



Strategies for Fundraising: Sustaining Heritage, Museums, and Arts & Culture Organizations. (Two-Day Workshop)

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

Increase your organization's readiness and capacity to fundraise through this two-day interactive workshop. Space limited. Register early!

Dates: Wednesday October 10, 9:00am - 4:30pm / Thursday, October 11, 9:00am - 3:00pm

Location: St. James the Apostle Anglican Church, 1439, rue Sainte-Catherine Ouest, Montreal, QC

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 designed to encourage participants to share their experiences and encourage future learning will take place over the two days.

What Past Participants Say:

"Definitely opened my eyes to where to start, how to organize and carry out a successful fundraising strategy."

"Provided a greater understanding of the roles and responsibilities of staff and board members in fundraising. Useful and direct instruction from Judy was well-paired with great class discussion and exercises which helped to further think on issues and raise questions."

"Learned new tools and ideas and trends in donors, boards and fundraising generally."

Key Topics:

- fundraising tools
- the role of a fund development plan
- marketing, communication + social media strategies and how they support fundraising
- ways to engage board members, staff and volunteers in fundraising
- donor stewardship
- an overview of fundraising ethics
- organizational readiness including human, financial and technological resources to ensure fundraising success
- development of strategic partnerships between the public, private + non-profit sectors
- trends in philanthropy in the arts, culture and heritage sector

Who Should Attend:

This workshop will be of special interest to staff and board members of heritage, arts, and culture organizations, 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.

Fee: Early Registration (on or before September 10th):
\$ 265 for those registered for the National Heritage Summit
\$ 295 for those not registered for the Summit

Late Registration (after September 10th):
\$ 295 for those registered for the National Heritage Summit
\$ 325 for those not registered for the Summit

Includes electronic resource materials, all breaks, and one lunch. 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 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. As well, she completed the Institute for Corporate Directors' Governance Essentials Program for Directors of Not-for-Profit Organizations. She has worked in the public, private and non-profit sectors in Ottawa and Vancouver including cultural planning and heritage conservation projects.



She was the founding director of Simon Fraser University's City Program and also teaches mid-career courses on heritage conservation and urban revitalization. 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, the Pacific Parkinson's Research Institute, Jewish Federation of Greater Vancouver, Association for Preservation Technology, ICOMOS Canada and civic commissions in Ottawa and Vancouver.

Workshop Outline:

Wednesday, October 10, 2012

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| 9:00 | Welcome + Introductions of all the participants |
| 9:15 – 9:30 | Role of Fundraising <ul style="list-style-type: none">• Raising money today and in the future• The new “normal”—the world economy and its impact on cultural organizations• Fundraising and “friend raising” |
| 9:30 – 10:30 | Fundraising 101: An Overview <ul style="list-style-type: none">• Why do people give?• Types of gifts• Who are your potential donors• Donations vs. sponsorships |

- Fundraising strategies, eg. 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

10:30 – 10:40 **Questions 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 does this 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?
- Creating a Fundraising Plan
- Selecting the fundraising strategy 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
- Investing 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 11, 2012

9:00 **Opening discussion with 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
- Website design and ways to increase fundraising effectiveness
- Building the “case” for fundraising

- 10:30 – 10:40 **Questions 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
 - Policy development for fundraising activities
- 12:15 – 1:15 **Lunch**
- 1:15 – 2:00 **Social media and its Role in Fundraising**
- Recent trends in social media
 - Creative ways to engage your audiences across the generations
 - Strategies your organizations have used – interactive discussions
- 2:00 – 2:30 **Goal Setting and Measuring Success**
- Current philanthropic climate and its impact on museums, arts & culture and heritage organizations in Canada
 - Communicate with your constituencies+ build relationships
 - Listen to your donors
 - An on-going analysis of fundraising activities: “take stock” and evaluate each activity
- 2:30 – 2:50 **Resources for Future Reference: Publications and Websites**
- Readings—discussion + questions
 - On-line resources
 - Webinars
 - Fundraising networks
- 2:50 – 3:00 **Concluding Discussion**

To Register: Please go to the 2012 National Heritage Summit website at <http://www.heritagecanada.org/en/resources/conferences>