



SLA

SASKATCHEWAN LIBRARY
ASSOCIATION

Comprehensive Fund Development Strategies

Presented by: Kathleen Crowther
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DCG PHILANTHROPIC SERVICES INC.

DCG Philanthropic Services teams with nonprofits, charities and corporate entities to enrich and inspire lives in Canadian communities

Victoria **Saskatoon** Toronto **Regina**

Fundraising Campaign Execution:

Specializing in major gifts in support of capital campaigns

Legacy Giving:

Planned giving strategy development, implementation and management

Marketing:

Brand, communication and research

Sponsorship:

Corporate partnerships and brand activation

Research and Writing:

Prospect research, proposals, newsletters

DCG is based in Treaty 6 Territory and the Traditional Homeland of the Métis and pay respect to the ancestors of this place and the many treaty territories in which we live, work, and serve.



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Remai Modern

Capital & Programming Campaign:
\$40 Million

Lead Gift: **\$30 Million**

Wanuskewin Heritage Park

Capital Campaign: **\$40 Million**

Lead Gift: **\$13.75 Million**



SHAKESPEARE on the SASKATCHEWAN

Shakespeare on the Saskatchewan
\$3M campaign, \$1.3M lead gift



RMHC
Saskatchewan

Ronald McDonald House Charities Saskatchewan
\$10M campaign,
Goal exceeded with \$100K+ gifts





Merlis Belsher Place

Project Cost: **\$43 Million**

Capital Campaign: **\$33 Million**

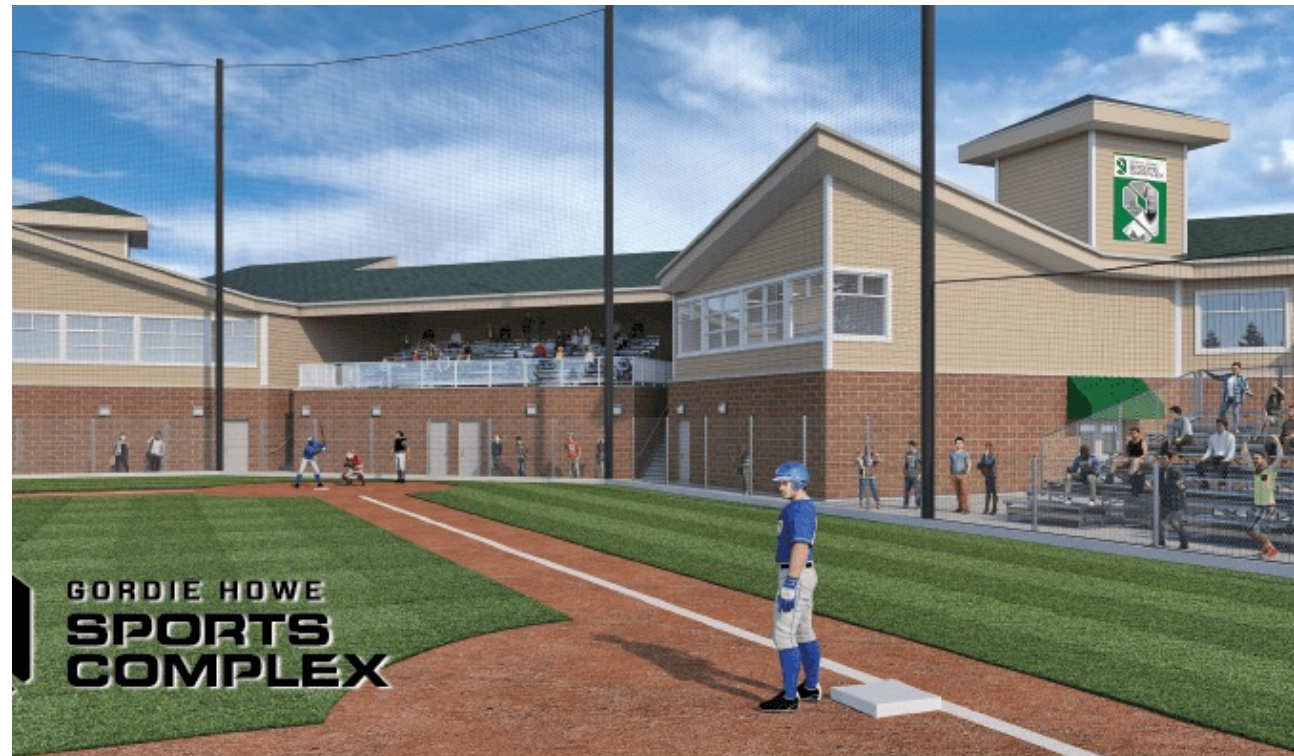
Lead Gift: **\$12.25 Million**

Gordie Howe Sports Complex

Project Cost: **\$68 Million**

Over \$60 Million raised

Lead Gift: **\$20 Million**





Special Olympics Saskatchewan
 Saskatchewan Roughriders
 Food Banks of Saskatchewan



What we will cover today



Core elements that need to be part of all fund development programs



How to approach an annual campaign raising under \$100,000 to a \$1M+ major gift or capital campaign



How to integrate legacy giving programs into the fund development mix



Building a culture of philanthropy

Fund Development Considerations



Capacity

Staffing
Internal/external
resources



Donor processing and tracking procedures

Donor management
software



Policies

Gift Acceptance
Receipting
Recognition and
Stewardship
Legacy Giving

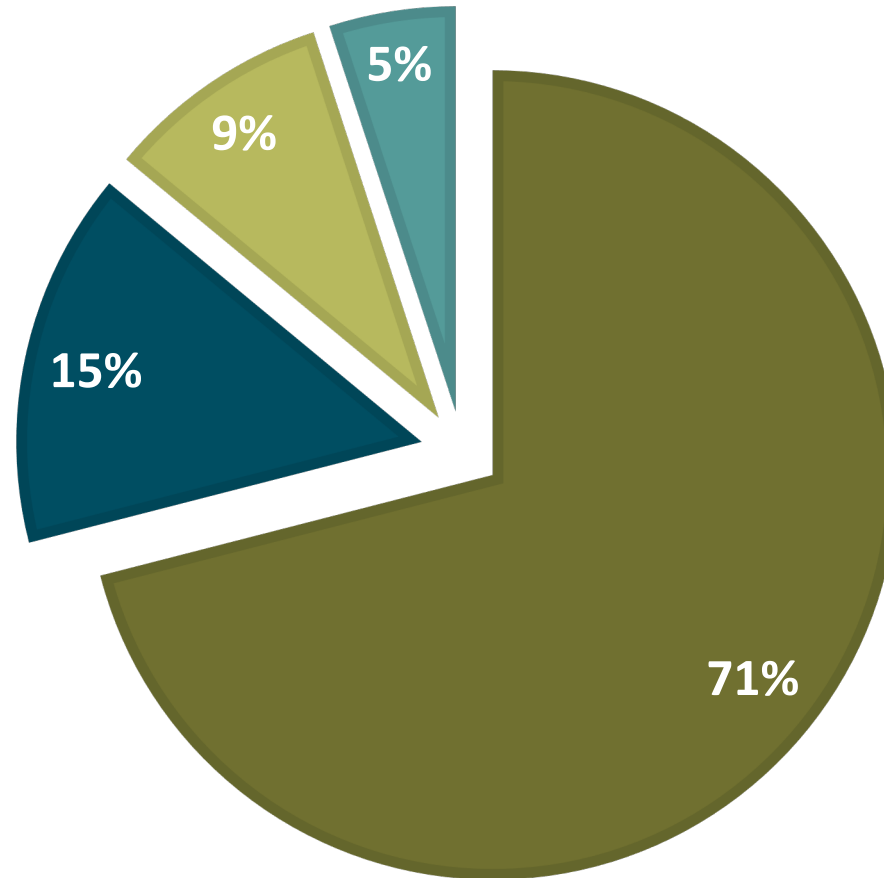


Fundraising costs beyond the campaign

Sustainable Revenue
Operational Costs

Who's giving?

■ Individuals ■ Foundations ■ Estates ■ Corporations



Based on averages of research in Canada, United States, and United Kingdom

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Why People Give



How People Give

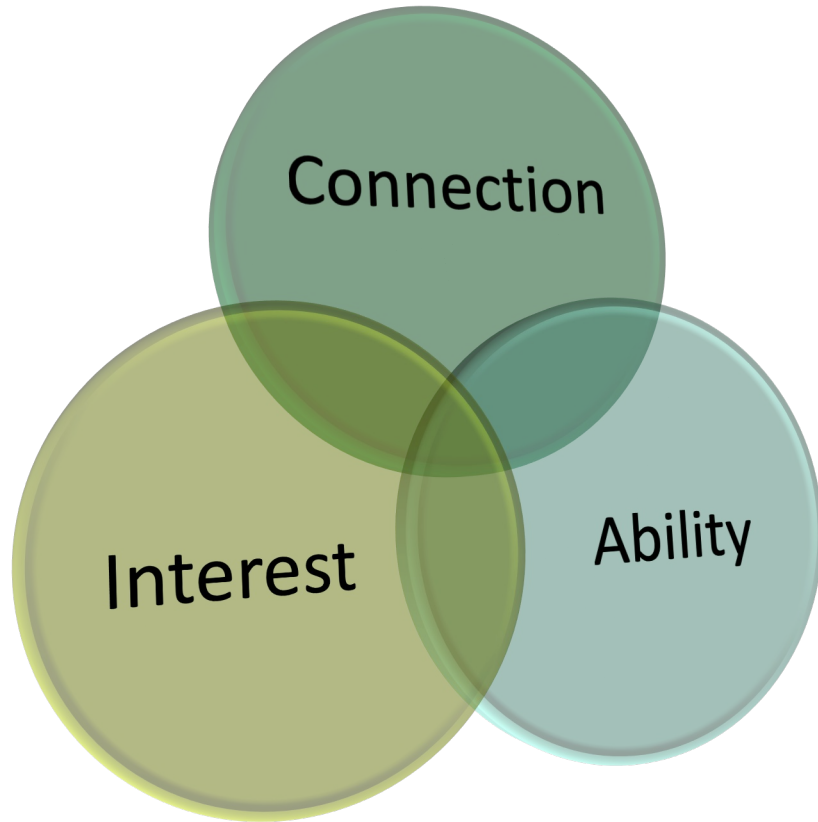


COMPREHENSIVE FUND DEVELOPMENT

Fundraising Costs & ROI

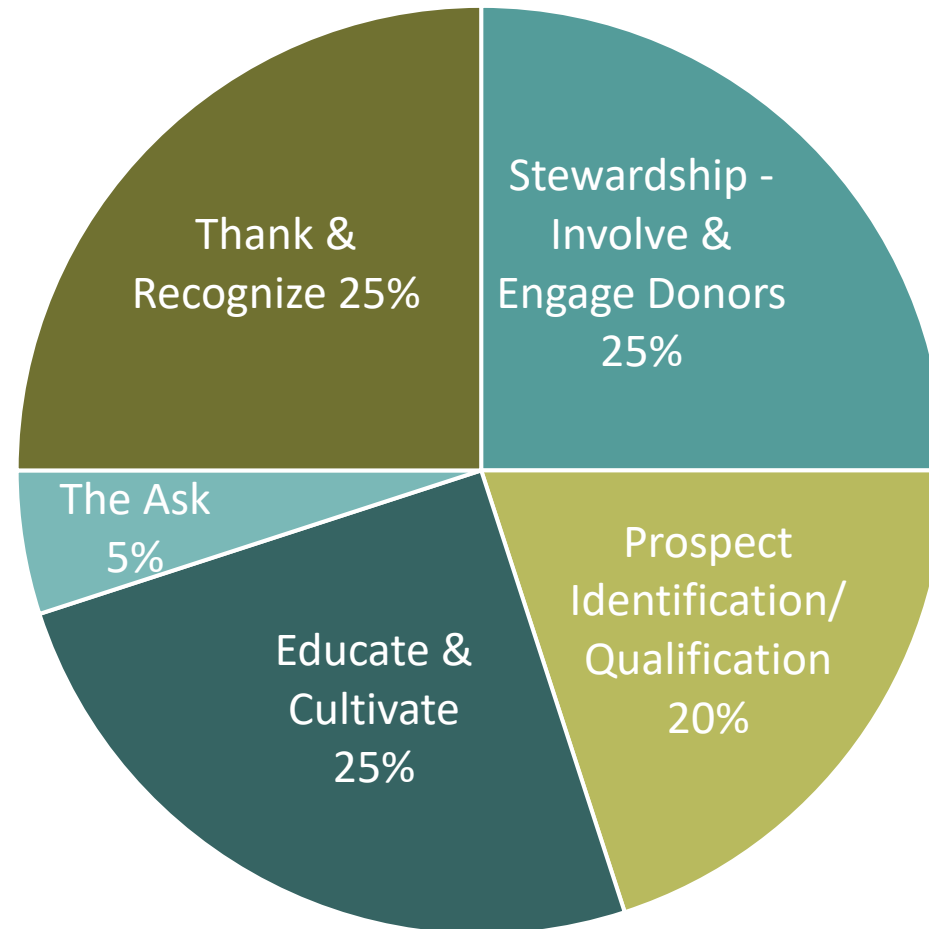
National averages for fundraising costs and return on investment		
Method	Cost to Raise \$1	Return on Investment
Direct mail to general lists (non donors)	\$1.15	-15%
Special events	\$0.50	50%
Planned giving	\$0.25	75%
Direct mail to prior donors	\$0.20	80%
Foundations/corporations	\$0.20	80%
Major gifts	\$0.05 - 0.10	90-95%
National Average – All Methods	\$0.20	80%

Donor Engagement



- ✓ Emotional Connections
- ✓ Personal Relationships
- ✓ Community Impact
- ✓ Leadership
- ✓ Sense of Ownership/Investment

Donor Engagement Cycle



Solicitation Vehicles



90% of donations
come from
10% of
donors

Benchmarks of Fund Development Success



Increase in overall revenue



Elevated giving frequency



Expanded donor base

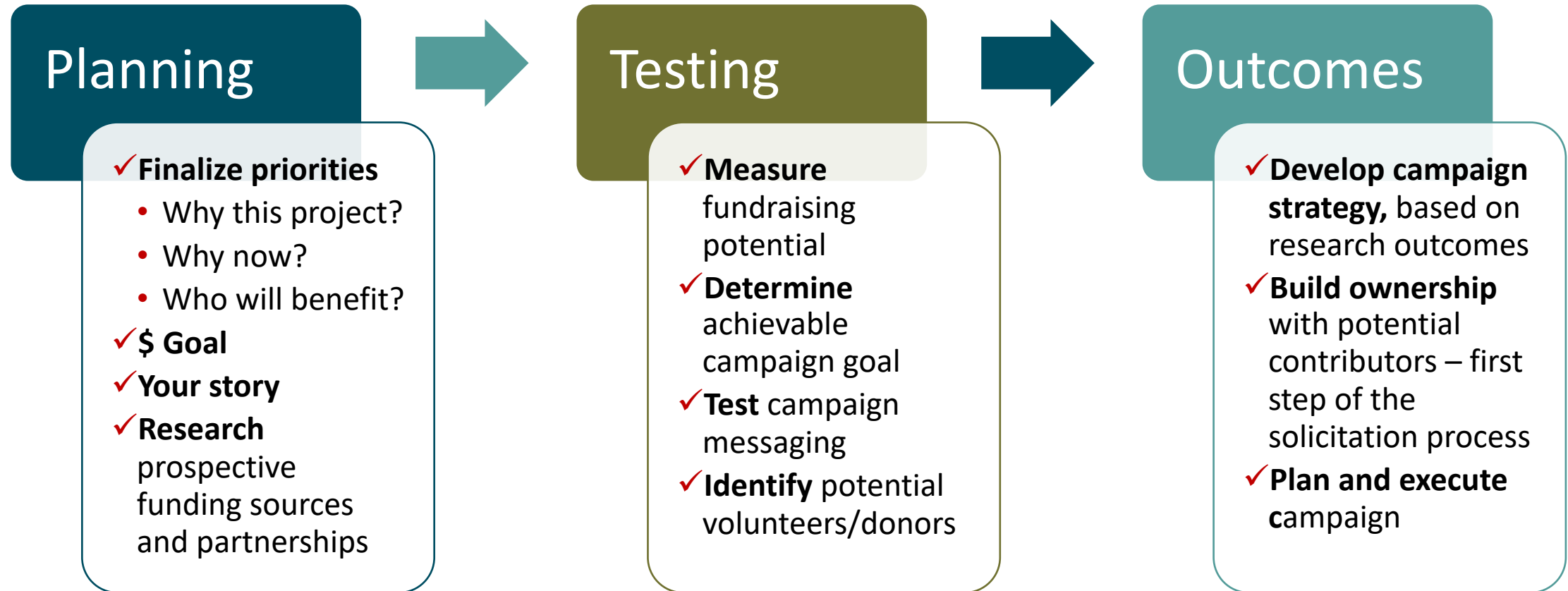


Increased volunteer engagement

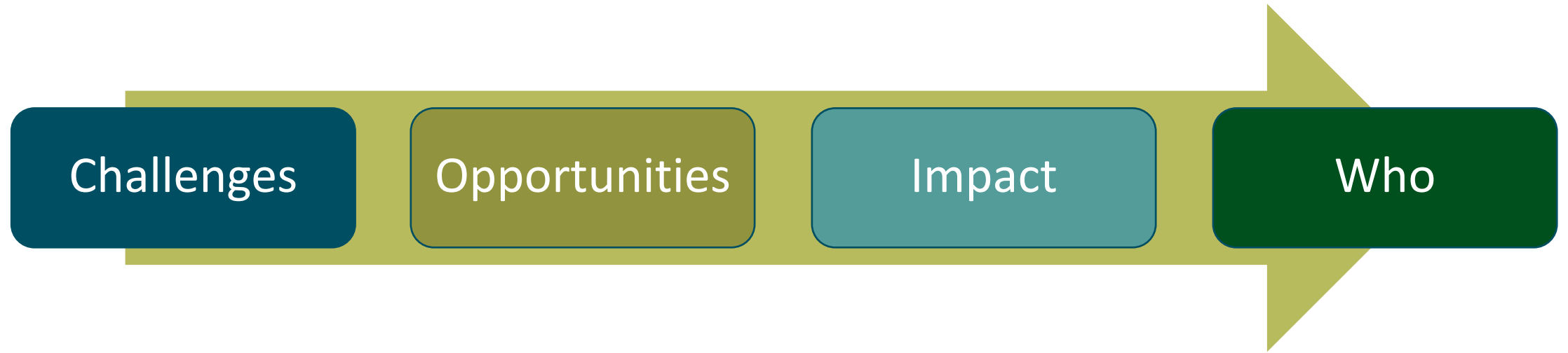


Improved donor retention rates

Process is key to success



Defining your Priorities - Building the Case



- ✓ What's the story and why will it matter to the donor, our community?
- ✓ What challenges are we trying to overcome?
- ✓ What are the opportunities?
- ✓ Who's being impacted?
- ✓ Who will benefit and how?

Determine the \$\$\$\$ Goal/Budget

What is the fundraising goal?

What are the post program costs?

Ensure milestones are manageable

- ✓ Consider the complete campaign budget
 - Project cost
 - Campaign costs e.g. staff, consulting, etc.
 - Bridge financing costs
 - Creative services and printing
 - Donor & volunteer costs
 - Stewardship program
 - Post campaign revenue/operating costs

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What is an Annual Campaign?

Annual solicitation for donations usually in support of operations

Can be a single appeal or several appeals throughout the year

- Mid-year
- Giving Tuesday
- Season of Giving



Benefits of an Annual Appeal

- Provides ongoing source of operational funding
- Builds donor base
- Creates cycle of giving
- Deepen relationships with existing donors
- Identifies potential major or legacy gifts

Policies and Procedures

Policies

- Gift Acceptance
- Donor Acknowledgement
- Third Party Fundraising
- Corporate Sponsorship

Procedures

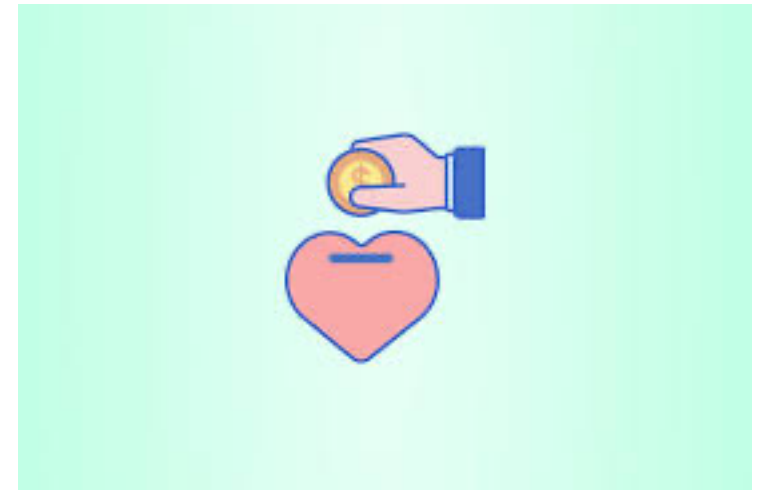
- Receipting
- In-kind
- Securities/stocks
- Valuation
- Storing donor information

Resources

- Board/staff roles
- Donation software
- Website
 - Traffic capacity
 - Online donations
- Mail-in donations

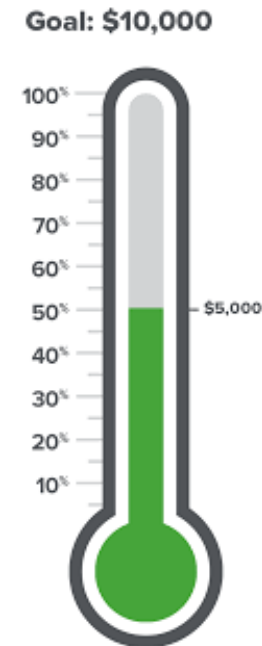
Annual Campaign Strategies


- Type/Frequency/Timing
 - What is the best time of year?
 - How many campaigns?
 - Timeline?
- How will you communicate?
 - Direct mail
 - Phone
 - Email
- Budget



Defining your Priorities & Making a Plan

- **Financial goal**
 - Meet revenue targets
 - Increase average donation amount
- **Non-financial goals**
 - Attract volunteers
 - Broaden/diversify donor base
 - Who can be approached in the future for a major gift? A legacy gift?
 - Awareness of work/programs
 - Opportunity to recognize/attract lead donor to anchor campaign





Annual Campaign Case Study

Key Messages:

- Donations to the Feeding Holiday Cheer campaign will address food security right here at home:
 - o \$175 provides a family a complete hamper for the holidays
 - o \$75 provides Christmas breakfast for a family
 - o \$35 provides fresh produce for a healthy meal
- There are 36 food banks in Saskatchewan, reaching every part of the province
- Inflation is seriously impacting hunger and food insecurity and Saskatchewan's food banks are seeing increased demand with the rising costs of food, fuel, and housing
- Over 40% of food bank users are children

CAMPAIGN MARKETING BUDGET

Campaign Item	Specs	Amount
Facebook Ads	During campaign	\$400
Radio	During and post-campaign messaging on Harvard & Rawlco	\$2,000
Newspaper	Post-campaign ¼ page thank you ads in Leader Post and Star Phoenix	\$2,500
Events	Campaign launch event Promotional material (t-shirts, posters, etc.), snacks, photography	\$2,500
Graphic Design	Website and social media, advertising, and campaign marketing	\$1,000
		\$ 8,400

Feeding Holiday Cheer 2022 Campaign Plan

Date/Deadline	Campaign Activity	Deliverables
Sept 1	Campaign name and logo	Designed campaign name, theme, and logo agreed
Sept 1	Campaign kick-off/launch plan	Detailed event plan (who/what/where)
Oct 1	Signage	Digital and coroplast signs in buildings; arrange design, creation, set up/down
Oct 1	Campaign key messages	Basis for all campaign communications
Oct 15	Donor recognition plan	Establish recognition within campaign for major gift donors
Nov 15	Engagement of Nutrien Ag Solutions Offices	Introduce local Nutrien reps to correlating FBSK chapter
Nov 15	Nutrien Construction Partners Plan	Tailored campaign request letter and donor recognition.
Nov 27	Social media content calendar	Write and organize posts for Facebook, Twitter, Instagram
Nov 28	Canada Helps Donation Page	Create campaign page with logo, key messaging and fundraising goal
Nov 29	Campaign kick-off event	Lighting of the wreath by FBSK & sponsor reps at Nutrien HQ; photos; media release
Nov 28	Food Banks of SK Website	Skinned with campaign logo/messaging, key messages and links to Canada Helps campaign page
Nov 29 and Jan	Media Releases/Advisories (2) (campaign announcement and post-campaign report)	Write, approval from Nutrien, circulate to SK media, and post on FBSK website
Nov 29	Posters for Nutrien offices	Content and design; digital file for Nutrien
Nov 29/Dec 24	E-appeals (3)	Write and distribute at beginning/middle/year-end of campaign
Dec 15 & Jan	E-newsletters (2)	Write and distribute at beginning and post-campaign
January	Donor Recognition	Ensure all donor recognition is carried out in accordance with plan
January	Food Banks of SK Website	Revert website landing and donation pages back to pre-campaign
January	Campaign Impact Report	Comprehensive campaign report

Review Your Donor Data

- Is it complete and current?
 - Correct Spelling
 - Mailing address
 - Phone #
 - Email
- Make sure your data is clean
 - Unclean data can be costly
- Make the most of your data. Use what you have.
 - Segment or not?



Draft and Send Your Letter

- Personalize
- Make it easy to give
- Don't forget to ASK for a donation!
- Ask for a specific amount. Make it measurable.



The number one reason people don't give is...

THEY AREN'T ASKED!

Your past support has provided nutritious and safe food to your neighbours here in Saskatchewan. This year, we have seen a 37% increase in food bank usage over last year and need donations in order to meet demand.

The [Feeding Holiday Cheer campaign](#) has a goal to raise \$1M, the amount it costs per month for the 36 food banks across the province to feed everyone that comes through our doors.

Nutrien is kicking things off with lead donation of \$250,000 and invites **you** to join them.

Please join us by supporting your local food bank to spread good cheer and kindness this season.

- [\\$175 provides a family with a complete hamper for the holidays](#)
- [\\$75 provides Christmas breakfast for a family](#)
- [\\$35 provides fresh produce for a healthy meal](#)

On behalf of the 36 food banks across the province, I extend the very best to you and yours over the holidays and a safe and prosperous 2023. **Thank you for continuing your kindness to us this season.**

Sincerely,



Michael Kincade
Executive Director

PS – Saskatchewan food banks help to feed approximately 40,000 people every month, of which 40% are children. Your donation will help your local food bank distribute safe and nutritious food to families.



DONATE NOW



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Review and track donations



Ensure suitable donor/donation tracking is in place BEFORE you launch your campaign

Fundraising software
Well formatted spreadsheet



Enter all relevant data for each donation received

Name and address
Amount of donation
Date donation was received
Method of payment

Say Thank You

- Personalize the thank-you letter
- Send thank-you and receipt within 2 weeks
 - ideally within 48 hours
- Email is fine
- Suggestion: thank-a-thon

Thank you so much for your very kind gift to the Feeding Holiday Cheer campaign.

Your support will spread good cheer and kindness by addressing food insecurity during the holidays and into 2023.

Thanks to your generous gift, and the lead donation from Nutrien, we are continuing to do all we can to deliver safe and healthy food to those in need.

Thank you for feeding your neighbours right here in Saskatchewan.

With my very best wishes for you and the people close to you now and into 2023.

Donor Retention: Keep your donors close!

Retaining donors is much easier and less costly than finding new ones:

- Listen
- People give to those they are closest to
- Keep donors informed and engaged
- Thank donors often
- Don't be afraid to ask

Stewardship is key!



FOOD BANKS OF
Saskatchewan

donor newsletter

THANK YOU FOR SUPPORTING US IN 2022!

The Food Banks of Saskatchewan is starting 2022 by thanking **you** and the many generous donors across the province for your support of the *Feeding Holiday Cheer* campaign. With a lead donation of \$250,000 from Nutrien the food banks were able to feed everyone during the holidays and are starting 2023 confidently.

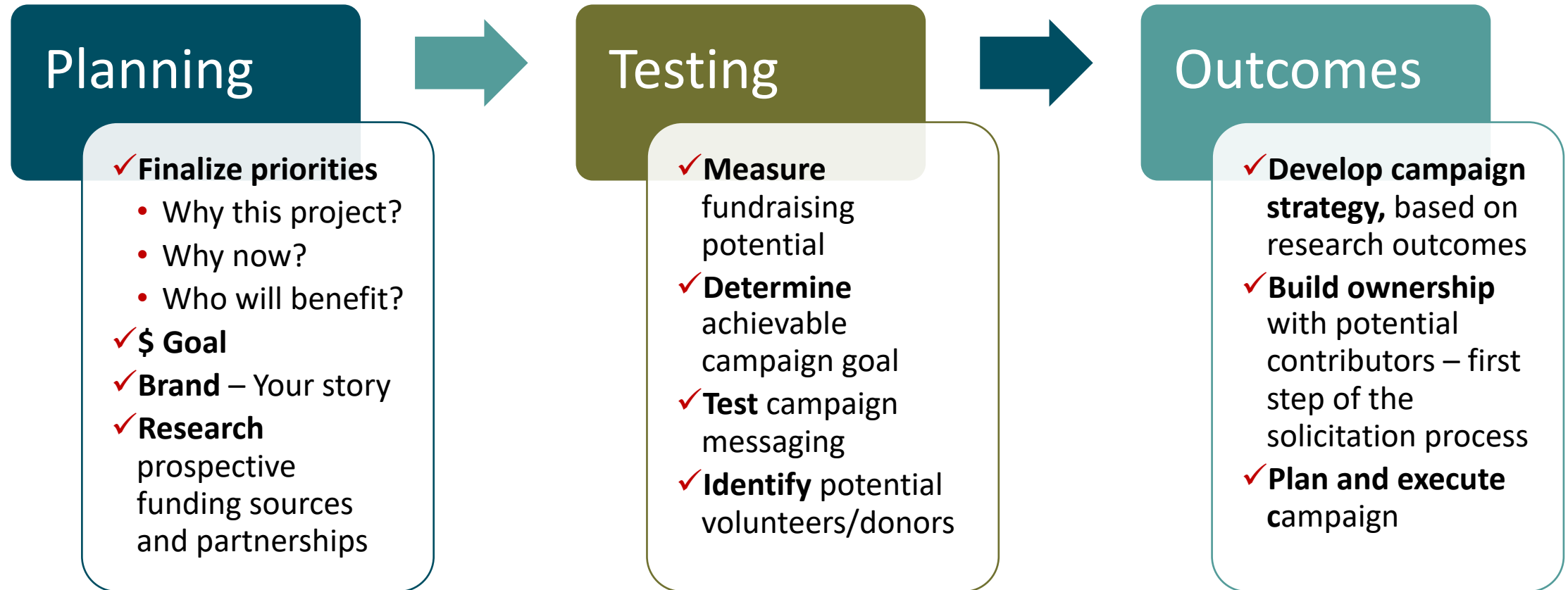
“On behalf of the 36 food banks across Saskatchewan, I extend a heartfelt thank you to each and every donor who joined Nutrien in making a donation during the holiday season,” says **Michael Kincade, FBSK Executive Director**. “Year after year Saskatchewan residents come together to support their neighbours and communities with food insecurities.”

Thanks to your support, Saskatchewan’s food banks have responded to the changing needs of folks in their communities and will continue to support those who need their services. Inflation is seriously impacting

YOUR GENEROSITY AT WORK IN 2022:

- **Yorkton Food Bank** used to serve 65 families a month, that has now risen to 95.
- **Saskatoon Food Bank & Learning Centre** is at concerning levels of people using their services with a steady incline in 2022. They now serve more than 20,000 people each month.
- **Prince Albert Food Bank** saw a client increase of 12% above pre-COVID-19 pandemic numbers and is now handing out 1,100 hampers each month.
- **Swift Current's Salvation Army Food Bank** went from 18 appointments a week in 2018 to 18 appointments a day in 2022.
- **Lac La Ronge Food Bank** used to send out hampers once every 4 weeks but now can only send them out once every 6 weeks due to increases in overall demand and food prices.
- **Kindersley Food Bank** handed out 154 hampers over the holiday season.
- **Weyburn Salvation Army Food Bank** distributed just over 89,000 lbs of food throughout 2022.
- **Battlefords District Food and Resource Centre** distributed 381 food hampers in 5 days right before the holidays.
- **Lanigan and District Food Bank** distributed 48 hampers in December.
- **Macklin & District Food Bank**, along with Secret Santa Assoc., provided 32 Christmas hampers that counted 46 children amongst the recipients.

Major / Capital Campaign: Feasibility Study – Strategy of Taking the Pulse First



Who will be interviewed?

- Major gift donor prospects
- Community leaders
- User Groups
- Volunteers and donors (current and potential)
- Organizations with aligning community investment priorities
- Foundations

Testing will tell you:



What parts of your case for support are well understood and what parts are not



What parts of the project are supported and what are not



What your capacity is and determine campaign structure/implementation strategies



Who needs to be on your campaign team



If/when you are ready to proceed to a live campaign!



What resources are needed

After the Study

When the Feasibility Study Report indicates that you are ready:

Planning Phase

- Develop campaign strategy
- Recruit Leadership, ambassadors, and volunteers
- Develop Campaign materials

Active/Quiet Phase

- Train volunteers
- Solicit lead and major gifts
- Finalize donor recognition plan
- Build promotional schedule

Public Phase

- Solicit general gifts
- Donor stewardship – announce gifts

Sample Gift Chart - \$500K Campaign Goal

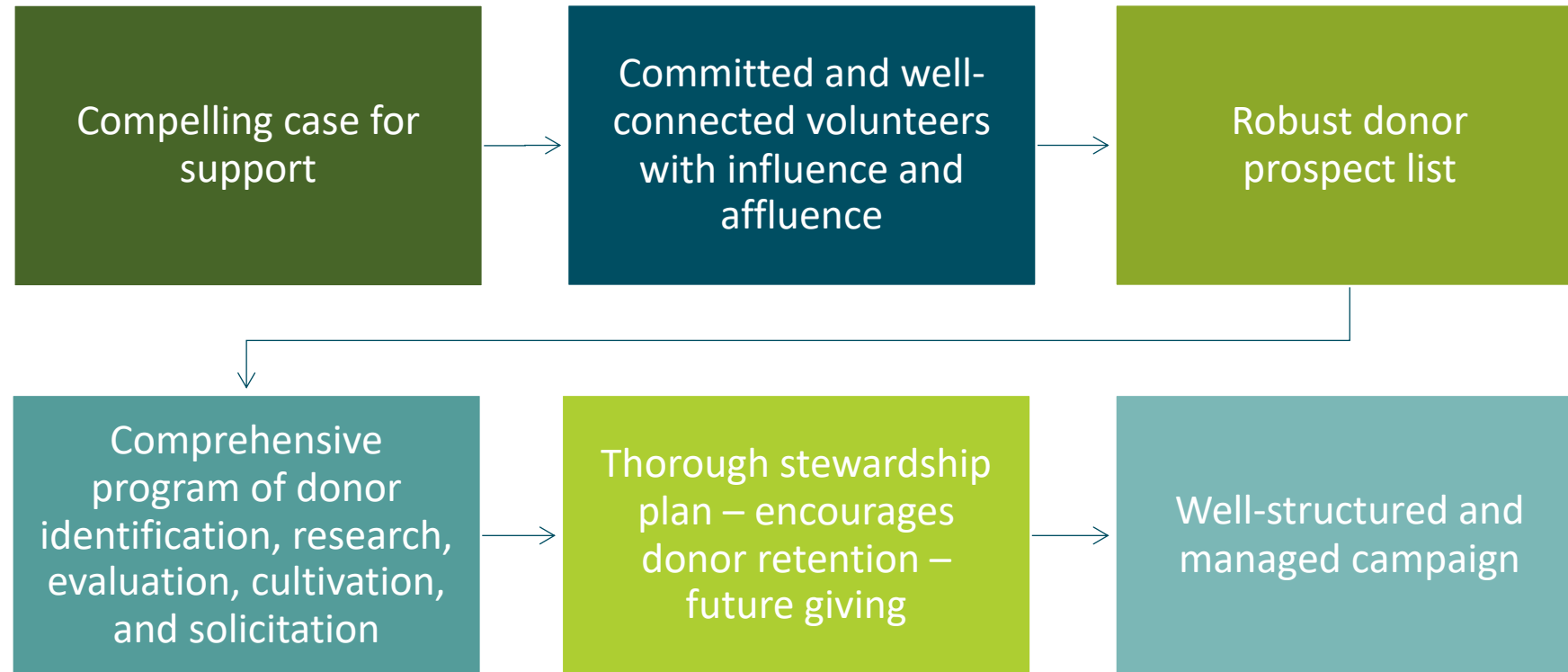
\$500,000 Total Campaign Goal					
Gift Range	No. Gifts required	No. Prospects required	Subtotal	Cumulative total	Cumulative percentage
\$150,000	1	4	\$1,500,000	\$1,500,000	30%
\$50,000	2	8	\$1,000,000	\$2,500,000	50%
\$25,000	4	16	\$1,000,000	\$3,500,000	70%
\$10,000	5	20	\$500,000	\$4,000,000	80%
\$5,000	6	24	\$300,000	\$4,300,000	86%
\$2,500	8	32	\$200,000	\$4,500,000	90%
\$1,000	20	80	\$200,000	\$4,700,000	94%
\$500	44	176	\$220,000	\$4,920,000	98%
\$100	80	320	\$80,000	\$5,000,000	100%
TOTALS	170	676		\$5,000,000	100%

Tax Benefits to Donors

Gift Level	Federal Tax Credit	Saskatchewan Tax Credit	Total Tax Credit	Cost to Donor After Tax Credit Applied
\$1,000	\$262	\$142	\$404	\$596
\$5,000	\$1,422	\$742	\$2,164	\$2,836
\$25,000	\$7,222	\$3,742	\$10,964	\$14,036
\$50,000	\$14,442	\$7,492	\$21,934	\$28,066
\$100,000	\$28,972	\$14,992	\$43,964	\$56,036

The above "Personal Giving Chart" model is for illustration purposes only and may not accurately reflect the actual tax consequences applicable to you.

Key Aspects of Campaign Success



What is a Legacy Gift?

- ✓ Contribution that is arranged in the present and allocated at a future date
- ✓ Usually given from accumulated assets rather than current income
- ✓ Tends to be larger than gifts given regularly from current income
- ✓ A statement about your values
- ✓ Provides ability to fund long-term needs and priorities



Strategy: Identify Legacy Donors



Older at gift date



Empty nest or no children



Average to above average income



Previous Giving – long-term, modest (consistent, past 5-10 years)



Institutional loyalty



Traditional Giving Preferences – education, faith, healthcare, etc.



Discovered through feasibility study

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What Legacy Gifts look like



Bequests in a Will



RRSP / RIF



Publicly Traded Securities



Life Insurance



TFSA



Other Legacy Giving Vehicles

Strategy: Build the Legacy Giving Program

Planning

- ✓ **Finalize priorities**
 - Why this project?
 - Why now?
 - Who will benefit?
- ✓ **What's your story?**
- ✓ **Review** data base and donation history
- ✓ **Prepare** legacy giving survey
- ✓ **Identify & Research** potential donor prospects & volunteers
- ✓ **Develop** program & communication strategies

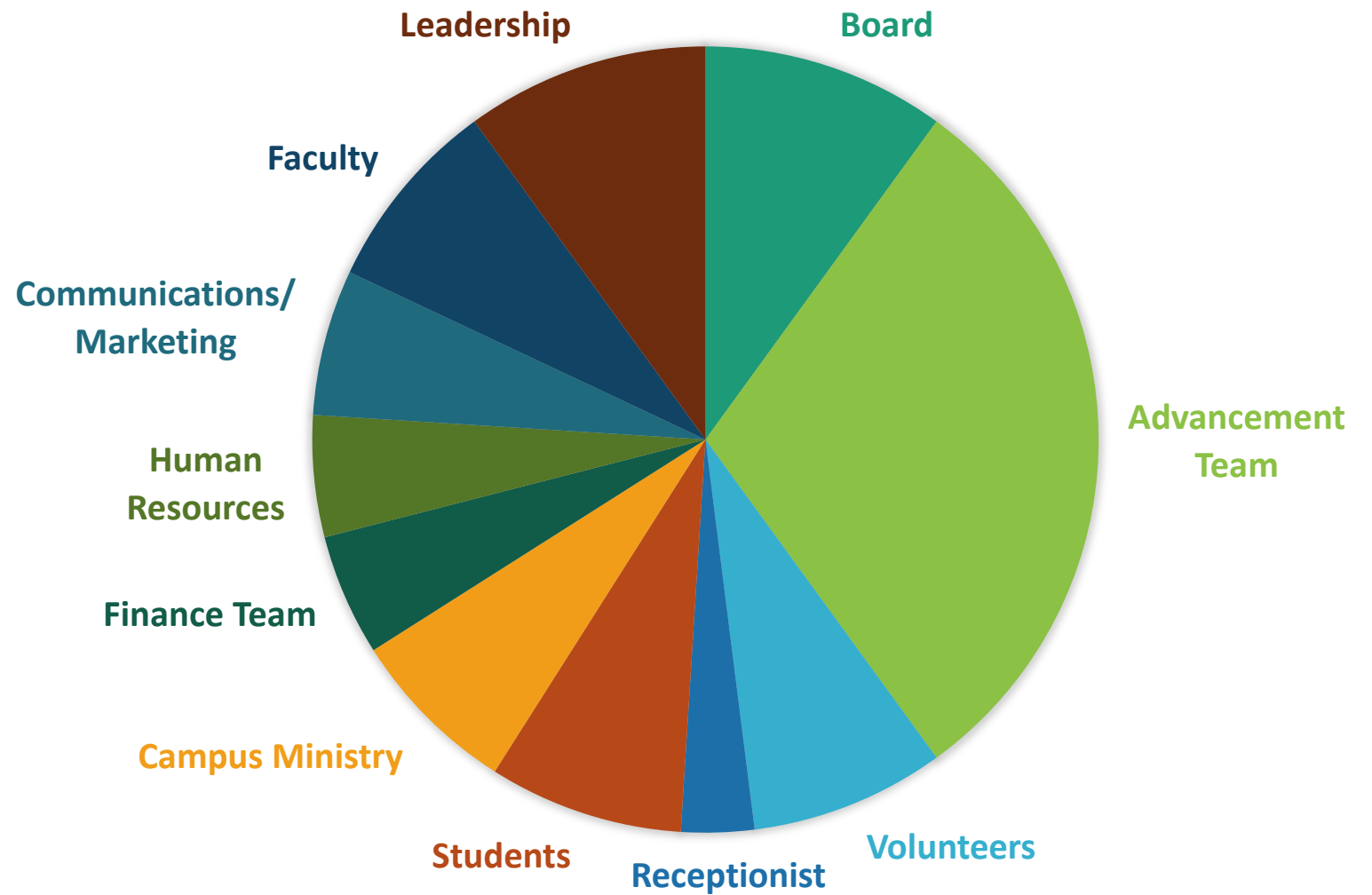


Implementation

- ✓ **Review/develop** legacy giving materials
- ✓ **Identify & Recruit** legacy giving volunteers
- ✓ **Train/Support** Board, staff, and volunteers
- ✓ **Build ownership** with potential contributors
- ✓ **Guide/coach** volunteers in the solicitation process
- ✓ **Integrate** legacy program into current Fund Development strategies
- ✓ **Establish** metrics to track progress

COMPREHENSIVE FUND DEVELOPMENT

Fundraising
Who's Involved?
EVERYONE!



Next Steps



Define needs



Make no assumptions -
TEST



Build prospective
donor/volunteer list



Engage stakeholders,
existing donors



Conduct
donor/volunteer survey



Begin conversations
with potential funding
sources



Secure campaign
leadership



Consider earned
media
opportunities

COMPREHENSIVE FUND DEVELOPMENT

How the Board can actively be engaged in fundraising

- ✓ Understand the fundraising priorities and be external ambassadors
- ✓ Help identify potential volunteers and donors
- ✓ Help build solicitation strategy and if appropriate become actively engaged in recruitment/solicitation
- ✓ Promote giving to all stakeholders
- ✓ Being good stewards of existing donors, i.e. annual thank you call, at your organization and other events, lunch meetings, etc.
- ✓ Make your own gift
- ✓ An understanding that EVERYONE is responsible for fundraising

COMPREHENSIVE FUND DEVELOPMENT

What does a Culture of Philanthropy look like?



Don't be afraid to be...

BOLD

What you do

MATTERS



Thank you!

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