

The Truth about Fundraising Seminar

This is a proposal for funding from the Clayoquot Biosphere Trust to present a 4 day seminar on the basics of fundraising to the catchment area served by the CBT by fundraising trainer and presenter Elizabeth Hume. West Coast Community Resources Society will administer the funding and work in partnership with other non profit organizations on the West Coast. The sessions will be free of charge to the participants.

Objective:

To provide fundraising knowledge and tools to non-profit organizations on the West Coast of Vancouver Island in 4 sessions held monthly in the local area. We believe that the skills learned will enable more non-profits to engage in fundraising and in doing so will be able to provide improved services to the West Coast community. In addition this will be an excellent opportunity for networking and learning more about each other as well as exploring ways we can work together. While the West Coast Community Resources Society will take overall responsibility for administering the funds we aim to work with other organizations to promote and host the sessions.

The Truth about Fundraising is.....

Fundraising at its most basic is an undertaking of people, trust and mission. By our actions, we earn the trust that the money donors give will be wisely used to carry out a mission they support. It doesn't take a genius to raise money. Successful fundraising depends on a combination of common sense, hard work, preparation, courtesy, commitment, enthusiasm and understanding as well as a passionate belief in what you are asking others to support. There are time tested and basic strategies that define successful fund-raising. And they are basic, not simply because they work, but because, quite simply put, if you do nothing you will get nothing.

At the end of the day, we raise money from people who can afford to give and believe in the benefit of what we are doing. They would not have given unless we had asked and most importantly they receive appreciation and respect for their gifts

There are no shortcuts or instant results, but the basics of fundraising are not hard to understand, and nearly anyone who is motivated can benefit from the training being offered in this four day seminar.

The Truth about Fundraising Seminar

Is designed to give attendees the basic information they will need to embark on strategic and effective fundraising. It is intended for small to medium size non profits with little or no fundraising experience, budget or staff, who would like learn how to get started with 'annual fund' fundraising The sessions can be held monthly.

It is highly recommended that wherever possible, an organization should send two participants so they can work together and share ideas unique to their circumstances.

Seminar Key Elements

These are subject to change/revision depending on the needs of the group. A pre-seminar questionnaire will be sent to all participants in order to create the most effective sessions.

Session one

- Assessing your organization's readiness for fundraising
- The role of the non profit Board of Directors
- How Board Members can become effective fundraisers
- The necessity of a fundraising committee
- The Mission Statement checklist
- The Annual Fund and how it differs from Capital and Endowment
- Stocktaking (resources and capacities)
- Awareness raising is your first step - DRIP
- Hiring professional consultants or staff
- Fundraising budgets and goal setting
- Establishing aims and objectives
- Why you must plan, plan and plan some more
- The essential elements of a fundraising plan

Homework: produce an outline of your organization's aims & objectives/determine if your Mission works, if not, propose changes and bring to the next session.

Session Two

- Review the homework exercises and share your aims and objectives and mission statement
- Messaging and developing a case for giving
- Write your own case for giving
- Building donor loyalty and the importance of being donor 'centric.'
- Fundraising ethics and donor's bill of rights
- Types of campaigns – which is right for your organization?
Individuals, corporate sector, foundations and special events
- Marketing communications for fundraising – brochures, newsletters, and more
- How to develop effective campaign materials no matter what your budget
- Awareness and profile raising – events and other tactics

Share your case for giving with your organization. Then come up with 10 key facts about your organization – involve all stakeholders – collate the results and bring to the next session

Session Three

- Review homework and share the results of your 10 key facts determine if you should rewrite your case for giving
- Thinking outside of the box for smaller isolated communities
- Using your aims and objectives draft your fundraising plan
- Funding sources and prospects
- Research, research, research
- Who should ask for the gift

- Methods of asking – in person, direct mail, letter, telephone or at an event and the effectiveness rating of each
- Presentation methods and materials, how to ask for a gift
- Role playing – asking for money

Homework: prepare a presentation to your assigned ‘prospect’ using what you have learned so far. Share your draft fundraising plan with your organization and ask for feedback

Session Four

- Review homework
- Presentations and feedback
- Role playing
- Down the road – the best time to launch in to Major Gifts or a Capital Campaign, how to protect your annual fund and not overuse your donors
- Planned giving – the highest level of donor commitment
- Fine tune your plan
- Working together – what happens when we unite in our efforts?
- Questions and wrap-up

Costs:

Venue	\$ 500.00 x 4 sessions	2000.00*
Lunches, refreshments	\$ 100.00 x 4 sessions	400.00*
Administration/promotional costs		1000.00
Professional Fees		4,200.00 plus GST

Includes travel expenses, seminar materials and all handouts

*WCRS and participating organizations take turns hosting the sessions and will seek in-kind support in the form of a donation of space for a venue, as well as lunches and refreshments.

Total amount requested from CBT \$5000.00

About the Trainer:

Elizabeth Hume,
Fundraising & Marketing Professional
Consulting, Training, Strategic Planning for Non-Profits
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Elizabeth is a fundraising and marketing professional with seventeen years of experience

working with non-profit organizations in the USA, the United Kingdom and Canada, including the past three years as Resource Development Manager with Haven Society in Nanaimo where she was responsible for Public Education and Fundraising. Prior to joining Haven Society, Elizabeth was Head of Fundraising for the Royal Liverpool Philharmonic in Liverpool, England; Marketing and Fundraising Manager for Manchester Camerata in Manchester, England and Director of Development & Marketing for the Sioux City Symphony in Sioux City, Iowa. She has achieved ambitious income targets by developing and implementing fundraising and marketing strategies which include direct mail, telephone campaigns, public relations, profile raising, audience development, cultivation, relationship building, stewardship, special events and more. She creates a culture of ownership within the organizations by involving staff, Board members and volunteers in the effort and encourages them to give of their time and talents.

Summary of key strengths & skills

- Successful track record in achieving significant income results using a combination of individual, corporate and foundation giving
- Audience development and marketing for arts & presenting organizations
- Strategic planning for fundraising and marketing
- Events planning and management
- Building donor management systems and appreciation programs
- Producing effective printed materials, brochures, newsletters and more
- Training and mentoring fundraising staff & volunteers
- Volunteer recruitment, management and training
- Building effective and meaningful relationships with donors
- Creating unique fundraising campaigns
- Producing successful fundraising and cultivation events
- Highly effective communicator and public speaker

Elizabeth is a current member of the Association of Fundraising Professionals (AFP) and a former member of the Institute of Fundraising, UK. She holds an Advanced Certificate in marketing from Chartered Institute of Marketing. She participated in the National Arts Fundraising School - United Kingdom and has received Professional Development Training with the American Symphony Orchestra League. Her current clients include:

West Coast Community Resources Society, Ucluelet
Nanaimo Conservatory of Music, Nanaimo
Haven Society, Nanaimo
War Resister Support Group, Nanaimo

Thank you for your time and consideration. If you have any questions please don't hesitate to contact Candice MacDonald at WCRS.