



SELF-SUSTAINING SUMMER SURVIVAL STRATEGIES
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Strengthen your charity's profile

- ▶ Collect success stories and testimonials
- ▶ Provide board members and volunteers with a one page "cheat sheet"
 - Boast-worthy accomplishments
 - Mission-grounded information
 - Easy-to-remember facts
 - Tied to the strategic plan and case for support

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Support good governance

- ▶ Ensure the board has the necessary tools to succeed as leaders (doesn't have to be staff-driven but guidance is good)
 - Job descriptions
 - Clarify, document and review roles and responsibilities annually
 - Skills inventory for strategic recruitment
 - Informative orientation and annual re-orientation plan

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Support good governance

- ▶ Ensure they have the necessary tools to succeed as leaders
 - Coordinate a buddy system for newcomers
 - Board evaluations to identify areas for improvement and training opportunities
 - Review policies and identify gaps (e.g.) gift acceptance, bequests and other FR-related

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Help board be effective fundraisers

- ▶ Communicate expectations *prior* to recruitment
- ▶ Identify member's strengths and aptitudes and match them to the wide variety of tasks involved in "fund development" – asking for gifts is a fraction of where you need help!
- ▶ Provide them with the training they need to succeed

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Help board be effective fundraisers

- ▶ Teach them the difference between a prospect and a suspect and how to identify individuals (primarily) with shared values
- ▶ Create templates for simple reporting back and forth
- ▶ Share the excitement when donations arrive and praise people's involvement

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Be strategic with your time

- ▶ 80% of the money comes from 20% of the donors
- ▶ Organize and capitalize on your database to ensure you (and your board) know the charity's top 10, 25, 50+ donors
- ▶ Map out strategy to cultivate and strengthen your major gift donors' commitment
- ▶ Build the loyalty of your mid-level donors

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Review systems

- ▶ Organizational, board, volunteer committee structures and reporting
- ▶ Gift acknowledgement and donor stewardship
- ▶ Filing
- ▶ Database management procedures
- ▶ Prospect tracking

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Review policies

- ▶ CRA's Fundraising Guidance
- ▶ Gift acceptance
- ▶ Planned gifts
- ▶ Endowment
- ▶ Prospect research
- ▶ Gifts-in-kind
- ▶ Gift clubs

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Review communication tools

- ▶ Marketing materials
- ▶ Fundraising brochures
- ▶ Newsletters

Do they all contain a "call to action" and list your charity's registration number?

- ▶ Donor reply forms
- ▶ Pledge forms
- ▶ Letters of intent

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Evaluate progress

- ▶ Measure fundraising ROI (return on investment) and report to the board
- ▶ Know who's supporting your charity
 - Repeat donors (last year and this)
 - Increased donors (last year and more this year)
 - First time donors (new or not in past 5 years)
 - LYBUNTS (last year but unfortunately not this)
 - SYBUNTS (some year but unfortunately not this)

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Maintain database integrity

- ▶ Ensure that incorrect addresses are blocked from additional mailings
- ▶ Try to update your files by searching whereabouts of donors who've moved
- ▶ Cross-train one staff person on database entry, management and report generation

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Prep for FR Report (at year end)

- ▶ Data on gifts
- ▶ Data on donors
- ▶ Summary of FR Methods/Programs
- ▶ Budget issues
- ▶ Personnel issues
- ▶ Key accomplishments
- ▶ Key challenges or disappointments
- ▶ Recommendations

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Resources:

- ▶ Board Development - <http://culture.alberta.ca/bdp/bulletins/rolesresp09-print.pdf>
- ▶ Encouraging Fundraising-Savvy Boards - <http://www.charityinfo.ca/articles/Encouraging-fundraising-savvy-boards>
- ▶ CRA Fundraising Guidance - http://www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/cgd/fndrsng-eng.html?utm_source=charities&utm_medium=eml
- ▶ How to Count Fundraising Costs - https://charityvillage.com/Content.aspx?topic=how_to_count_fundraising_costs&iast=42
- ▶ Evaluating Your Special Events - https://charityvillage.com/Content.aspx?topic=how_effective_are_your_special_events

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