

*Developing a
Fundraising Program*

Presentation for Support4Communities

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Developing a Fundraising Program

- to launch or expand an effective and sustainable fundraising program
- goal of the presentation is to help identify the objectives of your organization's fundraising plan
- provide the tools to develop the framework for your organization's fundraising strategy
- incorporate into your strategic planning

Topics

1. Defining Program Objectives - provides a clear picture of your current financial position, current funding needs, and long term financial goals
2. Evaluating Capacity - an assessment of your organization's resources
3. Identifying Target Markets - categorizing groups who would support your fundraising initiatives
4. Assessing Various Fundraising Options - identifies which initiatives are best fit to meet your funding needs
5. Fundraising Best Practices - ensures your organization is prepared administratively and in compliance

1. Program Objectives

Why do you need to raise money?

- to fund operations
- for a specific program or service
- for a one-time capital project
- to build a reasonable cash reserve

What are your immediate or short term needs?

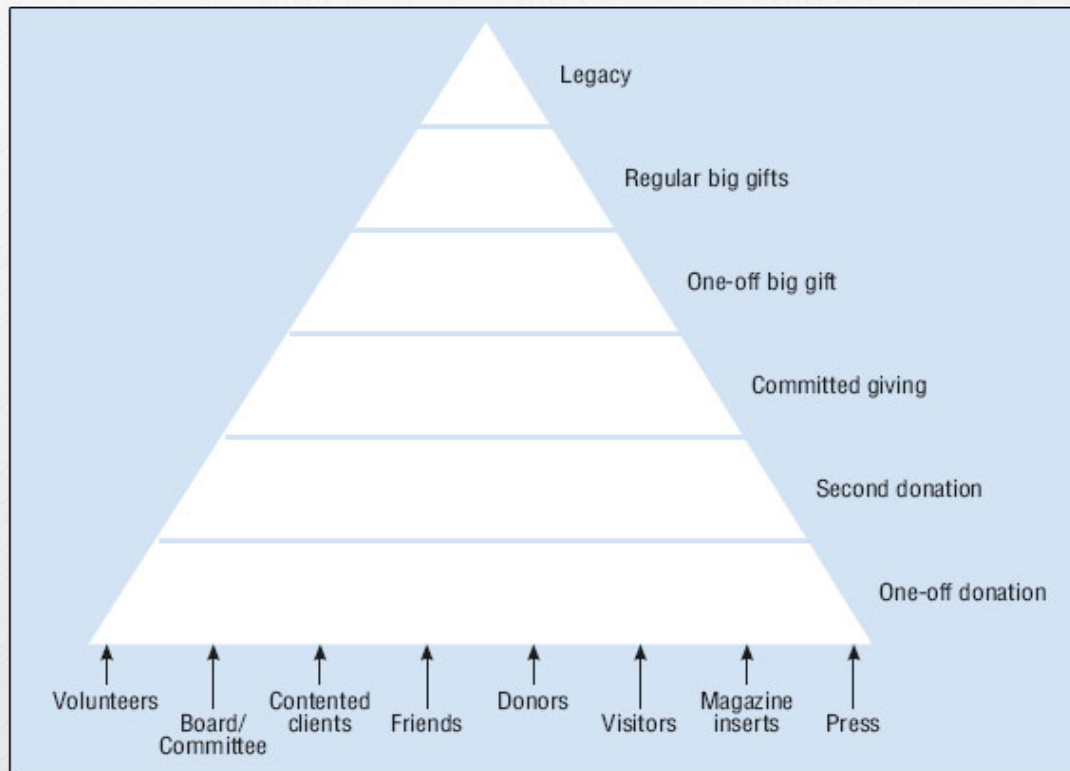
- review budget
- identify any financial shortfalls, choose appropriate fundraising activity

If no immediate needs, first year - no specific financial goal

What are your long term needs?

- capital campaign, program funding, staff
- develop three year to five year plan
- specific financial goals and outcomes for one, two and three years
- include objectives in marketing material

Donor Pyramid



Fundraising Program Objectives

(include ongoing program/service needs
and your “wish list”)

1. _____

2. _____

3.

4.

5.

Short term funding needs (\$)

(within 1 year/before fiscal year end)

1. _____

2. _____

3. _____

Long term funding needs (\$)

1. _____

2. _____

3. _____

5 Year Plan (\$)

(add short term and long terms needs with your wish list)

Year 1

Year 2

Year 3

Year 4

Year 5

2. Organizational Capacity

What staff resources are available?

What other organization resources are available?

- financial _____
- office space/needs _____
- volunteers _____

Board of directors

Donor prospects (e.g. who do you serve, size of constituency)

Opportunities to leverage programs and services?

Administrative – accounting, receipting, donor records

3. Target Market

Who are you hoping to solicit support from and who will give you the best return?

- internal/external audiences
- identify for each initiative
- current stakeholders best bets
- help set realistic financial goals

Internal	Potential Support
Staff	e.g. committed giving
Board Members	
Volunteers	
Ex-board members, staff, volunteers	
Previous donors	
Program recipients	
Program participants	

External	Potential Support
General Public	
Companies with same target market	
Companies	
Charitable organizations and foundations	
Other charities or non-profits with similar goals	

The COVID-19 Crisis

What adjustments to fundraising goals, activities, and plans do you need to consider during the COVID-19 crisis?

1. Timelines – immediate, long term
2. Is it the right time to fundraise?
3. Cancelled/postponed campaigns and events

4. Fundraising Options

Which initiatives are best fit to meet your funding needs?

- short term needs require fundraising initiatives that can provide funds immediately/in the same fiscal period
- longer term needs means an organization has room to develop and grow an initiative over multiple years

Cost to Raise a Dollar

High (\$0.75 plus)

Direct Mail Acquisition

Telemarketing

Direct Mail to existing Donors

Medium (\$0.50)

Special Events

Sponsorships

Partnerships

Low (\$0.20)

Planned Giving

Major Gifts

Capital Campaign

Annual Campaign

- targeted audience
- internal and external
- follow up phone calls/emails
- Social media?
- database entry
- face-to-face meetings

Annual Campaign

COVID-19

- suggest 2-way communication, ask how they are doing?
- ask for monthly donations rather than one-time

Campaign

Meets Objective? _____

Target Market? _____

Date/Timeline _____

What resources are needed?

Staff _____

Board _____

Volunteers _____

Campaign materials _____

Financial _____

Administrative _____

Special Events

- golf tournaments, dinners, auctions, walks/runs
- broad target audience
- raise funds and awareness, engage volunteers, fun to plan and attend
- no particular financial goal, avoid shortfall

Special Events

- labour intensive
- plan well in advance, avoid scheduling conflicts
- make sure volunteers are well supported
- for the first year, put in the 150% expense rule

Special Events

Covid-19

- hold online event/switch to online appeal
- online event – golf, entertainment, gaming?, auction
- alternative advertisement for sponsors, adjust benefits
- not necessarily going to be less expensive

Special Events

Meets Objective? _____

Target Market? _____

Date/Timeline _____

What resources are needed?

Staff _____

Board _____

Volunteers _____

Event materials _____

Financial _____

Administrative _____

Grant Proposals

- subscribe to Imagine Canada, Big Online
- similar to government grant proposals (e.g. application process, reporting)
- applying for grants from government, and charitable organizations and foundations not fundraising

Sponsorships

- usually events
- specific program or initiative/general sponsorship
- advertisement and alignment primary focus
- benefits package - ensure levels are appropriate

Crowdfunding

- practice of funding a project by raising monetary contributions from a large number of people
- via the internet
- dependant on public awareness of cause
- have a “one-off” feel to them

Communications

(overall and fundraising-specific)

- newsletters, e-newsletters _____
- marketing brochures _____
- launch or enhance website _____

Communications

- develop Case for Support _____
- videos _____
- Social media _____

5. Fundraising Best Practices

Stewardship

Administrative

Calendar of Events

Accountability and Transparency

Stewardship

- acknowledgement
- keep records private
- recognition in newsletters, annual reports
- donor appreciation events/initiatives

Administrative

- good record keeping and accounting
- proper receipting practices and safeguards
- donor records
- develop volunteer recruitment management plan

Calendar of Events

- include both fundraising and programs
- roles and responsibilities
- annual activity and program summary
- regular reports to the board

Accountability and Transparency

- review CRA's Guidance on Fundraising
- capture all revenues and expenses associated with fundraising activities; must be reported on T3010 Information Return
- Imagine Canada's Standards Program or the Association of Fundraising Professionals (AFP)
- ensure Board review financial statements

CRA's Guidance on Fundraising

When is fundraising not acceptable?

- is a purpose of the charity
- delivers a more than incidental private benefit
- is illegal or contrary to public policy
- is deceptive
- is an unrelated business

Receipting for Gifts

- ‘gift’ as defined by CRA
- erroneous receipting: services, admission fee, purchase of goods or lottery tickets, sponsorships, other charities
- best practices – do not lend registration number

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