ from @Research, “Report on China’s Mobile APP Market in 2015”

(III), Global Charity Crowd-funding Platforms

Despite the large quantity of Charity crowd-funding platforms, they function more or less the same with Chinese ones in terms of attributes and modes. Famous crowd-funding websites like Kickstarter, Indiegogo and the like are all omni-purpose crowd-funding ones with charity forming only one part. They are, however, more professional. For example, Indiegogo has a function called “Certified Non-profit Organizations” that helps donors identify reputable options.

Both in China and in other countries, crowd-funding has been defined as a way to win over new donors. In Canada, for instance, demographic statistical analysis shows that between 2007 and 2010, mainstream donation groups in Canada remained almost unchanged, implying that donation groups do not change as the whole population grows but are always the same groups⁴⁹. This reality forces many organizations to regard crowd-funding as a channel to find new donors⁵⁰ while in the meantime, many global Non-profit Organizations render crowd-funding a route to increasing participation in donation, obtaining public trust by transparency and connecting donors and donees. That is why many global organizations, apart from raising funds, are sparing no efforts in building dialogues with the public via crowd-funding, advocating their ideals and converging like-minded supporters when Chinese crowd-funding organizations are mainly focused on increasing fund amounts.

A typical example is the Girl Scouts of the USA in West Washington that made a blockbusting success on Indiegogo recently when they returned a huge donation of \$100,000 as a rejection to the request of the donor who wanted the sum not to be used on cross-genders. The Girl Scouts adhere to a principle of “fair, pluralistic” and treat cross-gender girls equally so that the organization returned the fund. \$100,000 is a big sum for this branch of Girl Scouts, around 1 third of the annual scholarship funds it provides to beneficiaries and it decided to raise back another \$100,000 in the name of “For Every Girl”. The caption of the crowd-funding read “Help us raise a sum of \$100,000 that we returned, because we do help cross-gender girls”. It raised over 180,000 dollars within a day and in total 338,282 dollars. The crowd-funding not only helped Girl Scouts make up the loss, but by posting a brief text video to social media like facebook, twitter and youtube, attained a far-reaching propaganda result for its We won’t exclude ANY Girl mission. The success of Girl Scouts’ crowd-funding lies in its quick response to best dissemination point and its long accumulation of various elements which have been kept in store for the right moment. It was a fast move, simple, but touching. The loss was thus made even.

V, Summary and Prospects

2014 was again a bumper harvest for Chinese charity with a total fund amount of 104.226 billion Yuan (\$16.03billion)⁵¹, and increasingly more organizations are turning to public fundraising and are actively developing online donation cause. Various channels based on mobile internet, Charity crowd-funding, sporting and experiential fundraising methods collectively broke out in 2014.

Though rather late comers, Chinese third party online fundraising platforms are taking an express lift, powered by mobile internet. They were no longer solely confined to those commercially supported platforms in 2014 as more and more independent players are coming to the spotlights. Donors on each of the key third party online platforms vary significantly in gender, age, region, donation amount, frequency and preference.

(I), Significance of Chinese Online Fundraising in 2014

1, Top 4 Third Party Platforms Serve as an Important Dynamo for Chinese Online Fundraising

The total amount of online fundraising raised on third party platforms in 2014 exceeded 437 million RMB (\$67.2million), among which 426 million (\$65.5million) (97.5% of the total) was raised on the top 4 platforms, namely Sina Gongyi, Tencent Gongyi, Ant Love and Alibaba Gongyi. They are doubtlessly an important dynamo for Chinese online fundraising platforms. The top 4 were respectively sponsored by Sina Weibo, Tencent, Ant Financial and Alibaba Group, 4 internet giants with their huge user bases, rapidly evolving technologies and superfluous operational experience to provide convenient channels for fundraising and at the same time for donation. They are the driving force for the development of Chinese online fundraising.

We are confident that these key platforms will also serve the future of China’s online fundraising as innovative engines by providing more intriguing and beneficial fundraising modes and practice.

2, Mobile Donation Plays the Main Role in Online Fundraising

With the development of mobile internet, mobile donation comes to lead the fad when all key platforms are shifting focus to mobile terminals to provide more convenient fundraising channels.

⁴⁹ Traviswww.19, Traviswww.199it.com/archi Potential of Charitable Crowd-fundingit.com/ar, <http://traviswww.199it.com/images/pdf/CharitableCrowd-funding-TravisSouthin.pdf>

⁵⁰ Vera Peerdeman, “a Peerdemantuin.com/images/pdf/Charita?”,

⁵¹ From “Report on China’s Charity Donation in 2014”, <http://gongyi.sina.com.cn/ggzy/qt/2015-09-21/doc-#kxhzev08933639.shtml>

In August, 2014, when Tencent launched Donate-Together, droves of organizations were attracted by its convenience and started their public fundraising based on mobile terminals and friends cycles. Tencent Gongyi Foundation, founded in 2007, has been dedicated to construct an internet platform and only realized its target of raising 100 million Yuan (\$15.38million) in almost 5 years, most of the funds being donated through PC terminals, however, it raised more than 100 million Yuan (\$15.38million)⁵² in 2014 alone. By August of 2015, online fundraising amount has exceeded 500 million Yuan (\$76.9million)⁵³ at remarkably accelerating speed. As data from Tencent shows, over 50% of the donors⁵⁴ did their donation via mobile terminals in 2014.

In 2014, Ant Financial gave prioritized position to its Ant Love Donation App on the 8.1 version of mobile Alipay Wallet to better facilitate Non-profit Organizations and make it possible for users to donate at the quick portal on Alipay Wallet, which turned out to be noticeably effective.

During the earthquake that hit Ludian in 2014, Alibaba launched its donation project on Taobao mobile terminals which fared better than on PCs while on Tencent Gongyi Platform, about 80% of the donations relating to Ludian earthquake were done on mobile terminals.

Non-profit Organizations have also made their efforts in mobile donation such as CFPA who regarded 2014 as a year of mobile internet and assigned a dedicated panel to carry out all necessary works on mobile donation platforms and help interconnectivity among projects. During the earthquake that hit Ya'an in 2013, 27% of the donation amount came from mobile terminals while the figure rose to 79% during Ludian earthquake in 2014.

3, Innovative Fundraising Methods and Traditional Methods Jointly Push Forward the Development of Online Fundraising

Diversification and innovation were the highlights in 2014 for online fundraising participants. Sporting Matching Gift platforms such as step-count matching program started booming, allowing users do donation synchronously with sporting, Donate-Together on WeChat converts donors into fundraisers for their favored organizations while experiential fundraising practice, typified by Hunger Challenge, placing donors in their beneficiaries' positions to feel how they feel and how Non-profit Organizations are undertaking the important mission.

Among all, experiential practice has made tremendous growth in 2014 with many well known successes such as "Ice Bucket Challenge", "No Words Today", "Smile Challenge" etc., and as estimated, over 1.4 million people have participated. Generally, experiential campaigns are dependent on social media like Sina, Tencent and the like to disseminate and thus raise funds. They came to lead and subsequently drive the third party fundraising platforms to grow. Diversified participation ways help donors experience fun and satisfy their sociality demand, which enrich their lives while at the same time, create a better charity environment.

4, No One is Alone—All Types of Non-profit Organization, Big or Small, Can Find A Perfectly Right Platform

Since 2005 when 2 Non-profit Organizations found their ways to Taobao E-shops that drew the curtain of China's performance of third party online fundraising platforms, a pluralized structure of online fundraising players has been established after ten years efforts by 2014. They focus on different directions and areas, serving Non-profit Organizations of various types and scales. For instance, NGOs without a public offering qualification can opt to Charity crowd-funding platforms or allow subscriptions to public offering foundations on their projects which can then be launched on Sina Gongyi, Tencent Gongyi or Ant Love. Large public foundations and reputable projects, for the purpose of lowering cost, can also try monthly donation platforms or get onto the shortlist of Alibaba's Item-sell-for-charity projects.

As it goes, Sina Gongyi, taking best advantage of its dominating platform, is tapering down from cooperation with public fundraising partners while strengthening its influence by Starlight Non-profit Power Alliance, Social Good Summit—the best new media for charity and other activities which focus more on propaganda cooperation between resources including renowned Micro bloggers, media and corporations with Non-profit Organizations to secure its role as a socialized charity propaganda platform. NGOs, therefore, find themselves better served in promoting their influence on Sina Gongyi than solely aimed fundraising.

Generally speaking, to secure a fundraising project, a NGO needs to know the specific rules, functions and attributes of each and all platforms as well as the traits and preferences of different giving groups to make an appropriate choice, taking into consideration of its own situation. Once the project is launched, it is further required that efforts must be made in self propaganda and operation while paying special attention to would-be donors by precision lobbying.

(II), Prospects of China's Online Fundraising

1, Further Diversified Forms to Be Seen on China's Third Party Online Fundraising Platforms

Though various types of third party online platforms have been faring quite well in China with all kinds of functions, there is still plenty innovative room for them to develop as indicated by global experience and the developing tendency. We can learn from those global successes to further drive volunteer raisers, improve personalization design flexibility for more effective participation of the public. We are confident that larger third party online fundraising platforms in China will do much better in persuading volunteer fundraising. What is more, though small and medium sized organizations are rarely accessible to monthly donation programs which can improve their financial stability and long-term planning, independent third party platforms certainly can make a good show on this niche arena.

From a overall perspective, China's third party online fundraising platforms will become more diversified, more versatile with independent third party players more dedicated to specific segments and niche areas.

2, Small and Medium Sized Organizations Show Huge Potentialities

Online fundraising enables small and medium sized organizations to raise funds on a much larger scale, breaking through the traditional confinement to geography. Thanks to the momentum generated by third party online fundraising platforms, quite some organizations of this size have come to the fore, though they are still weak in terms of project packaging and promotion compared with their large counterparts. Global experience shows that small players can move even faster as a 2014 Blackbaud survey indicates that small organizations (less than 1 million Dollars annual raising capacity) enjoy a 10.6% annual growth rate, higher than 9.7% of medium sized (1-10 million USD annual capacity) and 8.0% of large ones (over 10 million USD annual capacity).

It is shown that to gain a better results and larger share in the increasingly competitive online fundraising market, organizations must regard online fundraising as a serious product to optimize its design and operation rather than merely a channel for raising funds. That means organizations must take the traits of the users on the platforms into account in designing and packaging a project and to think and publicize with a sense of internet. Moreover, they must mobilize all their staff to get a better and deeper understanding of this era of internet characterized by decentralization, making every staff a fundraiser. It is our belief that practice is the best teacher from whom small and medium sized organizations can do hugely well with online fundraising by learning and developing from actions.

3, The Monolith of Mobile Internet Rolls On

In 2014, mobile donations grow at a marvelous speed. As M-payment and mobile new media keep changing people's paying and reading habits, the way of fundraising will spontaneously be changed in the future and the mobile trends in fundraising industry will become even more conceivable.

We therefore suggest that Non-profit Organizations keep tuned to the latest weather vane of third party online fundraising platforms, improve their propaganda skills and awareness, try various service channels on mobile terminals like Alipay Wallet service window, WeChat service accounts etc., to usher in the great wave of mobile donations, better prepared, fully prepared.

As we see it, China's third party online fundraising platforms will move towards a more professional direction, providing expertise to both donors and Non-profit Organizations. Thanks to the never-stopping evolution of online payment systems, online fundraising channels will be more convenient, though online information safety may loom large to Non-profit Organizations and donors all together. Meanwhile professionalization requires continuous investment in science and technologies. Some platforms may otherwise try profit modes and invest part of the profit into new technologies to sustain innovation and development of their platforms. Good and creative interaction between organizations and online platforms will bring about more innovative forms of online donations thus to make charity a more common thing in more ordinary Joe's eyes and lives.

⁵² From "Tencent join hands with partners for 9.9 Charity Day", <http://mt.sohu.com/20150908/n420603828.shtml>

⁵³ From "Report on Tencent Corporate Social Responsibility, 2013-2014"

⁵⁴ "80% of the donations for Ludian earthquake relief were from mobile terminals: the advent of online fundraising", http://news.ifeng.com/a/20140814/41575634_0.shtml

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