
Fundraising Strategic Plan

prepared for

Big Brothers Big Sisters of Canada
National Office
Burlington, Ontario

April 2005

Executive Summary

In January 2005, DVA *Navion* began working with Big Brothers Big Sisters of Canada to undertake a Fundraising Strategic Plan. The primary goal of the Fundraising Strategic Plan was to survey internal stakeholders and selected partners about plans to generate significantly more fundraising revenue across the Big Brothers Big Sisters' movement in order to meet the service goals outlined in the National Strategic Plan.

Working with a Steering Committee comprised of members of the National Board of Directors, National Staff, and Agency Executive Directors, planning commenced immediately in January. The first objectives were to fine-tune the design of the review process, develop the tools to gather data, develop the personal and focus group participant list and timeline.

Four phases of consultation were incorporated into the design of the Fundraising Strategic Plan:

- Focus groups in six regional centres across Canada to engage member agencies;
- An online survey geared to agency Executive Directors and their Boards;
- Personal interviews with members of the National Board and National Staff, and
- Personal interviews with current partners and sector opinion leaders.

As a result of the consultation process, 89 agencies completed the online survey, 30 personal interviews were conducted and over 60 agency staff provided feedback during the focus group sessions. A variety of themes emerged, a sample of which follows.

Agency Themes

- Agency Executive Directors are spending more time on fundraising than delivering service. This is seen as a drain on their time and is having an impact on service delivery. Many caseworkers have to focus on fundraising during peak special event times.
- Bowl for Kids Sake is a crucial source of cost-effective revenue for most agencies. Large agencies (revenue of more than \$150,000) report a cost-per-dollar-raised of \$0.21 and the small to mid-size agencies (under \$150,000 in revenue) report even better fundraising costs at \$0.19 per dollar raised. Non-BFKS events cost about \$0.46 to \$0.48 to raise a dollar. It is clear that growing Bowl for Kids is a more effective strategy than attempts to undertake new events.
- Most agencies also undertake a variety of other special events. The common finding associated with these activities is that they require intensive staff and volunteer effort and result in much higher fundraising costs / lower net.
- Volunteer recruitment and retention for fundraising is a significant issue.
- Boards that have a track record of giving within BBBS have a few things in common – the job description for Board Members suggests personal giving is part of the responsibilities

and a member of the Board has become a champion for personal giving.

- Growing the Bowl for Kids Sake event into a true signature event across Canada is seen as a very exciting opportunity for most agencies. The AIM Trimark partnership is also seen as a very positive step and many agencies are receptive to the branding, share of resources and cost savings that will result from this partnership.
- The larger agencies across Canada appear to have more sophisticated fundraising programs in place, are more likely to describe themselves as having a Fundraising Board in place and have a balanced array of annual activities (not just focused on special events). However, these agencies are also more likely to have a dedicated fundraising professional on staff.
- 87% of the on-line survey respondents rate their local reputation as good to excellent.
- In terms of potential growth in fundraising revenue, 86% of the on-line respondents believe they can raise two times the funds they are currently raising over time in order to meet the service goal laid out in the National Strategic Plan.

National Themes

- Current donors are very pleased with their relationship with the National Office, have a strong belief in the mission of BBBSC and support the manner in which the mission is carried out. BBBSC is seen as spending money prudently and effectively.
- The National Office is seen as doing an excellent job at developing new partnerships that support many agencies and there is a strong desire for National to do more in this area.
- While National has done some work in the area of planning, and in particular related to Alumni and the Annual Plan, it needs to do more work related to Fundraising Strategic Planning, better communicate its plans and be more diligent at follow through.
- The National Fundraising Policy strives to keep peace between national and the agencies, however, does not support a collaborative effort that will be needed for fundraising success.
- There is strong support for the Alumni Program and most agencies believe this is an appropriate project for the National Office.
- 98% of the on-line survey respondents rate the national reputation of Big Brothers Big Sisters as good to excellent.

Fundraising Strategic Plans

To chart a roadmap for increased sustainability for agencies and the National Office, DVA *Navion* has recommended that agencies refocus energies over time to a balanced portfolio of fundraising programs. In essence, it is recommended that agencies limit special events to two or three per year and focus on more individual giving programs and third party events.

For the National Office, the focus is to move into the area of major gifts and corporate partnerships in a more thorough and methodical fashion and increase its support of agencies specifically to increase fundraising capacity. To meet this dual thrust, National will need to invest in two new fundraising professionals over the next two to three years.

The DVA *Navion* team has thoroughly enjoyed working with Big Brothers Big Sisters of Canada and hope that our work with you and recommended course of action will lead every agency to increased sustainability and increased ability to serve more children. On a final note, for a national federated organization, BBBSC and its member agencies function as a strong team. With the spirit of cooperation and a National Strategic Plan to inspire individuals, we are very optimistic about your future.

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- Focus Group Notes by Region
- Online Survey Comments by Agency Revenue (under \$150,00 and over \$150,000)

Project Deliverables

The Request for Proposal clearly defined seven objectives for the National Strategic Plan. These are:

1. Audit current national and member agency fundraising activities and initiatives. This must be done with sensitivity to the diversity of member agencies in terms of fundraising capacity and opportunity.
2. Recommend a “fundraising vision” for member agencies to significantly increase the funds they raise on an annual basis in order to achieve the Strategic Plan. This might include, for example, recommendations on the percentage and dollar value of funds to be raised nationally through various programs as well as the percentage and dollar value of funds to be raised locally.
3. Recommend how the national office can support member agencies to achieve their fundraising goals.
4. Recommend a “fundraising vision” for the national office to significantly increase the funds it raises on an annual basis in order to achieve the goals of the Strategic Plan.
5. Provide a detailed three-year plan which links together the fundraising visions described above. The plan should include the key areas of focus for the member agencies and the national office, along with concrete steps and a timeline that will move us toward achieving the plan.

The recommendations with respect to the fundraising vision and three-year plan will take into account the following:

- opportunities for enhancing existing fundraising activities
 - recommend new fundraising opportunities
 - recommend the role of the national office in assisting member agencies to achieve fundraising goals
6. Recommend changes, if necessary, to the National Fundraising Policy.
 7. Conduct a three-hour session at BBBSC’s National Convention for member agencies on how to develop their local Fundraising Plan and provide an overview of the findings and recommendations of the national Fundraising Strategic Plan (the outcome of this proposal).

The following Report is divided by sections addressing each of the first six deliverables. The final deliverable will be provided at the BBBSC convention in June.

Section One – National and Member Agency Audit

National Fundraising Audit

Strengths of the Current Fundraising Programs

Based on a number of interviews and observations, we believe that Big Brothers Big Sisters of Canada (BBBSC) has many noteworthy strengths. These are outlined below.

- Current donors are very pleased with their relationship with the National Office, have a strong belief in the mission of BBBSC and support the manner in which the mission is carried out. BBBSC is seen as spending money prudently and effectively.
- The National Office is seen as doing an excellent job at developing new partnerships that support many agencies and there is a strong desire for National to do more in this area.
- In terms of satisfaction, the BBBSC partnership donors we met with plan to continue their support. In addition they indicated that stewardship efforts are well received.
- The donor recognition lunch at the convention is seen as the best event of its type in Canada.
- While not considered a direct fundraising activity, there seems to be strong awareness of the Big Brothers Big Sisters brand identity.
- The Board is seen to be comprised of individuals who accept that fundraising is part of their role. However, the Board does not have many members who can “open doors” or make major gifts.
- The CEO is highly regarded as a leader with vision, passion and personality able to lead the organization and provide the “public face” of BBBSC to major funders.
- The idea of a Council of Champions is excellent and is probably the most effective way to engage support from corporate Canada or select individuals.
- Individual staff in the National Office are seen as passionate about the movement.
- There is strong support for the Alumni Program and most agencies believe this is an appropriate project for the national office.
- 98% of the on-line survey respondents rate the national reputation of BBBSC as good to excellent.

Challenges of the Current Fundraising Program

- While national has done some work in the area of planning, and in particular related to Alumni and the Annual Plan, it needs to do more work related to Fundraising Strategic Planning, better communicate its plans and be more diligent at follow through. This Strategic Planning exercise will contribute greatly in this regard.
- The National Fundraising Policy strives to keep peace between national and the agencies, however, does not support a collaborative effort that will be needed for fundraising success.
- The title of Vice-President, Advancement is not seen as appropriate for BBBS. Advancement is a title used primarily within the university sector to bring together alumni affairs, development, and public relations functions.
- Interviewees believe that national has to enhance its expertise and staffing composition to lead to a major expansion in fundraising. This could be addressed through staff development and the addition of a Major Gifts Officer.
- While the Board is moving toward a greater emphasis on generating resources, it is seen to be in need of more “influencers” and a clearer mandate. As one Board member noted “we do not know who we are”.
- National is seen as lacking in some basic procedures and an effective database system.
- In spite of success with major sponsors, national has to be proactive and more strategic including having a clearer sense of who its top prospects are. This would contribute greatly to a foundation and corporate acquisition program that has generated insignificant results.
- The lack of focus on individual donors is seen as a concern – although the Alumni Program is expected to move the entire movement into this area.

Individual Agency Fundraising Audit

With 170 agencies across Canada, a detailed audit of fundraising activities was not practical. However, results from the on-line survey provided good feedback about the variety of activities and programs that are in place across the county. When we analysed these results, a few consistent themes emerged:

- Agency Executive Directors are spending more time on fundraising than delivering service. This is seen as a drain on their time and is having an impact on service delivery. Many caseworkers have to focus on fundraising during peak special event times.
- Despite the significant emphasis on fundraising, the vast majority of Executive Directors and caseworkers are not trained in fundraising.

- Bowl for Kids Sake is a crucial source of cost-effective revenue for most agencies. Large agencies (revenue of more than \$150,000) report a cost-per-dollar-raised of \$0.21 and the small to mid-size agencies (under \$150,000 in revenue) report even better fundraising costs at \$0.19 per dollar raised. Non-BFKS events cost about \$0.46 to \$0.48 to raise a dollar. It is clear that growing Bowl for Kids Sake is a more effective strategy than attempts to undertake new events.
- For large agencies, the United Way is the second largest stream of revenue with virtually no cost attached to it. Agencies need to consider the opportunity cost with the restrictions associated with receiving United Way Support and how this may hamper significant agency fundraising growth.
- Small agencies are more reliant on Bingo as a revenue stream. All agencies report that significant volunteer efforts are required to generate this revenue. With the decline in Bingo revenue and the required intensive volunteer effort, the future of Bingo is at risk. Therefore, agencies need to be thinking of ways to replace this stream of funds.
- Most agencies also undertake a variety of other special events. The common finding associated with these activities is that they require intensive staff and volunteer effort and result in much higher fundraising costs / lower net.
- Smaller agencies, in particular, are highly dependent on special events and this is draining human resources.
- Many agencies report that donations and event income are down as a result of the recent appeals for support of the Tsunami crisis. However, this finding is not across the board as some agencies reported that BFKS revenue was up on a year-over-year basis.
- Volunteer recruitment and retention for fundraising is a significant issue.
- Boards that have a track record of giving within BBBS have a few things in common – the job description for Board Members suggests personal giving is part of the responsibilities and a member of the Board has become a champion for personal giving.
- The need to seek sources of sustainable funding is a critical issue facing virtually all agencies. Government support is seen as the way to alleviate funding pressures.
- The United Way is seen as one of the few sources of sustainable funding. As such, there are considerable concerns that a new fundraising thrust across the BBBS movement will cause United Way to reduce its funding and create additional roadblocks for agencies seeking support in their communities. Some United Way Agencies are restricting all corporate asks if there is not an existing established relationship.
- Growing the Bowl for Kids Sake event into a true signature event across Canada is seen as a very exciting opportunity for most agencies. The AIM Trimark partnership is also seen as a very positive step and many agencies are receptive to the branding, share of resources and cost savings that will result from this partnership.

- The larger agencies across Canada appear to have more sophisticated fundraising programs in place, are more likely to describe themselves as having a Fundraising Board in place and have a balanced array of annual activities (not just focused on special events). However, these agencies are also more likely to have a dedicated fundraising professional on staff.
- Only a few agencies are developing individual giving programs. Board giving is not a part of the culture in most agencies and asking Big Brothers or Big Sisters to give is mostly limited to event participation. While there are Little Brothers and Little Sisters throughout the movement that have raised money to help their agencies, this is not perceived as an area of giving to pursue.
- 87% of the on-line survey respondents rate their local reputation as good to excellent
- In terms of potential growth in fundraising revenue, 86% of the on-line respondents believe they can raise two times the funds they are currently raising over time in order to meet the service goal laid out in the National Strategic Plan.

Agency Revenue, Cost and Time Grids

As part of the on-line survey directed at individual agencies, we were able to gather data on the revenues by program and the time spent to generate funds by staff and volunteers. We sorted this information into two broad groups - agencies with revenues under \$150,000 (28 responses) and agencies with revenues over \$150,000 (28 responses).

From Agencies with Total Revenue of Under \$150,000

Blank boxes mean that no data was reported

Activity	Average Amount Raised	# of Responses	High / Low Raised	Average Direct Cost	Cost per Dollars Raised	Average # of Hours	
						Volunteer Time	Staff Time
Bowl for Kids Sake	\$17,313	22	\$37,592 \$6,800	\$3,260	0.19	70	150
Other Special Events	\$13,632	25	\$46,588 \$554	\$6,514	0.48	206	161
Gaming/Bingo	\$41,095	15	\$89,270 \$1,391	\$14,863	0.36	308	47
Government	\$33,131	11	\$55,000 \$2,545	-	-	-	28
Foundations	\$10,131	14	\$40,896 \$300	-	-	-	39
Direct Mail	-			-	-	-	
Third Party Events	\$5,126	11	\$14,750 \$650	\$525	0.10	103	26
Wills/Bequests	\$977	5	\$1,000 \$35	-	-	-	
Corporate Giving	\$6,577	12	\$22,550 \$350	-	-	-	18
Individual Gifts	\$3,018	16	\$11,857 \$100	-	-	-	9
Social Enterprise (like Renew Crew)	\$5,370	6	\$10,000 \$500	\$123	0.02	170	21
Other	\$7,399	20	\$34,794 \$28	-	-	-	51
United Way	\$15,251	19	\$44,500 \$1,333	-	-	-	28

From Agencies with Total Revenue of Over \$150,000

Blank boxes mean that no data was reported

Activity	Average Amount Raised	# of Responses	High / Low Raised	Average Direct Cost	Cost per Dollars Raised	Average # of Hours	
						Volunteer Time	Staff Time
Bowl for Kids Sake	\$42,844	25	\$100,000 \$8,300	\$9,299	0.21	141	298
Other Special Events	\$44,842	25	\$138,000 \$78	\$20,750	0.46	358	436
Gaming/Bingo	\$60,786	24	\$165,000 \$11,300	\$23,008	0.38	296	92
Government	\$37,121	22	\$154,714 \$3,117	-	-	-	32
Foundations	\$32,884	19	\$184,757 \$1,600	-	-	-	42
Direct Mail	\$7,625	5	\$30,000 \$175	\$833	0.11	-	44
Third Party Events	\$50,274	14	\$583,026 \$500	\$2,740	0.05	40	41
Wills/Bequests	-			-	-	-	-
Corporate Giving	\$22,231	12	\$122,500 \$785	\$2,193	0.10	-	40
Individual Gifts	\$11,568	24	\$42,000 \$1,000	-	-	-	19
Social Enterprise (like Renew Crew)	\$168,830	6	\$706,845 \$450	-	-	-	-
Other	\$26,285	16	\$165,000 \$2,000	-	-	-	40
United Way	\$75,259	23	\$598,187 \$5,500	-	-	15	75

Section Two – Fundraising Vision for Member Agencies

In order to break the cycle of event-dependent fundraising, individual agencies must consider adapting new strategies for generating both fundraising and non-fundraising revenue. While there is wide-spread knowledge that event fundraising elevates awareness, there is also a realization that it redirects staff resources from delivering on the mission, drains volunteer resources and often results in little net return.

Agencies should limit their fundraising activities to two or three events – with one signature event, Bowl for Kids Sake. It is a well-accepted fact that you cannot significantly increase fundraising income simply by conducting more events. The most efficient and cost-effective form of fundraising in terms of revenue is face-to-face solicitation while the least effective is direct mail. Special events fall somewhere in the middle. The way to raise more income is to implement a personal face-to-face giving program directed at service clubs and community groups, local corporations and individuals. The addition of a grant-writing program to select Foundations and government organizations would help to round out an agency's fundraising program.

While recommending these major shifts in fundraising strategy, we recognize that a significant number of agencies will see risks in moving away from an event driven program. We also recognize that to create more of a fundraising culture driven by volunteers and staff seems daunting when faced with challenges to recruit good boards, let alone fundraising boards. If each agency considers how much time it is now spending on event fundraising and redirects that human energy to more productive forms of development, agencies will raise more money, require fewer fundraising volunteers, reduce overall costs and redirect staff energies to serving more kids.

Recommendations

Planning

1. Every agency needs to invest in planning for a revised fundraising program. Key elements of the plan include: a theme for your annual giving program; an annual fundraising target and; an annual Case for Support showing donors why you need support. It will be important that Case information is shared among agencies and a series of template documents should be posted on the BBBSC agency website.
2. Every agency needs to create Donor Recognition Clubs to acknowledge the various giving levels. Again, sharing templates will help to ease the burden of having to create individual giving level plans.
3. In terms of event planning beyond Bowl for Kids Sake, agencies should make decisions about new events based on whether the event type could have growth restrictions

because of the venue format – such as a finite number of lanes for bowling or participants in a golf tournament. It makes great sense to have room to grow events and not have physical limitations such as these.

4. Agencies need to look for granting opportunities to support a dedicated fundraising position and consider a partnership with another agency in order to make a stronger case to a potential funder. For example, granting agencies such as the Ontario Trillium Foundation will make multi-year commitments toward project-based initiatives that promote sustainability.
5. Agencies that do not have a fundraising database need to work with national to explore opportunities. A database is an important foundation in developing a successful fundraising program.
6. To build a stronger relationship with the United Way, every agency that receives this funding should create a Board Liaison position to increase communication and understanding of the BBBS mission and build support towards the agency's growth plan.
7. In order to bring about these changes and to help agencies build a program that is less dependent on special events, we propose that the National Office provide agencies with "inhouse" consulting expertise.

Human Resources

8. Boards of Directors in member agencies need to have a better grasp of fundraising and understand that a strong ongoing individual giving program based on personal solicitation is the best way to develop prospects capable of making major and planned gifts. Publications and special events may inform and educate donors but gifts that make a difference are obtained by building and maintaining personal relationships with prospective donors. Large gifts can be given without this, but they are far less likely.
9. Every agency should create a Fundraising Committee of six to eight members. While this might be easier for large agencies, we believe all agencies need to strive to build a strong volunteer resource pool for fundraising.

The Committee should include the Agency Executive Director, the Chair of the Board, two other Board Members and two members from the community. Appoint a Chair for a one year renewable term. The mandate of the Fundraising Committee is straightforward:

- To identify potential prospects capable of giving \$500 or more per year – these could be sponsorship dollars or charitable gifts
- To undertake the solicitation of 25 to 50 prospects per year
- To implement effective donor stewardship practices

- To oversee the special event functions

Fundraising Strategies

10. The challenge will be in changing the way agencies do business. Over time, they must move away from a focus on special events toward a more balanced fundraising program if they are to grow into a mature fundraising program. Instilling this new fundraising culture will take focused leadership from each Agency Executive Director. Models such as the “Raising More Money” format should be investigated and replicated as ways of altering the mix of fundraising programs towards building an individual giving program.
11. Every agency should create a list of 25 to 50 prospects (or more depending on the size of your agency). These prospects should be visited personally on an annual basis. The list may include service clubs, individuals, foundations (like a community foundation) or local businesses. Each Fundraising Committee member should be assigned to make five visits each year.
12. The most likely donors are those that know you – your Board, volunteers, alumni and sponsors.
13. In order to seek sustainable funding, each Agency must seek multi-year commitments whether that be for event sponsorship or from some of your closest donors.
14. Every agency must adopt the notion that Board giving is fundamental to its fundraising success in the community. Recognize that the amount of the gift is a personal decision, but also understand that it is vitally necessary to ask or you will not receive a gift at all. Seek a Board Champion for your annual fundraising program who will lead your Board campaign. Celebrate Board giving in order to begin developing a culture of giving.
15. Ask your Bigs to consider supporting you beyond their time. Remember that there is a joy in helping an organization you are already committed to.
16. Participate in national’s online initiatives, although relatively new, there appears to be great potential through Friend-to-Friend campaigns to build a base of individual supporters.
17. The Alumni Program is expected to have a positive impact on the delivery of programs across the movement and it is perceived as a way to move into the area of individual giving. While there is good reason to be optimistic, the relationship is not quite the same as that of a university with its alumni. What will help foster a culture of giving is getting your alumni involved in service delivery and fundraising efforts. It is this focus on personal connections that National should be developing in order to reap the hoped-

for financial benefits. However, it must be understood that, from a fundraising perspective, it may take five to ten years for any significant revenue to be generated from this constituency.

18. Promote your agency as an ideal recipient of money generated through “third party” events in your community. Some of these events include bank branches who have golf tournaments, service clubs that host community fundraisers, or store openings. Tim Horton’s and McDonald’s are two well-known organizations that hold regular community fundraising days and look for local recipients. Agencies should contact local franchisees to become part of the Smile Cookie promotion at Tim Hortons and McHappy Days at McDonalds. Remember to set clear guidelines on your own role in any event. The opportunity to create new fundraising days should be investigated both at the National Office and within individual groups of agencies.
19. Stewardship of donors is key to building the annual giving program. One way to engage Board Members who may not be comfortable asking for gifts is to ask them to call all donors of \$100 or more to thank them for their support.

Section Three - What do Agencies want from National?

Individual agencies by-in-large see a growing role for the National Office. Some of the responsibilities are practical and others will be more challenging. The most significant issue facing agencies is the lack of sustainable funding.

Government Relations

Agencies believe that the National Office should continue to take a lead role in the area of government relations and help identify public funds that agencies can apply for. This becomes more difficult at the provincial level where the National Office may not be networked. In this case, provincial strategies driven by the agencies will have to be developed.

Marketing

While the on-line survey found that nearly 98% view Big Brothers Big Sisters as having a good-to-excellent profile, the focus group discussions pointed out the need for continued effort branding the organization and to communicate the need for money and not just volunteers. The reality is that the reputation and profile of BBBS is created at the agency level and reinforced by national marketing strategies. Partnerships, such as the Irving Tissue alliance, are a cost-effective means of promoting BBBS. Additional cause-related marketing partnerships of this sort should be a key component of the Development Strategy.

More National Partnerships

Agencies see a significant role for National in the continued development of partnerships. Agencies in larger communities need to work more closely with National to develop relationships beyond the Toronto market. The challenge will be in easing tensions that exists between National and the agencies when it comes to sharing prospect lists. A clear and detailed prospect clearance system must be established that will address concerns.

Smaller agencies that have not benefited from some of the bigger partnerships, look to National to do more in this area by having money flow directly to them. This will require a continued education process to manage expectations.

Support for a Signature Event

Understanding the need to support marketing efforts across Canada that will result in a significant increase in funding, agencies have expressed support for a national signature event. Although Bowl for Kids Sake is moving toward becoming such a signature event, there appear to be many complications in standardizing the BFKS to achieve this.

Sharing of Resources

A wide variety of excellent fundraising strategies and success stories were shared through the Focus Group sessions. There is an apparent need to share “best practices” across the movement that will help all agencies benefit from other’s experiences. Sharing these great fundraising plans, grant proposals, donor recognition plans, sponsorship packages, etc. through the BBBSC agency website should be part of National’s support to agencies.

Fundraising Training

When asked how the National Office could support individual agencies to increase fundraising capacity, five main areas of beneficial training were identified. These are:

- Developing a Fundraising Strategy
- Developing a Fundraising Board
- Starting a Major Gifts Program
- Developing an Annual Plan
- Cultivation and Solicitation Training

To meet the training needs of individual agencies and recognizing that large agencies may have different needs than small agencies, we recommend that National create an annual training program. The training schedule could offer half-day workshops that address the five issues identified above during the first year. We suggest testing two formats (conference call and face-to-face workshop) to determine the most effective method of implementing this project. Sessions must be run by expert facilitators – either by using an outside fundraising professional or by developing an in-house training expert. Given the costs associated with developing and executing the workshops, we suggest a charging a modest fee for participants to cover National’s direct costs.

Alumni Program

There is strong support for the Alumni Program and most agencies believe this is an appropriate project for the National Office. However, there is a lack of clarity about how alumni giving might eventually filter down to agencies. The issue of allocating income must be clarified so that appropriate expectations are in place.

Sustainable Dollars

Smaller agencies that are struggling to raise operating revenue envision a National Office that is capable of providing sustainable funding. At the point where National is generating enough funds to sustain its own programs and is generating unrestricted funds, the National Board may want to consider providing operating subsidies to financially needy agencies. While this ability may be some years away, management of expectations on this issue is critical.

Section Four – Fundraising Vision for the National Office

As Big Brothers Big Sisters of Canada moves toward meeting the goals of the Strategic Plan, it is clear that the Development Office will have to build a significant fundraising program to deliver on the vision. First and foremost, BBBSBC must see itself as a fundraising organization. It can not be over-emphasized that leadership from the Board and the Senior Management Team will be vital to facilitate some of the necessary changes. In particular they must work hard to shift attitudes in areas where organizational culture will be impacted.

Recommendations

The Development Office must focus efforts for the next three years on the following areas:

Planning

1. In order to begin realizing more significant revenue from fundraising, the Development Office must shift from being reactive (partners selecting you) to being pro-active (putting the building of donor relationships at the core of the organization). To do this, National must undertake a shift in organizational culture that will focus on attracting and developing strong relationships with influential Canadians.
2. Because donors have more choices now than ever before, it is critical to advance the BBBSBC priorities that are relevant to clearly defined audiences. In this climate, the strength of your Case for Support and its ability to strategically target key constituencies through focused fundraising programs are prerequisites to success. With the development of the National Strategic Plan, there is a new opportunity to position your Case as an urgent priority.

One of the first priorities prior to getting any new significant major gift fundraising activity underway is spending time creating your Case for Support. The Case for Support is the document that you use internally to describe why you need money, where the money will be used and who will be impacted by these dollars. From this internal document, you create a series of external documents – like funding proposals, text for your website and brochures.

One of the challenges in creating the fundraising Case for the National Office is that you need to generate support for existing functions rather than for a series of new initiatives. Similar to agencies, you need to attract sustainable funding. To do this, we recommend:

- Putting together a Case that has a three-year vision.
- Focus your Case on the impact investment will have in areas that will appeal to donors – for example, package the accreditation program in a way that show its impact on child safety. Marketing can focus on building public awareness in order

to encourage increased volunteer support etc.

Human Resources - Fundraising Leadership

3. To move into the area of relationship-based fundraising, we recommend the following staff structure with the creation of two new positions. The first will focus on major gifts and corporate partnership development and the second position will be an “In-House Consultant” to work in support of member agencies.

President and CEO	<ul style="list-style-type: none"> • Primary recruiter of the Council of Champions • Participate in the strategy development for all significant new partnerships • Participates on all \$100,000 plus calls • Selective participation in calls under \$100,000
Vice-President, Development <i>formerly named VP Advancement</i>	<ul style="list-style-type: none"> • Leads the strategy development and participates in most calls at the \$25,000 plus level • Identifies new potential corporate donors • Handles a portfolio of 25 prospects at any given time • Provide overall leadership to the Development Office • Sets annual plan, budget, evaluates performance • Supervises three positions (as noted below) • Leads support activities with individual agencies
Director of Major Gifts and Corporate Partnerships	<ul style="list-style-type: none"> • Develops an annual plan for soliciting gifts under \$25,000 • Participates in most calls under the \$50,000 level • Handles a portfolio of 50 prospects at any given time • Resource support for Major Gifts for agencies • Writes all proposals and the annual case for support • Ideally, provide some in-house expertise of planned giving
In-House Consultant	<ul style="list-style-type: none"> • Works with member agencies to identify training needs and then to facilitate the provision of training • Identifies best practices and determines venues for sharing these • Works with individual agencies or in clusters to address fundraising needs • Coordinates a committee of internal and external advisors to enhance member agency fundraising capacity
Fundraising Associate	<ul style="list-style-type: none"> • Implements the Donor Stewardship activities • Identifies new prospects and provides prospect research services • Designs and implements a foundation solicitation program • Manages the direct mail activity • Sources fundraising best practices and materials within the movement and posts documents on the BBSC agency website • Provides guidance on the use of the database system • Handles a portfolio of 25 prospects at any given time at the \$1,000 to \$24,999 range
Director of Alumni	<ul style="list-style-type: none"> • Provide leadership in developing strategies to identify Ambassadors, Champions, opportunities to encourage alumni to volunteer, to reconnect with former Bigs or Littles • Identify corporate prospects for sponsorship and participate in the soliciting process • Develop strategies for maximizing online appeals to alumni members in the one to three year term.
Director of Bowl for Kids Sake (dual marketing and	<ul style="list-style-type: none"> • Works with national corporate partners to encourage and manage employee involvement • Identifies and shares Best Practices with all member agencies

fundraising function)	<ul style="list-style-type: none"> • Develops opportunities for promoting Bowl For Kids Sake nationally • Works closely with the VP Development to seek new sponsors and to leverage existing corporate partners
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4. In terms of the National Board, we support the notion that this Board should consider fundraising as part of its mandate. Without private support, there simply is no National Office. All Board Members must embrace philanthropy as key to delivering the mission. Of equal importance is the recognition that philanthropy is required at much higher levels if the goal of 100,000 children served by 2013 is to be achieved. The current structure, having a Committee of the Board supporting fundraising, is appropriate. However, at the same time efforts must be made to build a Council of Champions that will provide a non-governance role for a more connected, affluent group of individuals.

5. We do not recommend the creation of a separate Foundation at this time for the following reasons:
 - A separate legal entity must be established, with all this entails - bylaws, separate board meetings, minutes, annual meetings, nominations committee, financial statements, preparing tax returns and related documents to governments, etc.
 - While some overlap should exist with members of the parent Board, it will be necessary to recruit and orient another complete group of new Board members.
 - Since there are separate chairs and a number of different members involved in each of the two organizations, there is a risk that the respective missions, goals and objectives can diverge over time. Unless the bylaws of the foundation provide that representatives of the parent body make a majority Board members, it is possible the foundation may make decisions that clash with those of the parent body.
 - Parallel foundations have more stringent disbursement criteria than a charitable organization. The disbursement quota for charitable organizations and foundations is 80% of the receipted donations of the previous year, with some exceptions. In addition, a parallel foundation must disburse, in any year, an amount equal to 4.5% of the value of the investment assets of the foundation.
 - Experience shows that many organizations that established foundations failed to improve fundraising results. Fundraising requires a plan, a commitment from the foundation board to use their influence and affluence in its support, and, where needed, the staff to work in support of the board and volunteers.

6. For the next three years, at a minimum, we recommend the National Board takes greater ownership of fundraising, works to establish a strong in-house support team for major gifts and builds the Council of Champions.

Fundraising Activities

7. Individual major gift giving is on the rise in Canada and this creates an opportunity to

maximize return on fundraising investment. It also increases the importance of institutional commitment to relationship building and the involvement of influential and dedicated leaders. Toward this end, the creation and mobilization of Council of Champions is the single most important activity that will impact fundraising. The challenge for the National Office will be to effectively support these volunteers to ensure a meaningful experience.

8. If revenue generation is to become a top organizational priority, collaboration should become more commonplace between National and the agencies. Encouraging cooperation and a win-win attitude will be especially important.
9. Improve productivity by developing staff competencies. In order to meet the needs of individual agencies and to move into a new area of major giving, the National Office Development Team must become experts in the area of major gifts. A side benefit will be having in-house expertise in the area of planned giving.
10. Develop a more strategic and deliberate approach to corporate giving. To do this we recommend you go through a formal process of identifying the top 50 prospects. This can be expanded by an additional 50 prospects once the new Director of Major Gifts is onboard. Working with a targeted group of 50 prospects will help you focus your communications and relationship building.
 - With the list of top prospects in hand, research profiles must be developed for each. Identify a preliminary rationale for approaching each prospect, identify any linkages (with the National Board, the Council of Champions or individual agencies) and target gift amounts.
 - Assign each prospect to one staff person:
 - President – select \$100,000 plus prospects
 - VP, Development - \$25,000 plus prospects
 - Fundraising Associate - \$1,000 to \$24,999 prospects
 - Develop a brief cultivation plan for each prospect.
 - Track all prospects contacts in your database and require each person to prepare a written contact report after every meeting (or a move – this process is often called moves management) with a prospect.
 - Hold prospect review meetings once every 6 weeks to share, collaborate and increase accountability.
 - Solicit as appropriate.
11. Consideration should be given to developing a nationally supported signature event beyond Bowl for Kids Sake. Depending on the roll out of the AIM Trimark partnership and your ability to engage agencies to come onboard, the Bowl for Kids Sake may become a true signature event. However, BBBSC may want to consider leaving BFKS within the domain of individual agencies and start fresh with a new event.

12. Consider piloting a television-based giving program to develop individual monthly donors, build awareness of the BBBS brand and drive activity to your website to increase e-giving. To do this in a cost-effective manner, the National Office should be seeking and cultivating a formal media partner.

Support for Agencies

In terms of fundraising support for individual agencies, there are a few key areas where National can provide significant value to agencies.

13. Having a single web-based data management system would be an ideal scenario for all agencies and the National Office. As well as the cost saving associated with this system, it provides ease of access to information, a smoother prospect clearance system and other potential fundraising benefits. We understand that National is currently investigating the companies that provide this product and will be bringing forward a strategy.
14. Continue to develop web-based donation opportunities for member agencies.
15. Recognizing that a significant proportion of agencies may be challenged to move away from a special-event driven fundraising program, National can play a critical role to agencies to help them through the transition period. Rather than leaving all agencies to develop their own road map to a more diversified fundraising program, we recommend National hire an “In-House Consultant” (national office employee) whose specific job is to advise selected agencies on how to implement the changes recommended in this report. The consultant could analyze an agency’s current fundraising practices and put in place the tools to a more balanced program. Because the consultant would interact with many agencies, they could facilitate greater sharing of resources and best practices.
16. Providing access to best fundraising practices for agencies is an area where National can provide significant expertise, coordination and value. To meet the training needs of individual agencies and recognizing that large agencies may have different needs than small agencies, we recommend that National create an annual training program. The training schedule could offer half-day workshops that address the five issues identified in the previous section during the first year. We suggest testing two formats (conference call and face-to-face workshop) to determine the most effective method of implementing this project. Sessions must be run by expert facilitators – either by using an outside fundraising professional or by developing an in-house training expert. Given the costs associated with developing and executing the workshops, we suggest a charging a modest fee for participants to cover National’s direct costs.
17. Another strategy for providing access to best practices is to have the National Office take a lead in linking agencies together to share a variety of fundraising materials and new ideas. There is a real opportunity to build the search and collection of best

practices into the accreditation process and as such this should be incorporated into the accreditor-training program. Further development and use of the BBSC agency website to post fundraising resources and to promote the use of these materials is an appropriate way to add value to member agencies.

Other Comments

18. National should not put any additional energy into the direct mail program (in other words keep at your current mailing schedule), special events beyond the golf tournament, telemarketing or planned giving at this time.

Section Five – Three Year Fundraising Plan

National Fundraising Plan

Phase One July 2005 to December 2005		
Activity Area	Actions	Revenue Target
Council of Champions	<ul style="list-style-type: none"> • Complete recruitment • Develop orientation package • Host first two meetings • Identify prospects ~ 10 • Develop cultivation / solicitation plans • Conduct first calls 	
Major Gifts & Corporate Partners	<ul style="list-style-type: none"> • Review existing donor files of \$1,000 or more • Develop renewal and upgrading strategies for above prospects • Create top 50 list of new prospects • Create and mobilize a prospect review committee • Research, create strategy, rate and assign • Create templates for contact, briefing and strategy reports 	
Case for Support	<ul style="list-style-type: none"> • Identify Case priorities • Create a full Case for Support • Test with the Council of Champions • Prepare communications materials 	Not applicable
Staffing	<ul style="list-style-type: none"> • Prepare Job Profile for In-House Consultant to work in support of member agencies • Prepare Job Profile for the Director, Major Gifts and Corporate Partnerships • Budget for hiring two new positions • Host a staff retreat to bring this plan alive • Determine training gaps • Develop training plan 	Not applicable
Operational Support	<ul style="list-style-type: none"> • Identify issues related to donor stewardship, create policies to address issues • Continue investigation of web based database system • Finalize database upgrade by end of year • Develop a budget for the web-based database 	Not applicable
Agency Support	<ul style="list-style-type: none"> • Develop internal networks to gather “best practices” and templates • Create and implement communications strategy to promote this service • Develop plan for sharing through the BBBSC agency website • Create taskforce to revise the National Fundraising Policy 	Not applicable
Annual Giving	<ul style="list-style-type: none"> • Continue with current direct mail program to current donors • Drop corporate acquisition program • Continue with the Golf Tournament 	TBD

	<ul style="list-style-type: none"> • Revise Foundation program and eventually move to the major gifts program • Solicit all board and staff members of National 	
Signature Event	<ul style="list-style-type: none"> • Continue to mobilize BFKS as a national signature event 	Not applicable
New Programs	<ul style="list-style-type: none"> • Seek opportunities to promote e-giving 	TBD

Phase Two January 2006 to June 2006		
Activity Area	Actions	Revenue Target
Council of Champions	<ul style="list-style-type: none"> • Meet with each Champion to build interest and support • Create cultivation event to mobilize contacts • Continue to identify, cultivate and solicit prospects 	\$200,000
Major Gifts & Corporate Partners	<ul style="list-style-type: none"> • Evaluate progress from Phase One • Continue staff coaching and sharing • Increased emphasis on specific “moves” on each prospect • Monthly team prospect review meetings • Increased collaboration with GTA agencies 	Not applicable
Case for Support	<ul style="list-style-type: none"> • No new actions in Phase 2 	Not applicable
Staffing	<ul style="list-style-type: none"> • Recruit and hire Director, Major Gifts and Corporate Partnerships • Recruit and hire In-House Consultant • Provide budget for conference attendance • Increase sharing with BBBSA 	Renewals: Current expectancies: New Money:
Operational Support	<ul style="list-style-type: none"> • Install new database • Training staff • Begin field testing with agencies 	Not applicable
Agency Support	<ul style="list-style-type: none"> • Begin agency training program • Pilot two sessions – one conference call and one face-to-face • Evaluation training sessions 	TBD
Annual Giving	<ul style="list-style-type: none"> • Begin to develop BBBS Alumni solicitation program • Continue with existing programs 	
Signature Event	<ul style="list-style-type: none"> • Continue to mobilize BFKS as a national signature event 	
New Programs	<ul style="list-style-type: none"> • Increased profile to drive traffic to your website 	Not applicable

Phase Three July 2006 to December 2006		
Activity Area	Actions	Revenue Target
Council of Champions	<ul style="list-style-type: none"> • Continue to identify, cultivate and solicit prospects • Add new Champions (ongoing) • Profile Champions as appropriate • Solicit Champions on an annual basis for a personal and corporate gift 	
Major Gifts & Corporate Partners	<ul style="list-style-type: none"> • Increased emphasis on specific “moves” on each prospect • Monthly team prospect review meetings • Increased joint strategies and asks across Canada • Identify additional prospects ~ 50 per phase • Research, cultivation, assign, rate 	
Case for Support	<ul style="list-style-type: none"> • Evaluate, revise and refresh 	
Staffing	<ul style="list-style-type: none"> • Set annual financial goals • Continue to build staff competencies • Evaluate all positions and fine tune 	
Operational Support	<ul style="list-style-type: none"> • Policy review 	
Agency Support	<ul style="list-style-type: none"> • Begin to offer assistance to create annual plans • Offer telephone support (help line) • Increase support and emphasis on major gifts / personal asks 	
Annual Giving	<ul style="list-style-type: none"> • Continue to build data base and begin to add segmentation to the direct mail program 	
Signature Event	<ul style="list-style-type: none"> • Continue to add new sponsors for BFKS 	
New Programs	<ul style="list-style-type: none"> • Investigate new signature event 	

Phase Four January 2007 to July 2008		
Activity Area	Actions	Revenue Target
Council of Champions	<ul style="list-style-type: none"> • Continue to identify, cultivate and solicit prospects • Add new Champions (ongoing) • Profile Champions as appropriate • Solicit Champions on an annual basis for a personal and corporate gift 	
Case for Support	<ul style="list-style-type: none"> • Revised based on progress towards meeting the goals of the Strategic Plan 	
Staff Development	<ul style="list-style-type: none"> • Set annual financial goals • Continue to build staff competencies • Evaluate need to add additional support and revenue generating positions 	
Major Gifts	<ul style="list-style-type: none"> • Increased emphasis on specific “moves” on each prospect • Monthly team prospect review meetings • Increased joint strategies and asks across Canada • Identify additional prospects ~ 50 per phase • Research, cultivation, assign, rate • Add Foundations to major gifts program 	Renewals: Current expectancies: New Money:
Operational Support	As required	
Agency Support	<ul style="list-style-type: none"> • Review progress, survey agencies for additional training needs and new ways to add value 	
Annual Giving	<ul style="list-style-type: none"> • Continue to focus on direct mail, select special events • Increased focus on individuals as trust is built with agencies, alumni program builds momentum and Council of Champions bring forward new contacts 	
Signature Event	<ul style="list-style-type: none"> • Plan for a new signature event 	
New Programs	<ul style="list-style-type: none"> • Increased emphasis on monthly giving • Focused on cost effective fundraising while managing risk in new programs 	

Section Six – National Fundraising Policy

Our impression of the National Fundraising Policy is that it was originally designed to keep peace between the National Office and individual agencies. During the process of gathering data for this report, we asked, through the on-line survey, for suggestions on improvements to the Policy. In fact, we received very few suggestions. The only clear theme that emerged is regarding communication. The following quote captures the communication theme well:

“Communicate more with the agencies. We need to know who you are approaching and for what, before you do it. You need to know who our supporters are and what they are doing for us. If National’s approach to a funder results in an agency losing relied-on support from that funder, the results could seriously affect the sustainability of that agency.”

In terms of our findings, the vast majority of people are not tuned into the Policy. They simply are not bumping into National with their current fundraising activities. It is the larger agencies that need to work in a collaborative fashion with National. This is especially true for agencies in the Greater Toronto Area.

Our recommendations are that a Prospect Clearance Committee be formed to manage the assignment of prospects between National and the GTA agencies. The goal of this committee is to facilitate communication, collaborate on specific prospects, assign prospects and create guidelines for when a prospect may be legitimately moved from one entity to another. For example, if National clearly states it wants to have domain over company X and Toronto also wants company X, it will be incumbent upon both to declare why one should have this prospect. A decision will be made as to who will move forward and, if they do not do so within a reasonable time, the prospect will be moved back into a central pool to be assigned again. What must be avoided is having prospects assigned and no action taken to move that prospect toward making a gift.

As National moves to increase its corporate giving program, it needs to have a clearly defined prospect list and to have that list shared with other interested agencies.

In terms of evolving the National Fundraising Policy, we recommend that the policy not place limits on the National Office in the area of corporate giving but rather it should create a framework for collaboration and a system for prospect clearance.

In terms of individual giving, these prospects are more likely to surface at the agency level at this point in time. In most cases prospects should remain as agency prospects unless National can make a strong case that they can leverage a higher gift or that they can create greater opportunities than the agency can do alone.

Appendices

- Focus Group Notes by Region
 - Online Survey Comments by Agency Revenue (under \$150,00 and over \$150,000)
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Ontario Fundraising Strategic Plan Focus Group #1
Date: Tuesday, March 22nd 3:00-4:30 E.S.T.

1. In your area / province, what are your greatest achievements in the area of fundraising over the last two years?

- snow volleyball tournament (London) has been very successful
- garden tour (Northumberland) has grown exponentially and has created spin-off fundraisers (i.e., BBQ, raffles, “birdhouse boutique”, etc...)
- some agencies receiving Ontario Trillium grants – for service expansion, staff positions, etc...
- Niagara – discussed challenges of several agencies within close proximity and need to work together on funding proposals (agencies need to share resources)
- discussed that communications plan needs to come before marketing
- discussed BBBSC agency website – sounds like it is well used and agencies would benefit from templates (i.e., sample grant proposals)
- Ottawa has been successful with direct mail, personal visits and telemarketing

2. What are your biggest struggles in terms of fundraising?

- Executive Directors spending a lot of time on fundraising – a loss to programming

3. Have you ever asked your “Bigs” to consider supporting you?

Board Members:

- some Ontario agencies appear to have “fundraising boards”
- i.e., Ottawa does not ask board members for a financial donation, but ALL give and they have recently designated a Chair to solicit major gifts
- some board members asked to participate in events (i.e., BFKS)
- some agencies ask people who are interested in joining the board to sit on a fundraising committee first
- there seems to be increasing expectation that board will contribute

Bigs:

- some agencies try to get Bigs/Littles involved in BFKS – not always successful
- some agencies involve Littles in direct fundraising (prize incentives)
- discussed using Bigs/Littles to tell story (i.e., St. Catherine’s emotional video)

4. If you could make one suggestion to national to focus its energies in terms of fundraising, what would that be?

- major gift and planned giving expertise at the national office to spin out materials to member agencies
- lack of annualized dollars – working with all levels of government (and especially provincial and federal government) to get annualized prevention dollars

- desperate need for sustainable funding
- discussed an aggressive campaign to lobby government money – we need this
- perception that public thinks BBBS is government funded
- share success stories of who is doing what in terms of individual giving
- possibly do a national direct mail campaign (with revenue sharing with agencies) to get around United Way's restrictions
- more national partnerships (similar to Cisco, etc...)
- more templates on BBBS agency website would be helpful

Ontario Fundraising Strategic Plan Focus Group #2
Date: Wednesday, March 23rd 9:30-11:00 E.S.T.

1. In your area / province, what are your greatest achievements in the area of fundraising over the last two years?

- some agencies have been successful getting Ontario Trillium grants to fund staff positions
- discussed sharing Trillium proposals within agencies – BBBSC agency website
- discussed sustainability issues with Trillium grants
- some success with BFKS this year – online pledging has increased revenue
- discussed setting goals and importance of planning
- discussed third-party events

2. What are your biggest struggles in terms of fundraising?

- discussed restrictive nature of United Way
- perception that community believes BBBS agencies do not need financial support (national must do more in terms of awareness) – discussed raising profile of organization
- people think we are government funded

3. Have you ever asked your “Bigs” to consider supporting you?

Board Members:

- not generally active in fundraising
- some agencies get board involvement in special events
- people still in the mindset that if they are giving their time, should not give money
- not enough competition/challenge between board members
- some agencies instruct board members to give specific contributions (three times per year – this is an explicit expectation)
- discussed needing a strong board champion for fundraising

Bigs:

- sensitive issue
- hard enough to get Bigs to volunteer their time
- some agencies have participation from Bigs in their special events (i.e., BFKS)

4. If you could make one suggestion to national to focus its energies in terms of fundraising, what would that be?

- resources to help board members understand their fundraising role and the types of fundraising activities beyond special events
- want to raise profile of movement – visibility issue
- we need to become the charity of choice – need to get the message out there

- that agencies need money
 - national sponsors that benefit all agencies in all communities (discussed large grocery store chain, Canadian Tire, car dealerships, Tim Hortons, McDonalds, KFC and prism brands (KFC, Pizza Hut, Taco Bell, etc...))
 - some agencies want another special event pushed from national – similar to BFKS
 - ongoing community awareness campaign – not just Big Brother Big Sister month in September, but year-round
- 5. Is there an area of opportunity for you in terms of fundraising that you wish you could pursue? If so, what is it?**
- Value Village – similar to “Renew Crew” program in B.C.
 - ribbons – on cars – similar to charities do in United States
 - tapping into National Police Force relationship (i.e., RCMP) for support
- 6. Do you have any advice for me as we move towards building a fundraising vision for National and the agencies?**
- agencies want opportunities for local partnerships
 - do not want new mentoring programs – we need money to pay for what we are currently doing
 - conference calls would be very beneficial

Quebec Fundraising Strategic Plan Focus Group
Date: Wednesday, March 23rd @ 2:00 to 3:30 E.S.T.

9 agencies participated in that focus group

The comments and recommendations from that group are the following:

1. In your area / province, what are your greatest achievements in the area of fundraising over the last two years?

Most of them do fundraising except Quebec City. They do not need to do fundraising for the past 5 years because they have financial partners such as United Way (Centraide) and le Ministère de la Santé (Health Minister). Prior to that period, they did 2 activities: golf tournament and spaghetti. People at the phone were stunted 'cause all agencies do fundraising. The agency who collects the most is Greater Montreal's agency who collects 2,4M\$ last year with gifts from individuals, foundations and special events. The second one is West Island ...between 700K and 800K annually. Activities such as: golf tournament, spaghetti, chocolate sales and bowling for the West Island.

All the others around the «table» were collecting between 7 K and 75 K annually more or less with the same type of activities...golf tournament, wine and cheese, bowling, and so on.

All the agencies realize their activities all year except in Sept., Oct. and November during the United Way's campaign. They do not solicit corporations except for sponsorship for special events. The only agency who solicits corporate dollar is Outaouais. In the past years they got from National Bank 15k over a period of 3 years.

2. What are your biggest struggles in terms of fundraising?

Except West-Island, most of the agencies do not have full time development staff. So, the executive director and volunteers are responsible for all development activities. As one individual said the biggest challenge every year is money. Smaller organization spent a lot of time and energy do special events.

Others individuals said that they do need more visibility in Quebec...without that it's gonna be again a big struggle to raise more money...Two or three said that for the past years they told the Nat'l about those needs in publicity, marketing and so on and nothing has been done at this point by the Nat'l.

3. Would a conference call every few months be beneficial to share ideas with your agency colleagues regarding fundraising?

Most of them are OK with this. But they try some years ago to do that but did not work easily. If well organized, let's give it one more try.

4. Have you had success at generating gifts from individuals?

Lot of success with the individuals for Greater Montreal. They start with revenues 2 years ago of 1,5K and they raised 35K this year. For West Island, they don't do mailings for the individuals but they do solicit them through their annual bowling event where everyone is solicit...players, volunteers and so on with a pledge card. Outaouais don't solicit individuals.

5. Have you ever asked your "biggs" to consider supporting you?

It doesn't seem that lot of Quebec agencies are doing this but as West Island told us, "we need to solicit our core mentors...those people are working in business...most of them...they're volunteers with a huge interest for our kids so we will be foolish not doing so...and we didn't feel reluctancy from them to pledge".

Usually, the response is those biggs are volunteers so that's enough...

6. If you could make one suggestion to national to focus its energies in terms of fundraising, what would that be?

I got a number of suggestions (and comments) from Quebec agencies in terms of support or better support from the National office:

- ✓ Improve the quality of French in the documents from the Nat'l office. They got 10 000 French documents (info materials/folder) each year for all agencies and it seems that the quality of French materials is very low with errors in the translation from English to French.
- ✓ All the participants said that the amount of 42 000\$ that the National give to marketing in Quebec is too low for 20 agencies.
- ✓ The National changed some years ago the logo of BBBS and French Canada was not aware of it and the executive directors were not consulted. So, apparently there some agencies still working with the old logo and others use the new one which causes confusion. No uniformity in the branding.
- ✓ Recruit a marketing agent and implement a marketing Plan in Quebec. I got lot of reactions about the visibility of BBBS or the lack of visibility in Quebec. As one participant said "we need mass advertising in this province"
- ✓ A good visibility program in Quebec would facilitate the fundraising capacity of the agencies.

7. Is there an area of opportunity for you in terms of fundraising that you wish you could pursue? If so, what is it?

Two elements were discussed at this point other the usual special fundraising events. The possibility for this province to have a national spoke person such as an artist, hockey player,...that would help the visibility of BBBS and his notoriety. Outaouais and West-Island have local spoke person but a well known national would be

much appreciated.

Second element that we've talked about to improve the revenues is that BBBS needs to build a partnership with a large corporate friend such as Loblaws, Home Depot, National Bank, Desjardins...a national «drawing» for BBBS and each agencies will get a fraction of the revenues.

8. Do you have any advice for me as we move towards building a fundraising vision for National and the agencies?

I got comments and suggestions such as the following:

- ✓ Few of the participants go to Toronto's annual Convention in June mainly because it's too expensive. Having the budget, they would attend the Conference. For those who did assist in the past, they were pleased with the conference. (Note that in Quebec, they do have in November their own national held in French where almost all the agencies is represented.
- ✓ There was **a huge consensus** about the fact that the new goal of 100 000 kids per year by 2013 is unrealistic. Some agencies already got their targets for this year and they say that it was too much. They would need to attain those new objectives more money, more volunteers, more space in some cases to meet the new requirements. The «coupling» scholar program in the past was a success but to meet the new requirements they would need a new program with the national support.
- ✓ Some of the participants would like to have access in Toronto to bilingual staff.
- ✓ **And again, again and again they urge the Nat'l to focus on a marketing plan and more visibility for Quebec province!**

Prairie Fundraising Strategic Plan Focus Group
Date: Wednesday, March 23rd 12:00-1:30 E.S.T.

1. In your area / province, what are your greatest achievements in the area of fundraising over the last two years?

- many agencies reported success with BFKS event – incentives for registration
- discussed Lloydminster's Getaway summer trailer raffle - \$15-20K revenue
- Edmonton has had success developing relationship with government – 50% grants
- discussed problems with sustainability
- some grants require partnering process – can be time consuming
- discussed RBC Foundation grant successes
- Wildrose Foundation – successful in Alberta
- Manitoba Lottery Foundation – you have to work at bingos to get funds
- discussed some success with third party golf tournaments
- discussed some successes from McDonald's "Happy Day" proceeds
- discussed potential of Wal-Mart – seem to be some local success, but not nationally

2. What are your biggest struggles in terms of fundraising?

- lack of sustainable dollars
- people don't understand that we are not core funded – we need to tell story
- discussed restrictive nature of United Way
- have to develop the right message – towards the careful recruitment, screening and monitoring of mentor matches
- unique needs of different agencies – size of agency, size of community – need different strategies for different sized agencies
- smaller agencies not affected by corporate national partnerships (this is a theme that has emerged through all focus groups)

3. Have you ever asked your "Bigs" to consider supporting you?

- doesn't appear agencies are fundraising from Bigs
- find mentors give their time and do not want to give financially
- but, Bigs have "circles of friends" that they can ask for support

Board Members:

- some large differences in board involvement across agencies
- some agencies have "fundraising boards" and others do not

4. Have you ever had success at generating gifts from individuals?

- Calgary has really struggled with this
- nobody has received a planned gift – some have received memorial gifts
- Edmonton trying to create a scholarship fund for Littles

5. If you could make one suggestion to national to focus its energies in terms of fundraising, what would that be?

- fostering relationships with companies in all sizes of communities
- sharing templates – BBBSC agency website – needs to be a LOT more material available
- regional conference calls – would be helpful, but in 2 streams (large and smaller agencies)
- would like to see recognition program templates (i.e., United Way’s donor recognition levels)

6. Is there an area of opportunity for you in terms of fundraising that you wish you could pursue? If so, what is it?

- a child related fundraiser, similar to Jump Rope for Heart would be nice

Atlantic Fundraising Strategic Plan Focus Group
Date: Tuesday, March 22nd 1:00-2:30 E.S.T.

1. In your area / province, what are your greatest achievements in the area of fundraising over the last two years?

- some success with local lottery calendar campaign (lots of revenue)
- success with dinner theatre event
- success with planned giving campaign (Leave a Legacy)
- BFKS and curling events have grown successfully
 - some agencies have found success through hiring a BFKS coordinator,
 - others have increased sponsorships
- discussed that agencies need to diversify fundraising efforts – continually analyzing return on investment
- discussed collaborating and working together on region asks (i.e., Sobeyes)
- some success with local grants from community foundations
- discussed possibilities of corporate sponsorships with Irving & McCain

2. What are your biggest struggles in terms of fundraising?

- amount of time it takes
- on average, Executive Directors are spending between 60-80%+ of their time on fundraising activities (lack of dedicated fundraising staff)
- discussed some success in third-party events (i.e., ATV Poker Rally event)
- no sustainable funding (have to chase new money each year)
- competition in communities with other charities
- “fighting yourself” – constantly having to ask for money and the perception within the community that they are always asking
- community perception that BBBS agencies have money
- lack of fundraising diversity

3. Have you had success at generating gifts from individuals?

- some board members give money – but many are not directly asked (some asked to support BFKS events, etc...)
- discussed the fact that board members should act as ambassadors for your organization
- some agencies want help from national with major gift campaigns
 - maybe hire a fundraising company that can train and support member agencies in securing major gifts (have a workshop at national or regional conventions)
- discussed using BBBS agency website – sounds like agencies would be receptive
 - needs to be bilingual

4. Have you ever asked your “Bigs” to consider supporting you?

- most agencies do not ask Bigs for support – a suggestion to hold a workshop at

- convention on asking Bigs
- Moncton has had some success with Littles raising money
 - discussed profiling successes in agency monthly newsletters to encourage other Bigs and Littles to fundraise
- discussed pros/cons of asking Bigs from support – sensitive issues

5. If you could make one suggestion to national to focus its energies in terms of fundraising, what would that be?

- create a higher public profile – position nationally as “charity of choice” – no national recognition (don’t try to fundraise for the agencies, just increase profile)
- national has done a good job of securing national partnerships, but not all agencies are able to benefit
 - national needs to focus on developing relationships with companies that exist in smaller, rural communities (discussed Shoppers, Sobeys, etc...)
- Atlantic generally very happy to see national’s involvement in BFKS – great potential for event (national needs to make BFKS into Terry Fox Run or CIBC Run for the Cure)
 - CIBC Run for the Cure is an example of a mass marketing campaign – they tell their story effectively
 - many agencies feel incentives are important for BFKS

6. Is there an area of opportunity for you in terms of fundraising that you wish you could pursue? If so, what is it?

- major gifts and planned giving

7. Do you have any advice for me as we move towards building a fundraising vision for National and the agencies?

- most agencies are “special-vented” to death
- if national could raise overall profile of organization, this would greatly benefit the agencies

Regional Phone Conference on Fundraising:

- All agencies appeared supportive of this

B.C. Fundraising Strategic Plan Focus Group

Date: Monday, March 21st 1:00-2:30 E.S.T.

1. In your area / province, what are your greatest achievements in the area of fundraising over the last two years?

- Bowl For Kids Sake has been successful (Debbie, Cranbrook)
- Special events (Gala, Spring Auction, Golf) have been successful (Tammy, Vancouver)
 - have raised more money last year than in previous years
 - increasing the number of sponsors has increased revenue
- - also increasing the amount to participate as a sponsor
- BUT, special events reach a plateau
- BB of Vancouver was recognized for being very good about sharing information.
- Grants have been successful (Barb, Langley) – especially with banks
 - at the local level, grants appear to be very important – Barb applied for 5 local grants and was 100% successful
- Corporate sponsorships have been successful (but generally not large outside of major centers)
- Third-party events have been successful (Maggie, Quesnel) – nominated by local business to be “charity of choice” – little effort and free money!

Recommendations:

- workshops at regional/national conferences on grant writing would be helpful
- templates on websites on running third-party events, etc...
- agencies to share with other agencies in their area what training is available locally
- focus more on individuals in the future
- utilize BBBSC agency website for sharing info and best practices (it would be good to explore in future focus groups whether agencies actually utilize BBBSC agency website)

2. What are your biggest struggles in terms of fundraising?

- the time fundraising takes
- many Executive Directors report spending 50% of their time on fundraising – being more intense at certain times of the year, ie. Bowl For Kids Sake
- many small agencies don't have a fundraising position
- competition with other charities in their communities
- It was mentioned that other charities such as cancer more closely touch more peoples lives
- ongoing nature of fundraising – need sustainable funding (multi-year funding opportunities)
- (Thought from Harry – a limiting factor of Bowl For Kids Sake is that it takes place in bowling alley and this has been an issue in terms of access to bowling lanes and what happens when the local bowling alley closes down – as has happened in some

communities).

3. Have you had success at generating gifts from individuals?

- some agencies concerned that people are less connected with BBBS' cause (compared to cancer, other charities)
- some agencies feel it is difficult to generate gifts from individuals in a small community
- Abbotsford has been successful with *Raising More Money* program – has proven to be a great cultivation strategy (www.raisingmoremoney.com)
- many agencies do not ask their board members for money
- some concern over asking Bigs for money – they already contribute their time and money to activities
- some agencies recognize that individual giving is the only way to grow and sustain

4. Have you ever asked your “Bigs” to consider supporting you?

- not generally done, but agencies have asked them to participate in BFKS
- agencies get some (but little) participation with Bigs through BFKS
- often response is minimal when asking Bigs for a financial contribution
- encourage Bigs to find out whether their companies have matching dollars for fundraising events or volunteer time contributed
- find way to encourage Bigs to designate their United Way gift to BBBS
- plant seeds by featuring in agency newsletter Bigs or Littles who are giving back to the agency by fundraising.

5. If you could make one suggestion to national to focus its energies in terms of fundraising, what would that be?

- sharing best practices – website (BBBSC agency website) and regional conferences (agencies would participate in!)
- branding information was really good (i.e., materials provided for BFKS – posters, brochures, etc)
- national to subsidize agencies trying new programs (i.e., Raising More Money)
- templates – agencies could really benefit
- encouraged to keep stuff simple - Some of the national workshops too sophisticated for member agencies – especially those lacking fundraising staff
- most communities don't have an opportunity to take advantage of national sponsors spinoff
- pleased with AIM Trimark materials through BFKS
- would like to see more national sponsors like AIM Trimark - like organizations like Relay for Life get. (Harry pointed out afterwards this is sometimes more challenging for an organization like BBBS that is based on a franchise model.)

6. Is there an area of opportunity for you in terms of fundraising that you wish you could pursue? If so, what is it?

- one agency felt that national was promoting programs that are too sophisticated (i.e., planned gifting) – templates too difficult for a small agency
- grassroots tools and templates needed
- sharing corporate partnerships with local agencies – very pleased with BFKS support that national offered
- complete presentation package to take to corporations – what goes into it?
- developing annual fundraising plans – sharing between agencies?
- “expert” fundraising support from national – teams
- have been able to piggyback on BB of Vancouver advertising for BFKS
- a national media sponsor would be good

7. Do you have any advice for me as we move towards building a fundraising vision for National and the agencies?

- the biggest issue is sustainability and sustained, multi-year funding (can grow programs if we don't know what kind of funding we have)
- planning issues
- difficulties getting core funding

Regional Phone Conference on Fundraising:

- All agencies appeared supportive of this

Online Survey Data Themes

Summary of Comments

48 Agencies Reported Total Revenue of Under \$150,000

1. **Please explain your reasons to Question 9 (How would you rate the reputation of Big Brothers Big Sisters)?**
 - The agency and the national organization have demonstrated leadership and accountability. We reach out to children in our community and give them positive experiences.
 - Nationally, BBBS is very well respected and has been very effective in promoting the movement/brand through its corporate partners and media advertising. Locally, we are very well supported by the public and businesses, as we have been very active in the community, with fundraising and promotional events.
 - People know about BBBS and speak positively about it. Locally, we have worked hard to be a part of the community.
 - A high number of people are not aware that there is a national level of BBBS.
 - The movement is very highly thought of, even by those who don't really know what we do. This name is recognized and positive assumptions are made about the programs. Locally, we have had many success stories, and being a small town means everyone knows about these.

2. **What do you believe is the primary mission of the Big Brothers Big Sisters movement?**
 - To provide children and youth with a mentor. Someone they can look up to who encourages them to stay in school, develop socially and help them to establish goals and dreams so they can in turn become a caring member of society.
 - Positive role modeling, mentoring by adults for youth friendship, trust, support, interest
 - To provide mentoring services to youth primarily from father-absent homes. The primary mission of the national office is to represent BBBS on a national, regional and local level providing support services. National is responsible for keeping BBBS strategically placed within the mentoring arena globally.

3. **Please note any additional training ideas you may have.**
 - Strategic planning

4. **Please list the staff positions in your agency that dedicate at least part of their time to fundraising and how many hours, on average, they spend per week on fundraising.**
 - Executive Director, 10-15 hours a week

- I'm the only staff and I dedicate a good portion of my time to fundraising at specific times of the year i.e. Bowl for BBBS is in October so August through to October is busy.
- Executive Director, 80% of time, or 28 hours of 35 hour work week
- 5 hours a week
- I have recently assembled a development team of three full-time staff therefore 120 hours per week is dedicated to fundraising, recruitment and publicity.
- Executive Director, 20 hours per week

5. What are the barriers to or challenges in achieving significant revenue growth? Please explain.

- I believe that we need to find a way to better get sustainable funding from government and large corporations if we are to grow and meet the demands by 2013.
- Volunteers... but if we had the money to work without spending so much time on fundraising, we could be working at recruiting more volunteers and putting the programs into place more efficiently.
- Actually, our agency is striving to maintain the current level of fundraising. There is much competition for fundraising dollars in our area and to even double our current fundraising would be a monumental task.
- You would think that children would have universal appeal and it does to some extent however health care issues seem to be the winners these days and it's difficult to compete.
- One barrier is unity in the movement – we all kind of do our own things. Another barrier is project funding from foundations/hrsdc.
- Our fundraising results do not meet our current need. We cannot say we can raise any additional funds.
- Need more staff. More creative ideas of raising funds and better partnerships in the community with businesses, etc. that can assist us with fundraising.

6. What are the barriers or challenges (aside from fundraising) that will affect sustainability in your agency? Please explain.

- I believe that trying to achieve perhaps unrealistic goals would affect the sustainability of our agency.
- Time required by board. Most of the people on our board are involved in several committees in our community.
- Hiring the staff with the proper credentials when you can't pay them what they are worth.
- Staff burnout and turnover. Lack of board interest in fundraising.
- Board commitment to fundraising.
- Recruiting enough volunteers

7. List the types of fundraising that your agency is most comfortable doing.

- Bowl for Kids, Calendar campaign, ham and salad lunches, ball tournaments. The ones we really love are the ones done by someone else and we just have to go to help or be the pretty face receiving the money!

- Tradeshows

8. As you work to increase fundraising revenues in your community, what new methods of fundraising do you think your agency should pursue?

- Planned giving and estate giving
- Online donations
- Corporate sponsorship

9. Please name the donor database your agency uses.

- We don't have a donor database.
- Access
- Excel

10. List the types of fundraising support that you would like National to provide.

- Sharing successful fundraising ideas from other agencies, particularly ideas that have worked well in small communities.
- Isolated communities are left out of the mainstream when it comes to national endeavors.
- Individual agency consultation

11. What recommendations do you have for improving the National Fundraising Policy?

- Not aware of the National Fundraising Policy.
- Fundraising on a national level must also include cash for local agencies for supporting their work and to secure sponsors who are accessible and beneficial to all not a few.
- National needs to communicate with agencies to identify need.
- National's fundraising has been all about their survival and not the charter agencies.
- Keep member agencies informed and involved.

12. What would be implications be with your local United Way if your agency greatly increased the amount of money it raises?

- It's a minimal amount and its core funding, which growth would justify.
- This would create problems. Our United Way is really starting to assert its authority and has quite underhandedly taken one fundraiser away from the Boys and Girls Club.

Summary of Comments
From 41 Agencies with Total Revenue of Over \$150,000

1. Please explain your reasons to Question 9 (How would you rate the reputation of Big Brothers Big Sisters)?

- We have a great brand and are well recognized.
- I believe that BBBS has a great reputation. It is evident by the comments that I hear around town and the level of support we continue to receive from our community.
- Locally the agency is high profile, highly respected, recognized in business and non profit sector as contributory and participatory. Respected for programs, response to children's needs, proactive and very active fundraisers.
- The name is well recognized but the nature of the services provided is less clear.
- Brand awareness is high. Some have no idea what a national office does but it is understood what a local agency does for and with kids.

2. What do you believe is the primary mission of the Big Brothers Big Sisters movement?

- Help build healthy children and therefore healthy communities.
- To provide mentoring programs and advocacy for youth through positive friendships in a safe environment.
- To aid in the healthy development of children.
- To facilitate the personal growth of children by providing a relationship of support and friendship with caring, screened community volunteers. Our hope is that this will assist them in developing positive attitudes, self-esteem and the confidence to meet the challenges of life.

3. Please note any additional training ideas you may have.

- How to launch a capital campaign.
- Planned giving workshops
- Proposal writing
- Special event management

4. Please list the staff positions in your agency that dedicate at least part of their time to fundraising and how many hours, on average, they spend per week on fundraising.

- Administrative assistant – during the BFKS campaign this person would spend most of her 37.5 hours per week on fundraising. Executive director –over half of this person's time is spent on fundraising.
- Executive director – 25 hours/week
- Executive director – 75% of her time

5. **What are the barriers to or challenges in achieving significant revenue growth?**
Please explain.

- Lack of human resources that can be dedicated to strictly fund development.
- We already fundraise 85% of our operating budget. Our staff and our volunteers quake at the thought of having to raise more.
- Our challenge will be to develop a fundraising campaign to increase our individual donors and major individual gifts.
- Extreme competition from other charitable organizations.
- Lack of new fundraising ideas.
- A wonderful goal but I suspect it to be unrealistic. We do not have a significant degree of industrial growth or areas. We do not have the staffing support to raise these kinds of dollars. If our staff have to do any more fundraising than they do, our programs and services will suffer so the long term goal becomes diluted. We have depleted every possible grant that is available to us. We strive to develop corporate partnerships with the limited companies and businesses we have.
- Competition for charity dollars. No core funding.
- Perception in the community that we are a government or United Way agency
- We currently raise 60% of our total operating budget, which is an enormous task. Critical time is always devoted to finding available dollars.
- Need more staff to fundraise and more financial resources to pay for additional staff.
- Difficult to find volunteers in a position to make a medium to long term commitment to agency.

6. **What are the barriers or challenges (aside from fundraising) that will affect sustainability in your agency? Please explain.**

- Staff turnover. We need to stabilize the staffing support to see program and revenue growth. Lack of strength in our volunteer committees and board members. Most board members have not been recruited with fundraising as an expectation. Leadership changeover has had and could have an impact.
- Need for services are increasing. We have a large waiting list.
- Volunteer time: difficult to find volunteers in a position to make a medium to long term commitment to agency.
- Ability to attract and retain good dedicated volunteers and staff.
- Human resources
- Competition in the marketplace.

7. **List the types of fundraising that your agency is most comfortable doing.**

- Third party – those that are less time intensive as it pulls on the internal resources of the organization.
- Event fundraising – BFKS, golf tournament, gala. Grant applications for special programs. Raffles. Partnerships with other agencies.

8. As you work to increase fundraising revenues in your community, what new methods of fundraising do you think your agency should pursue?

- Running a business that will generate revenue and sustain our programs and provide for opportunities to grow our mentoring business.
- Planned giving program
- Grant writing to foundations and corporations.
- New special events
- Increase annual campaign
- Major gift giving

9. Please name the donor database your agency uses.

- Raiser's Edge
- Income Manager
- Access
- Goldmine

10. List the types of fundraising support that you would like National to provide.

- We need some direction from national in terms of “what the trends are”, assisting agencies in acquiring knowledge from experts etc. Innovative and new ideas.
- Core funding – we should be provided with a modest sum for core funding to alleviate the stress of having to justify our current programs and develop new initiatives which appeal to funder's need to support new programs.
- Get the agencies approved as social services agencies so we could apply for provincial government funding.

11. What recommendations do you have for improving the National Fundraising Policy?

- I'm not fully aware of the national policy so I cannot comment of improvements. There should be more regular dialogue with the agencies about this issue.
- Communicate more with the agencies. We need to know who you are approaching and for what, before you do it. You need to know who our supporters are and what they are doing for us. If National's approach to a funder results in an agency losing relied-on support from that funder, the results could seriously affect the sustainability of that agency.
- National has never adequately addressed the fundraising needs of the local agency. They have had to concentrate on staying afloat themselves.
- The policy should include such things as privacy of donors, selling donor lists, etc. Privacy issues.

12. What would be the implications be with your local United Way if your agency greatly increased the amount of money it raises?

- We are being cut back now, so may further reduce funding. Difficult to increase funding with the three month black out period and the restrictions on contacting corporations that support United Way.
- We would lose support.
- Probably not that much. Right now we are restricted from doing any fundraising during the month of October for a maximum of \$10,000 to date. It would be good not to be dependent on United Way.
- There is little doubt in my mind that allocations from the United Way would continue to decrease, perhaps to the point of being eliminated if our agency is able to substantially increase its own fundraising.
- We are limited in the grants that are available to us because we are United Way members. In order to raise more grant money, we may need to look at stepping aside from the United Way.
- We are not a United Way agency.