

BEYOND GRANT WRITING

Child and Youth Advocacy Centres
Next Steps Meeting
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By: Cathy Mann, CFRE

Cathy Mann 
& Associates

416.778.1624 cathy@cathymann.ca

Welcome

Today's objectives:

- What does a diversified fundraising program look like for your cause?
- Readiness checklist
- How to raise funds from various constituents
- What are the first steps to get you there

Assumptions

- Most of you are from smaller organizations or organizations with smaller fundraising programs
- Fundraising may be one of many responsibilities you have
- You don't really have time to add much – or anything – new to your tasks
- You're already pretty good at grant-writing

Grant-Writing Stars R US

- You know how to find funders and how to write grants:
 - You have access to Imagine Canada's Directory of Foundations
 - Maybe you have other research tools
 - For those of you in Ontario, you're on a first name basis with a program manager at Ontario Trillium Foundation
 - You've had success securing grants and stewarding those relationships
- WHAT'S NEXT??

A question

- What does fundraising success look like for you?



**An interesting wrinkle –
collective impact**

**As a society, we can no longer afford
to operate in isolation.**

Anne Gloger, Director,
East Scarborough Storefront

An interesting wrinkle – collective impact

Some definitions:

- **Collective impact:** The commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem.
- **Backbone organization:** Creating and managing collective impact requires a separate organization and staff with a very specific set of skills to serve as the backbone for the entire initiative.

John Kania and Mark Kramer, **Collective Impact**,
Stanford Social Innovation Review, Winter 2011

Things to read

- The Little Community That Could, Cathy Mann, published by East Scarborough Storefront (www.cathymann.ca/book.html)
- Collective Impact, **Stanford Social Innovation Review**, Winter 2011, John Kania and Mark Kramer
- Tamarack Institute (tamarackcommunity.ca)
- FSG.org

Fundraising and collective impact

- Right now, anecdotal evidence suggests it's hard.
- Emerging research on collective impact seems to demonstrate a few key funders help get initiatives off the ground. Still difficult to get broad support.
- It's a new model and backbone organizations smack of "OVERHEAD". We're not overhead. We are critical – even key - to success. How do we deliver our message differently?

Some basics..

- I'd like us to go through some basics together.
- I want everyone to keep something in mind: in terms of fundraising, are we stronger together, individually or do we strategically decide who does what?

Some basics: readiness checklist

- Assess where you are
 - Often called a fundraising audit, this will provide a snapshot of where you are.
 - Done well, it lays the foundation upon which you can build.
 - Lots of resources on-line to conduct your own audit.
 - Consultants can provide objective review and analysis of development program.

Quick and Dirty Audit

Quick and Dirty Audit Checklist	Y	N	Needs work	Don't know or n/a	Structure or Culture?	Who is primarily responsible	By when	Comments/actions
BOARD								
Does the board understand why fundraising is important and are they supportive? (i.e. will they make their own donation; help identify prospects; make time at Board meetings for fundraising; be involved in the "ask" process.								
Does the organization have a strategic plan in which fundraising has been identified as a priority?								
Is the board able to wait for the return on investment of a new fundraising program?								
Will your ED:								
• Promote and, if necessary, support the fundraising program to/with the board?								
• Work with the board on fundraising?								
• Work with the dedicated staff to develop the fundraising program?								
• Make her/his own donation?								
INVESTMENT								
Can your organization allocate resources or make an investment in:								
• A dedicated person to fundraising? (PT, full time or reallocation of resources)								
• Training and professional development for fundraising staff?								
• Training and education for the Board/senior volunteers								

Quick and Dirty Audit

Infrastructure	Y	N	Needs work	Don't know or n/a	Structure or Culture?	Who is primarily responsible	By when	Comments/actions
• Can you capture names, addresses and giving history of donors?								
• Are you able to thank donors quickly, sincerely and often for their support?								
• Do you have financial controls and policies and practices in place?								
• Are you clear what you're raising money for?								
• Is it clear to the outside world what you're raising money for?								
Planning								
• Have you identified your strengths and areas that need improvement with respect to fundraising?								
• Have you identified which fundraising methods are appropriate for your organization?								
• Do you have a plan for implementing each method of fundraising you've decided to implement?								
• Have you developed a budget with realistic fundraising revenue and expenses for each method or activity?								

Feedback

Without over-sharing, what observations or insights did you get from this brief exercise?

Readiness Checklist

- When done well, a good Fundraising Audit will point out to you ***what you don't know***.
- It's hard to move forward when you don't know what you don't know.

Fundraising with different constituents

- What characteristics does my organization need to raise funds from:
 - Individuals
 - Corporations
 - Foundations
- **Consider:** will it be easier to raise funds as an single group or collectively from these donor constituents?

What fundraising activities will we focus on or add?

- How do you know what you can add?
 - Path of Least Resistance divided by Return on Investment
 - What strengths do you have?
 - What resources do you have?
 - Is there an opp for collaboration?
 - What can you learn from those who are already successful – either in Canada or US?

What fundraising activities will we focus on or add?

Consider both financial and non-financial goals

- Volunteer recruitment
- Board member job descriptions that include fundraising as an expectation
- Development of infrastructure (data base, stewardship, reporting, policies, etc)

It's important to work on structure and culture concurrently if you want fundraising to “stick”



THANK YOU!



Cathy Mann
& Associates

416-778-1624 www.cathymann.ca



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GENERIC SAMPLE DEVELOPMENT PLAN FOR ONE PERSON FUNDRAISING SHOP

GENERAL SAMPLE DEVELOPMENT PLAN FOR ONE PERSON FUNDRAISING UNIT																						
			People Involved						Year													
			CEO/ED	Chief Development Officer	Key volunteers	Chief Financial Officer	Program staff	Executive Assistant	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Activites																					\$ Goal	Non \$ Goal
Annual Fund																						
Direct marketing																						
Monthly Giving program				x																		
Direct Mail Campaign A				x																		
Direct Mail Campaign B				x																		
Newsletter			x	x			x															
Annual Report			x	x			x															
e-Philanthropy activities				x																		
Major Individual Giving Program			x	x	x																	
Foundation granting program				x	x		x	x														
Corporate Giving program			x	x	x			x														
Special Events																						
Tournament/gala/something original			x	x	x		x															
TOTAL ANNUAL FUND																						
Admin support, database mgt, etc								x														
Financial reporting						x																
Program/staff evaluation			x	x	x																	
Infrastructure development																						
TOTAL PLANNED GIFTS/BEQUESTS																						