



Strategies for Fundraising: Sustaining Heritage, Museums, and Arts & Culture Organizations

A Two-Day Workshop in Charlottetown, PEI

Facilitator: Judy Oberlander, Judy Oberlander and Associates Inc., Vancouver BC

SOLD OUT in 2012 and 2013. Back By Popular Demand!

Increase your organization's capacity to fundraise through this interactive workshop.

Dates: Wednesday, October 1, 2014 (9:00am - 4:30pm) to Thursday, October 2 (9:00am - 4:00pm)

Location: Confederation Centre of the Arts, 145 Richmond St., Charlottetown, PEI

This two-day intensive workshop is designed to increase your organization's capacity to fundraise using a variety of tools and strategies. The links between your mission, marketing and communication strategies, and ways to engage your board, community leaders and constituents will be explored. Lectures, case studies and interactive group discussions are woven together to encourage participants from large and small communities across Canada to share their experiences in cultural organizations.

Workshop Objectives:

- recognize the importance of fundraising within the strategic vision of arts, culture, museums and heritage organizations;
- outline the components of a fundraising plan;
- provide tools and strategies for future fundraising activities;
- link fundraising, marketing and communications; and
- engage staff and board members in planning for both short and long term fundraising activities.

Who Should Attend?

Past workshop participants have come from every Canadian province and the Yukon. They have represented boards and management from municipalities, museums, arts councils, heritage organizations, film festivals, colleges, First Nations cultural centres, tourism associations, and art galleries.

This workshop will be of special interest to both staff and board members of heritage, arts + culture organizations—both large and small, as well as cultural planners, historic site managers, and community leaders responsible for raising funds to sustain the operation and growth of their organizations including museums and historic sites, arts and cultural facilities, festivals, and heritage conservation organizations.

What Past Attendees said:

"Judy demonstrated outstanding preparation by researching the class, both our names and the nature of the groups/projects we represented. She was fully immersed in the course and the group. All in all, it was such a helpful (and comfortable) experience that I would be hard pressed to improve on it."

"The course gave me tools and focus. A stronger understanding of board obligations and working with them. I'm now excited about implementing a plan!"

"Excellent, fundamental knowledge and fundraising leads."

“This workshop broadened my understanding of the creative ways to fundraise and network with others – marketing and communications strategies to reach a wider audience.”

It was all good, including listening to the advice from other participants. Judy’s lovely balance with going with the needs of the group and the need to deliver on the agenda she had promised. I’d take it again! We need all the help we can get.

Registration Fee: (space limited, register early)

- **Early Bird (before July 17, 2014)**
 - \$265 for HC Members those registered for the National Trust Conference 2014
 - \$295 for those not registered for the National Trust Conference 2014
- **Late Registration (after July 17, 2014)**
 - \$295 for HC Members those registered for the National Trust Conference 2014
 - \$325 for those not registered for the National Trust Conference 2014

Fee includes electronic resource materials and light refreshments at all breaks. Lunch will be on your own at nearby eateries. Payment due upon registration.

Language of Delivery: English with discussions in English and French. (The facilitator will be happy to field questions in either language, and will work to find ways to have bilingual discussions in smaller groups.)

Facilitator: Judy Oberlander (Judy Oberlander and Associates Inc., Vancouver BC)

Judy Oberlander creates fund development plans, designs education programs and serves as a fundraising coach to help museums, arts & culture and heritage organizations thrive. She received her Master’s Degree in Historic Preservation from Columbia University and a Certificate in Fundraising from New York University in 2007. She is committed to continuing education having completed the Institute for Corporate Directors’ Governance Essentials Program for Directors of Not-for-Profit Organizations in 2009 and the Certificate in Nonprofit Board Education from BoardSource in 2014. She has worked in the public, private and non-profit sectors in Ottawa and Vancouver including cultural planning and heritage conservation projects over the past 30 years.



Photo: Mark Wexler

She was the founding director of Simon Fraser University’s City Program and also teaches mid-career courses on heritage conservation and urban revitalization at SFU and UVic. Her curriculum development work has been recognized with two national Awards of Excellence from the Canadian Association of University Continuing Education and three City of Vancouver Heritage Awards. Civic participation is important to Judy—she has served on numerous boards including, The Leon and Thea Koerner Foundation; Pacific Parkinson’s Research Institute; Jewish Federation of Greater Vancouver; Association for Preservation Technology; ICOMOS Canada as well as the Development Permit Board Advisory Panel and the City Planning Commission in Vancouver and the Heritage Commission in Ottawa

Workshop Outline

Wednesday, October 1, 2014

- 9:00 **Welcome + Introductions of all the participants**
- 9:15 – 9:30 **Role of Fundraising**
- Raising money today and in the future
 - The new “normal”—the economy and its impact on cultural organizations
 - Fundraising and “friend raising”
- 9:30 – 10:30 **Fundraising 101: An Overview**
- Why do people give?
 - Types of gifts
 - Who are your potential donors?
 - Donations vs. sponsorships; CRA regulations
 - Fundraising strategies, e.g. special events; annual campaigns; capital campaigns; endowments; challenge grants; planned gifts; major gifts; face-to-face solicitations; direct mail; on-line fundraising; uses of facilities and capital assets
 - Roles and responsibilities; ethical considerations
 - What does “organizational readiness” involve?
 - Collaboration within a community: public, private + non-profit sectors
- 10:30 – 10:40 **Question and Answer Session**
- 10:40 – 10:50 **Break**
- 10:50 – 11:45 **The Gift Cycle and its Importance in Fundraising**
- 11:45 – 12:15 **Fundraising Tools**
- What is the role of a fundraising plan? What does it contain?
 - Human resources: staff and board roles; the fundraising committee
 - How to reach out to donors; who reaches out to donors?
 - Role of technology: e.g. tracking donor information; stewardship; on-line giving
- 12:15 – 12:30 **Fundraising Ethics: A Case Study Discussion in Small Groups**
- 12:30 – 1:30 **Lunch**
- 1:30 - 2:00 **A Case Study Discussion in Small Groups: Debrief on the Ethics Case Study + How it might apply to your organization**
- 2:00 – 3:00 **Planning for Fundraising**
- What are the organization’s strategic goals? Where does fundraising fit?
 - Identify practical considerations---what is the starting point for your fundraising program?
 - Create a Fundraising Plan
 - Select fundraising strategies to meet current and future goals
 - Organizational readiness for fundraising
- 3:00 – 3:15 **Break**
- 3:15 – 4:15 **Setting Organizations Up for Fundraising Success—The Need for Human, Financial and Technological Resources**
- Roles of the Staff, Board of Directors, volunteers, “friends” of the organization
 - Invest in fundraising in order to help an organization grow
 - What is your “return on investment”?
- 4:15 – 4:30 **Concluding Discussion + Questions and Answer Session**

Thursday, October 2, 2014

- 9:00 **Opening discussion: questions from the previous day and the readings**
- 9:15 – 10:30 **Links between Fundraising, Marketing and Communications**
- Communicate your message and create a network with other organizations, e.g. local businesses; local + regional governments; tourism operators; schools, NGOs, Chamber of Commerce; local media; elected officials; donors, foundations
 - Find “champions” to spread the word in the community; share stories
 - Build the “case” for fundraising
 - Website design and ways to increase fundraising effectiveness
- 10:30 – 10:40 **Discussion - Question and Answer Session**
- 10:40 – 10:50 **Break**
- 10:50 – 11:30 **Donor Stewardship**
- Roles and responsibilities of donor stewardship depending on the type of campaign
 - Donor recognition: expectations from individuals, corporations, foundations, governments
 - Tools and techniques to encourage on-going donor support
 - What motivates your donors?
- 11:30 – 12:15 **Engaging Boards in Fundraising**
- Recruitment, leadership and governance
 - Roles and responsibilities of boards in relation to fundraising
 - Ambassadorial role in the community
 - Developing policies to support fundraising activities
- 12:15 – 1:15 **Lunch**
- 1:15 – 2:15 **Social Media and its Role in Fundraising**
- Recent trends in social media
 - Creative ways to engage your audiences across the generations
 - Where does technology fit?
 - What strategies has your organization used?
 - A success or not?
- 2:15 – 2:50 **Looking Toward the Future: Developing Your Team**
- An overview of the current Canadian philanthropic climate and its impact on culture
 - Communicate with your constituencies+ build relationships
 - Board and Staff collaboration
 - Listen to your donors
 - Analyze fundraising activities: “take stock” + evaluate each activity
- 2:50 – 3:00 **Break**
- 3:00 – 3:30 **Resources for Future Reference: Publications and Websites**
- Readings—discussion + questions
 - On-line resources
 - Webinars
 - Fundraising networks
 - Next steps for your organization
- 3:30 – 4:00 **Concluding Conversations and Workshop Evaluations**

To Register:

Please go to the National Trust Conference 2014 website and select registration:
<https://www.heritagecanada.org/en/resources/conferences>

Conference Information:

This workshop is mounted in conjunction with the [National Trust Conference](#), the largest heritage conservation conference in Canada. In 2013 it attracted over 400 participants from across Canada from a wide range of backgrounds: heritage advocates, museums volunteers, heritage professionals and architects, municipal planners, academics, real estate developers and the construction industry.

About Heritage Canada The National Trust:

Created in 1973, Heritage Canada The National Trust (HCNT), formerly the Heritage Canada Foundation, is a national charity that inspires and leads action to save historic places, and promotes the care and wise use of our historic environment. Our sites, projects and programs enhance community and quality of life and inspire Canadians to identify, conserve, use, celebrate and value their heritage buildings, landscapes, natural areas and communities for present and future generations. Learn more at: <http://www.heritagecanada.org/>

Cancellation Policy:

A written request for a refund must be received by September 15, 2014. A \$50 administration fee will apply. Refund requests should be directed to: conference@heritagecanada.org

Disclaimer

The Heritage Canada The National Trust reserves the right to substitute the course instructor, provide an alternate course outline or workshop location, or cancel the event entirely (with full refund to registrants) owing to unforeseen circumstances.