

FUNDRAISING REPORT - SUMMARY

May 2013 Board Meeting

As the third quarter for fiscal year 2012/13 approaches, we are able to report a continued increase in most revenue streams where fundraising activities are required. Overall, we have received \$4.89M or 47% of our revenue to be fundraised goal of \$10.3M - this is up from 30% in February's report. An additional \$3.2M is anticipated from confirmed annual and endowment pledges, bringing us to \$8.1M or 79% of our target.

| Revenue Stream | 2011/12 Final Results | 2012/13 Goal | 2012/13 Goal as % over 2011/12 Final Results | 2012/13 Received to date | % of Goal Received to date | 2012/13 Confirmed to date | 2012/13 Received & Confirmed Total | % of Goal Received & Confirmed |
|---|--------------------------|---------------------|--|--------------------------|----------------------------|---------------------------|------------------------------------|--------------------------------|
| Corporations/Corp. Foundations | \$2,400,056 | \$3,137,270 | 31% | \$1,641,730 | 52% | \$948,997 | \$2,590,727 | 83% |
| Corporate Campaigns | \$2,056,352 | \$2,400,000 | 17% | \$207,540 | 9% | \$1,191,843 | \$1,399,383 | 58% |
| Individual Giving | \$2,174,383 | \$2,532,500 | 16% | \$1,165,721 | 46% | \$561,872 | \$1,727,593 | 68% |
| Foundations | \$915,028 | \$992,170 | 8% | \$803,987 | 81% | \$276,000 | \$1,079,987 | 109% |
| Special Events | \$501,940 | \$480,000 | -4% | \$146,811 | 31% | \$49,650 | \$196,461 | 41% |
| Clubs, Unions & Assoc | \$16,256 | \$12,500 | -23% | \$27,500 | 220% | \$0 | \$27,500 | 220% |
| Memorial Funds | \$8,298 | \$8,500 | 2% | \$225 | 3% | \$0 | \$225 | 3% |
| Institute Fees | \$4,900 | \$4,000 | -18% | \$4,900 | 123% | \$0 | \$4,900 | 123% |
| Sub Total Revenue to be Fundraised | \$8,077,213 | \$9,566,940 | 18% | \$3,998,414 | 42% | \$3,028,362 | \$7,026,776 | 73% |
| *Endowment Contributions (existing and new pledges) | \$2,400,545 | \$700,000 | -71% | \$844,776* | 121% | \$150,000 | \$994,776 | 142% |
| Government | \$328,673 | \$34,000 | -90% | \$48,127 | 142% | \$34,000 | \$82,127 | 242% |
| Total Revenue to be Fundraised | \$10,806,431 | \$10,300,940 | -5% | \$4,891,317 | 47% | \$3,212,362 | \$8,103,679 | 79% |
| Investment Earnings* | \$389,829 | \$468,000 | 20% | \$378,261 | 81% | \$330,750 | \$709,011 | 151% |
| Transfer from Deferred Revenue | \$848,700 | \$494,000 | -42% | \$619,350 | 125% | \$0 | \$619,350 | 125% |
| Ann Southam Bequest Transfer from Reserves | \$698,100 | \$1,544,993 | 121% | \$0 | 0% | \$1,030,493 | \$1,030,493 | 67% |
| Total Non-Fundraised Revenue | \$1,936,629 | \$2,506,993 | 29% | \$997,611 | 40% | \$1,361,243 | \$2,358,854 | 94% |
| GRAND TOTAL ALL REVENUE | \$12,743,060 | \$12,807,933 | | \$5,888,928 | 46% | \$4,573,605 | \$10,462,533 | 82% |

*Includes \$500K recent additional instalment from Estate of Ann Southam

Our non-fundraised revenue goal of \$2.5M (investment earnings, transfers from deferred revenue and from reserves) brings the bottom line goal to \$12.808M. We are at **\$10.46M or 82% received or confirmed to date against our overall goal.**

Growth in the area of our Corporate Campaign is directly linked to our recent Move for Hope event (details highlighted later in this report). Individual Giving and Foundations contributions continue to be received, however some challenges are being experienced in renewing support of previous Women Moving Women donors who have completed their pledge commitments, or who made one time gifts in previous years.

CORPORATE

We are on track to achieve \$517,000 more in corporate revenue over 2012 actual results (a 22% increase). However, we are projecting a shortfall of \$251,000 overall against our initial goal which was set with an ambitious 31% increase. This shortfall is due in part to: a) The unanticipated inability to pitch the Coady Leadership Institute to corporate prospects because of internal review b) a key staff person was no longer able to work in a fundraising capacity because of illness c) the deferral of decisions for a key prospect d) the unexpected decline of two key prospects (J+J and ATB Financial).

84% of revenue has been received or confirmed (\$2.59M). There is potential for an additional \$290K with activities currently in progress to enable these contributions to be secured.

The new Corporate Advisory Cabinet which met for the first time in April is committed to making 25 new corporate introductions which will be the main driver for increased corporate revenue for 2013-2014.

CORPORATE CAMPAIGNS

The Campaign to Raise Hope (formerly Shelter from the Storm) is on track to be \$324,589 or 15% over 2012 actuals and \$105,000 or 4.5% over the 2013-2014 goal of \$2,400,000.

- **Move for Hope** is projected to come in 7% over the 2013-2014 goal of \$364K - instead of hiring a company to support events in 7 markets we took the position in-house and had staff on the ground in each market. This model worked really well.
- **Shop for Hope** is off to a fantastic start with first week of decal sales a bit higher than this time last year (particularly significant given there was a downturn in traffic at Winners HomeSense stores due to poor weather across the country)
- **Morning for Hope** - the excitement for May 8th is building - every hour of the telethon in 7 markets has a corporate donor to help drive donations (ie. if we get 50 calls this hour Royal LePage will donate \$5,000!). New revenue drivers this year include: local phones in each market (as opposed to all the calls coming to Toronto) and local celebrity engagement in each market.

INDIVIDUAL GIVING / FOUNDATIONS

We are reminded to consider results in these two revenue streams in combination. Many individual donors (Leadership in particular) are giving through private foundations as opposed to making direct personal contributions. Therefore, our trend continues with an increase in giving through Foundations.

Currently we have received \$804K or 81% of our Foundations goal and have confirmed pledges for an additional \$276,000. This will bring us over goal by \$87,000.

Individual gifts are tracking at \$1,165M or 46% of goal received to date. An additional \$561K is confirmed through existing pledges, including Women Moving Women pledges of \$185K, to bring us to 68% of our \$2.5M goal.

We anticipate that we will not realize the full commitment against Women Moving Women pledges though we are currently pursuing all pledges. In conjunction with our WMW campaign, goals were set to renew one-time supporters of WMW (original gifts of \$2,500) at a minimum of \$1,000 or more. Though response has been positive with many supporters, others are choosing to renew at significantly lower levels, or have not yet renewed. Follow up through one on one calls and correspondence continues to ensure all opportunities are pursued fully.

Current achievement shows that we are at 57% of our \$1,000+ goal of \$1.8M goal (including Alberta) with just over \$1M in received and confirmed pledges. However, with a number of active prospects, and other outstanding gifts anticipated to come in slightly ahead of goal, we are cautiously optimistic that we may still make our target.

Breakdown of Individual Giving Results

| Revenue Stream | 2011/12 Actual Final Results | 2012/13 Goal | 2012/13 goal as % over 2011/12 final results | 2012/13 Received to date | % of Goal Received | 2012/13 Confirmed to date | 2012/13 Received & Confirmed to date | % of goal Received and Confirmed |
|--|------------------------------|--------------------|--|--------------------------|--------------------|---------------------------|--------------------------------------|----------------------------------|
| Leadership (\$10,000+) | \$901,234 | \$1,300,000 | 44% | \$353,397 | 27% | \$280,423 | \$633,820 | 49% |
| Major/Medium (\$1,000 to \$9,999) | \$230,267 | \$500,000 | 117% | \$300,431 | 60% | \$96,449 | \$396,880 | 79% |
| Total Major/Leadership | \$1,131,501 | \$1,800,000 | 59% | \$653,828 | 36% | \$376,872 | \$1,030,700 | 57% |
| Other Gifts (\$999 and under/incl. WMW \$500 pledges) | \$1,042,882 | \$732,000 | -30% | \$511,893 | 70% | \$185,000 | \$696,893 | 95% |
| Grand Total Individual Giving | \$2,174,383 | \$2,532,000 | 16% | \$1,165,721 | 46% | \$561,872 | \$1,727,593 | 68% |

ALBERTA (all results are also reflected within overall charts above)

Individual Giving

Alberta individual giving continues at a strong pace toward goal. With recent staff transition there has been an intentional focus on one to one stewardship for many of our donors. Comprehensive solicitation plans are currently being actioned for all of our major and medium donors and we anticipate a busy spring here in Alberta!

The Alberta fundraising goal for individual donors over \$1000 for this fiscal year is \$475,750. To date Alberta has received and confirmed gifts and pledges totaling \$435,045, which is 91% of goal. It should

be noted that there is \$127,500 in likely money that we hope to receive in the coming months, which will position Alberta at 118% of the 2013-14 fundraising goal.

Corporate Giving

Over the past few months corporate fundraising activities in Calgary have been focused on obtaining successful sponsorship for both our May Perfect Pairings event and our October breakfast. Desjardins Financial is our confirmed \$5,000 corporate sponsor for our Perfect Pairings event on May 30th, and we have wine and cheese representatives providing their services and products *pro bono* that evening. To date we have already obtained \$50,000 in confirmed corporate sponsorship for the 2013 Calgary Breakfast, with \$27,500 pending. A new corporate breakfast sponsorship package was developed and launched this year in the Calgary market and positive feedback has been received from many in Calgary's corporate sector, who appreciate its professional and focused approach.

The launch of the new National Corporate Advisory Cabinet will no doubt strengthen and build on our work in the corporate area in western Canada. There are four senior level executives from Calgary on the national cabinet who will not only facilitate introductions, but will also provide invaluable insider knowledge to our corporate fundraising work in Western Canada.

Edmonton

Discussions are continuing with an interested group in Edmonton who are in the early stages of forming a committee. The committee has expressed an interest in moving forward with a Perfect Pairings event in early 2014 followed by an Edmonton Breakfast later that year.

OUTREACH/NEW MARKETS

We continue to work closely with volunteers in Vancouver towards growing awareness and support in this market. It has been determined that we will not pursue a Breakfast event in Vancouver for Fall 2013 but rather plan for this to happen instead in the early part of 2014. However, we will have an event in the Fall of 2013 to ensure continued awareness of the Foundation in Vancouver.

The Vancouver Committee was recently introduced to both Heather Morley and Jessica Houssian to bolster their enthusiasm as we grow support with their help.

DIRECT MAIL

With the assistance of a Direct Mail specialist (hired for this purpose), our Direct Mail campaign is now set to launch at end of May with a mailing to over 10,000 individuals in our database. This includes lapsed donors and current donors who have not yet renewed for this fiscal year and many others who have been receiving our e-newsletter or other correspondence but have never before been directly solicited for a gift. Many are donors who have made gifts of less than \$200 through various pledge-based events in years past. This first attempt to reach out to past supporters in this way will enable us to determine the value of developing a comprehensive Direct Mail strategy moving forward.

Details of all activities in support of the above results are attached in the Fundraising Appendix.