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2016

Fundraising Strategies





Annual Giving



Online Trends



Efficient Events



Relationships Vs. Self-Serve



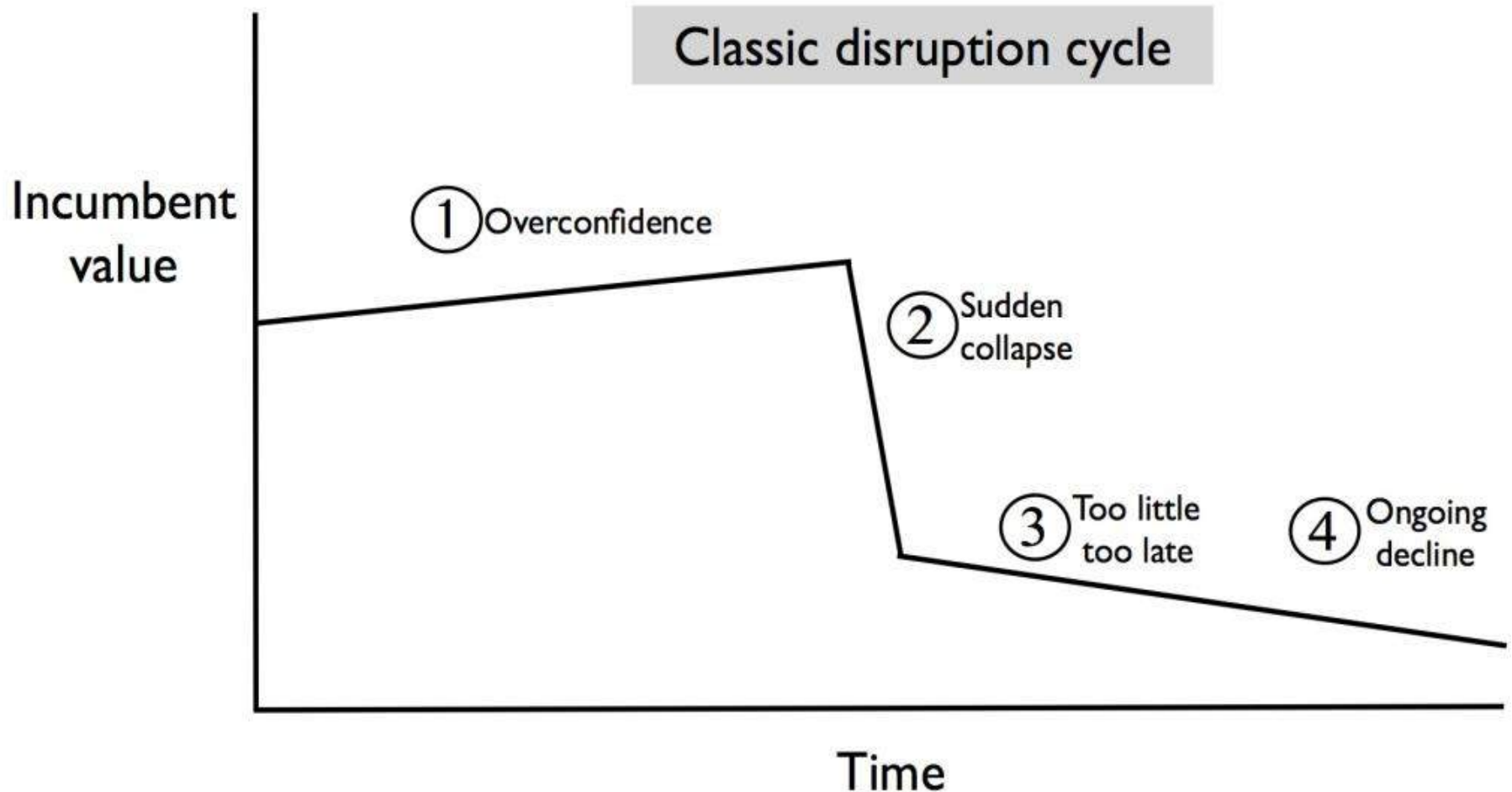
Planned Giving

Disruption: The new norm

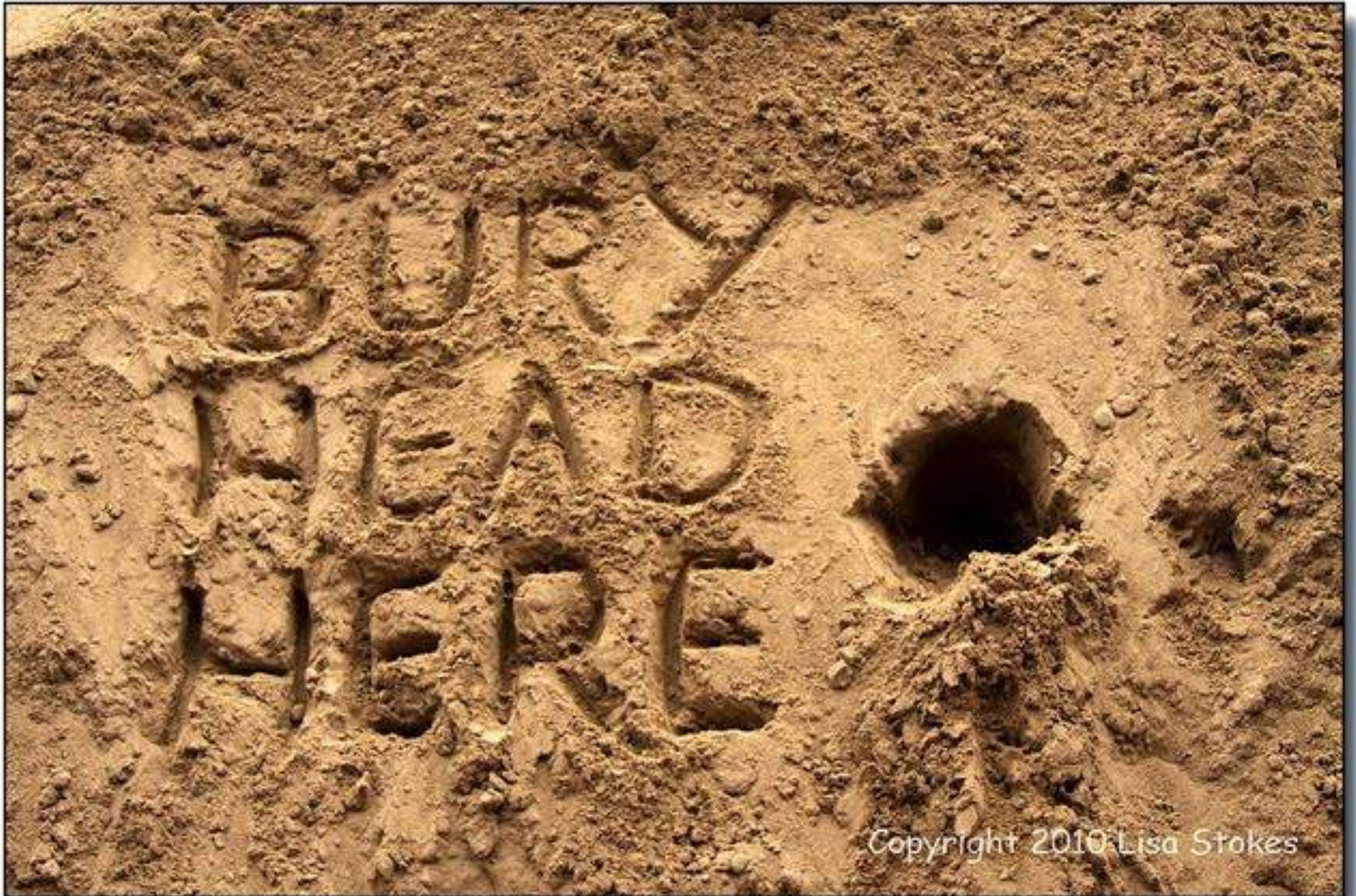


- Disruption is systematic and comes from outside: Music, travel, taxi industry
- Charities are exposed to innovation in technology and to shifting demographics – rapid adaptation is a must
- **But - social innovation is a complex. Experimenting, failing and learning is key.**

From Over Confidence to Too Little, Too Late



The Choice is Clear?



Copyright 2010 Lisa Stokes



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Planned Giving

Dramatic demographic shifts affecting giving.

	GEN Y (18-32)	Gen X (33-48)	Boomers (49-67)	Civics (68 & over)
Size of Segment	3.4M	4.8M	5M	2.4M
% That Give	62%	79%	78%	87%
Amount Give	\$639 (15%)	\$831 (27%)	\$942 (32%)	\$1,507 (25%)
# of Charities	4.0	4.5	4.9	7.0
Want to see impact	55%	44%	28%	34%
Fundraise for charity	51%	49%	36%	25%
Would give w/ mobile	57%	38%	16%	12%
Like/Follow charities	58%	38%	16%	8%
Share about charities	52%	30%	11%	8%

Source: 2013 Canadian Charitable Giving Report, BlackBaud.

Annual = One-time? Think Monthly Giving

- Affordable fundraising
- Administrative advantage
- Financial stability
- Monthly is the gateway...



- Affordable donations
- Greater impact
- Convenience method
- Control timing





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Online is unstoppable

7-10% of overall fundraising revenues are now raised online.

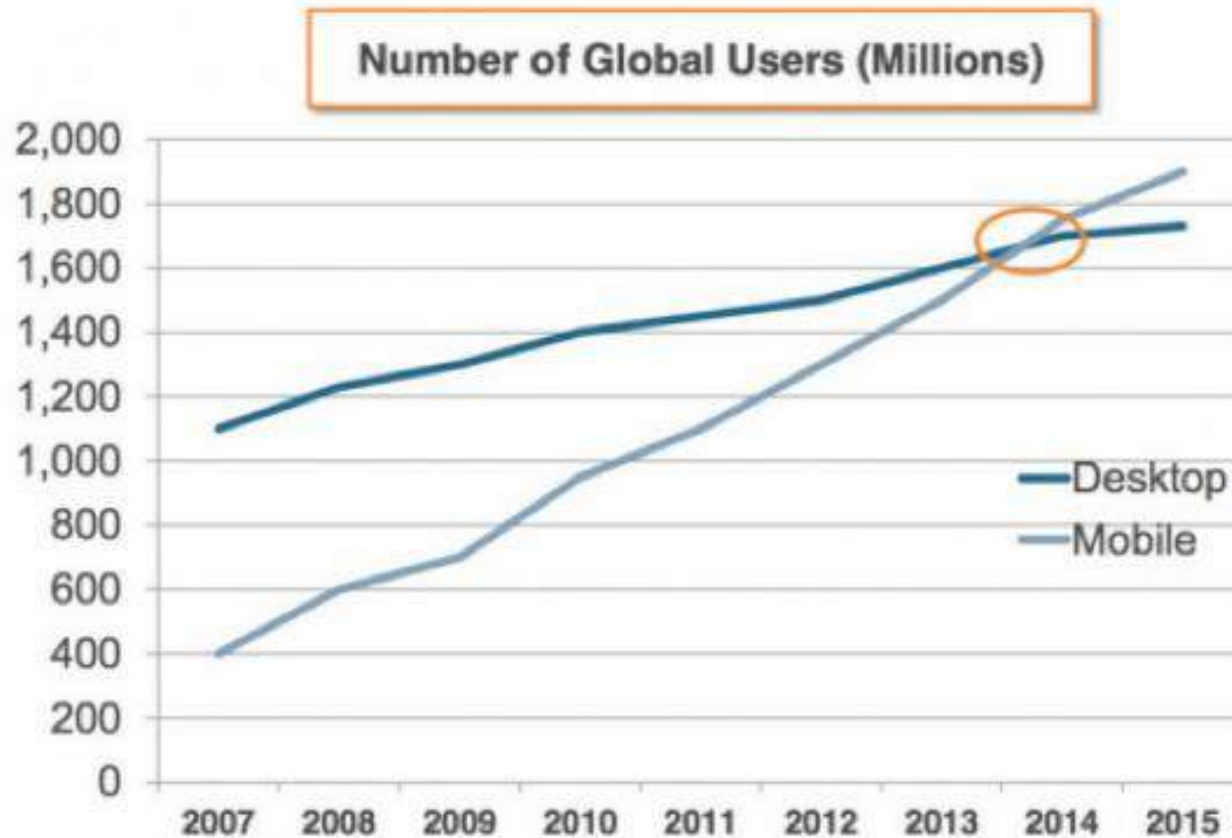
Online giving growing faster than overall giving (9.2% vs. +1.6%).

Small charities growing online donations faster (+18.4%).

Canadians are connected 4 hours, 53 minutes each day.



Mobile: Past the Tipping Point



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Source: Morgan Stanley Research

Source: 2016 Global NGO Online Technology Report.

Paul Nazareth, VP Community Engagement, CanadaHelps



Mobile: A New Desktop

79% of Canadians have a mobile phone.

68% of Canadians have a smartphone.



YOY growth in CanadaHelps visits:
17% on desktop
60% on tablet
90% on smartphone

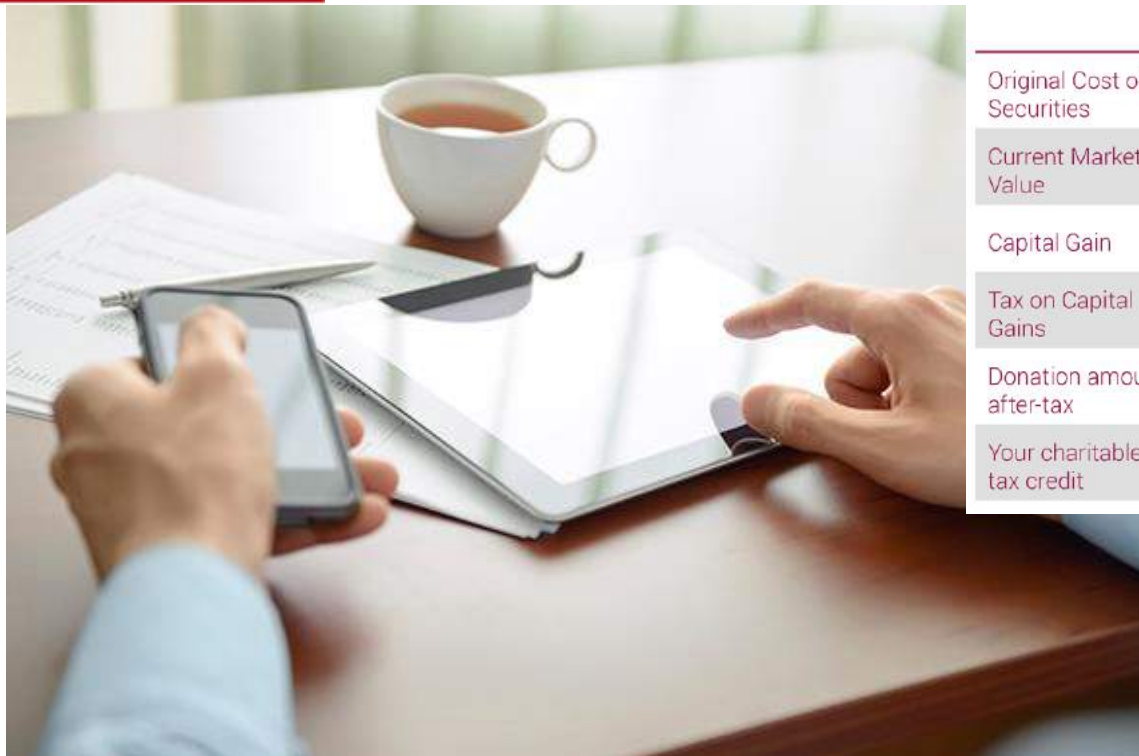
22% of donations through CanadaHelps are via a mobile device.

Only 26% of charities have a mobile-optimized website

OPTIMIZE MAJOR GIFTS

Canada's largest online mutual fund & securities donation platform.

**DONATE
SECURITIES**



	Sell securities and donate the after-tax proceeds	Donate securities through CanadaHelps
Original Cost of Securities	\$1,000.00	\$1,000.00
Current Market Value	\$5,000.00	\$5,000.00
Capital Gain	\$4,000.00	\$4,000.00
Tax on Capital Gains	\$920.00 ¹	\$0.00
Donation amount after-tax	\$4,080.00 ^{2,3}	\$5,000.00 ³
Your charitable tax credit	\$1,876.80 ¹	\$2,300.00 ¹

 **Canada
Helps.org**
giving made simple

P2P: Influence the new currency.

70% personal
30% charity

\$1.35B P2P for charity
market in Canada.

Total US 2013 P2P
market \$9.46B.

Represents 18% of
funds raised in US.

375 P2P platforms in
NA, 1250 globally.



The average charity
grows donations by 15%
when they launch P2P.

Typical fee is 5% of plus
credit card fees.

Friend-driven gifts,
influence is the new
currency – the
implications are still
unfolding.

ONLINE EDUCATION

A comprehensive course developed by for-profit digital marketing experts, offering basic to intermediate skills in:

- Communications
- Fundraising
- Analytics
- Social Media





Grant Thornton

An instinct for growth™



Growing communities

How charity leaders govern social media globally to thrive online

#NIPSocialMedia



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Planned Giving



- **Events = Experience**
- **Memorable + Mission**
- **Sweat the strategy (\$)**
- **It's 2016, get digital:
Tickets, auctions,
donations, social,
engagement, follow up**



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Planned Giving

Combination of idealism and social media fluency makes them passionate active supporters.



Charities to Causes

Source: Canadian Millennials Winning, The Atlantic, Jan 11, 2016. The Next Generation of Philanthropy, Imagine Canada, January 2015 3 Defining the Canadian Millennial, Retail Insider
Paul Nazareth, VP Community Engagement, CanadaHelps



Revenue



- Received donations \$956,504 (79%)
- Non-receipted donations \$102,897 (8%)
- Gifts from other charities (0%)
- Government funding \$2,881 (0%)
- All other revenue \$149,296 (12%)

Total revenue: \$1,211,578

Expenses



- Charitable program \$675,867 (75%)
- Management and administration \$227,330 (25%)
- Fundraising (0%)
- Political activities (0%)
- Gifts to other registered charities and qualified donees (0%)
- Other \$0 (0%)

Total expenses: \$903,197

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Charity Google + Impact Narrative

The screenshot displays the website for Delisle Youth Services. At the top, the logo features a green tree and the text 'DYS DELISLE YOUTH SERVICES'. The header includes the organization's name, registered name, and business number, along with a 'Donate Now' button and social media icons. A navigation menu contains 'About', 'Current Campaigns', and 'Our Impact'. Below this, a blue bar lists 'Overview', 'Our Results', 'Our Financials', 'Testimonials', and 'Our Programs'. The main content area is titled 'What we're working to address' and contains three columns: 'Our Strategies', 'Creating Change', and 'Longterm Desired Outcome'. Each column has a brief description and a 'Read More' button. Below this is a 'Our Results' section with three large data points: '\$10,562', '376', and '58%', each accompanied by a small image and a 'Read More' button. The bottom of the page features a final image and a 'Read More' button.

A person with long hair, wearing a vibrant, multi-colored patterned outfit, stands against a background of horizontal stripes in red, yellow, and purple. The person is positioned on the left side of the frame. The overall scene is displayed on a tablet screen held by two hands.

Human Contact

No info@email
No front desk #
Not just titles



Have you dissected your donor's journey?

Tracking email, mail, phone, online?

Customize by appeal and channel?

From gift, to visit to donation?

- Automate requests
- Get material to staff
- Teach board/volunteers
- Humanize response





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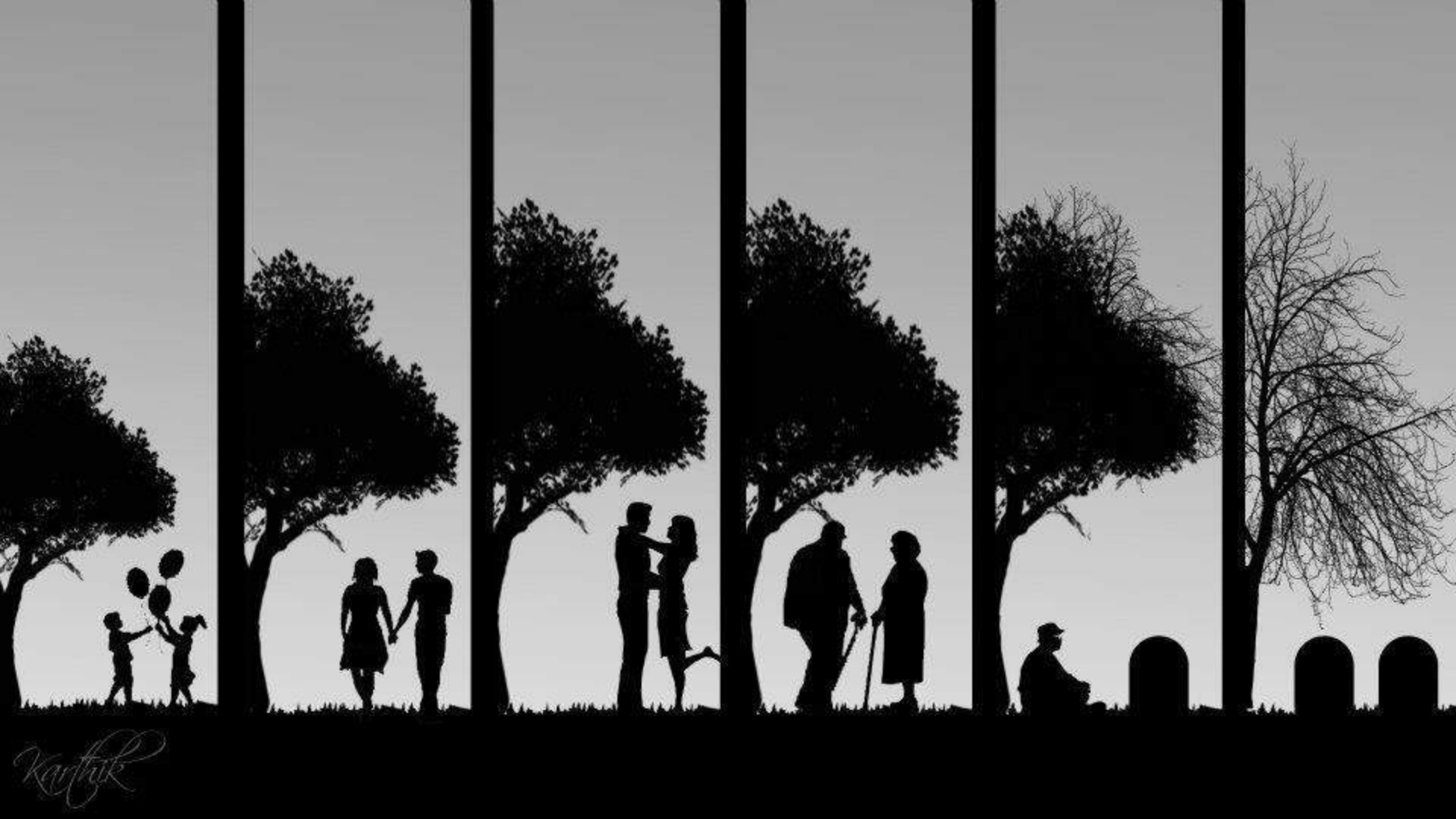
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WHERE DO YOU FIT IN THE ST



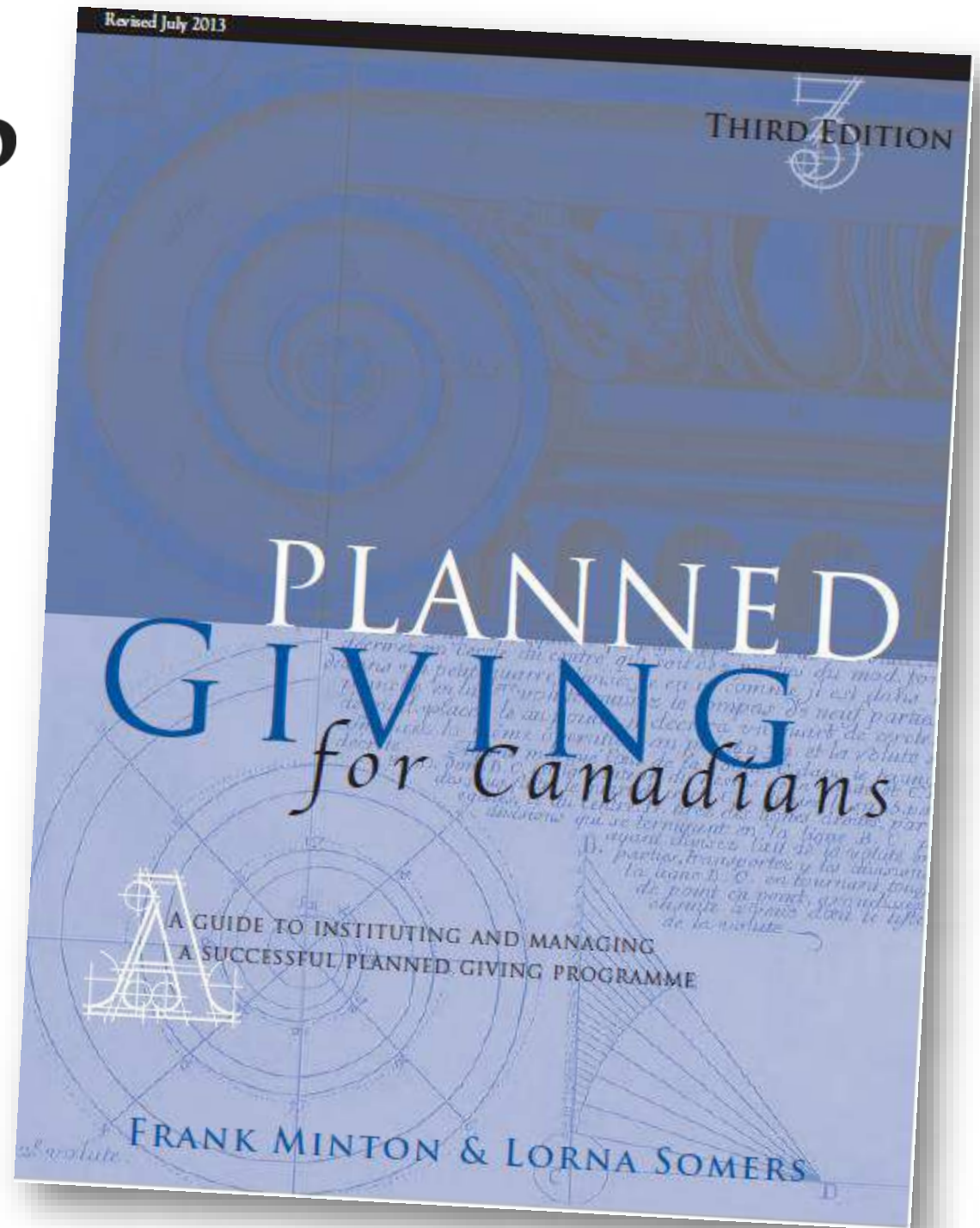
WHY --- INCOME

HOW --- ASSETS





CAGP



HEART AND STROKE FOUNDATION

Official bequest language to give to your lawyer/estate planner.

Legal Name: Heart and Stroke Foundation of Canada
Charitable Registration #: 10684 6942 RR0001

Residual Bequest

"I direct my Trustees to pay or transfer ____ (number) of such equal shares of the residue of my estate to the Heart and Stroke Foundation of Canada (the "Foundation") to be used for the Foundation's general purposes [or, to be applied by the Foundation as its directors see fit]."

General Legacy

"I direct my Trustees to pay or transfer the sum of \$ _____ to the Heart and Stroke Foundation of Canada (the "Foundation") to be used for the Foundation's general purposes [or, to be applied by the Foundation as its directors see fit]."

Discretion to Transfer Shares

"In making any payment to a charitable institution pursuant to the provisions of this Will, my Trustees may transfer any shares held by my estate in any publicly traded company or corporation in lieu of cash, provided that the shares transferred shall have a fair market value on the effective date of the transfer equal to the amount payable to the charitable institution. In exercising their discretion, my Trustees shall take into consideration the tax benefits, if any, which may be enjoyed by my estate by transferring such shares in specie."

Specific Legacy

"I direct my Trustees to pay or transfer the sum of \$ _____ of my estate to the Heart and Stroke Foundation of Canada (the "Foundation") and I direct the Foundation to apply such sum towards research. In the event that circumstances make the specific use of this gift no longer practical or desirable, the directors of the Heart and Stroke Foundation are hereby authorized to make changes in its use which remain in agreement with the spirit and general intent of the gift."

Thank you for considering how you can leave a legacy through the Heart and Stroke Foundation.


For more information please call the National Gift Planning Office: 1-800-205-4438 Ext. 2 or contact your provincial **Heart and Stroke Foundation office**.

Note: Bequest administration is managed by the province where the donor resides.

This material provides general information and is not intended to constitute or replace specific professional advice. Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a strategy that achieves their objectives.

heartandstroke.ca





A Guide for Professional Financial Advisors



The Philanthropic Conversation



Philanthropic
Foundations
Canada

Annual gifts are volume. Build systems.

Digital is not optional. Invest NOW.

Events are about strategy. Tweak tradition.

Relationships are good. Reap what was sown.

Planned giving is critical. Demographics don't lie.

Start small, be realistic.

WHAT ARE YOU GOING TO DO?

Black Friday... Cyber Monday..

Get
Involved

GIVINGTUESDAY

CHANGE THE WORLD



WITH A GIVING HEART

National Philanthropy Day[®]



*Make a
Difference
in the Lives
that Follow*



THE PHILANTHROPIC MIND

SURPRISING DISCOVERIES FROM
CANADA'S TOP PHILANTHROPISTS

CHUCK ENGLISH & MO LIDSKY

Lawrence Bloomberg
Tony Comper
Leslie Dan
James Fleck
Richard Ivey
Hal Jackman
Donald Johnson
Eric Lindros
Joe Lebovic
Philip Reichmann
Larry Rosen
Gerry Schwartz
Isadore Sharp
Seymour Schulich
Gary Slaight
Eric Sprott
Larry Tanenbaum
and many more....



Executive Director's
FORUM
of South Niagara

Thank you



Paul Nazareth

Vice President, Community Engagement
pauln@canadahelps.org



Web-Links to Resources

FIRST charity course (6 hour online course, 3 months to complete. \$500, subsidized is now only \$45) created by CanadaHelps <http://bit.ly/CanadaHelpsCourse>

Are you ready for Giving Tuesday 2016? November 29 <http://givingtuesday.ca>

Canada Revenue Agency / Statistics Canada : Giving in Canada <http://www.statcan.gc.ca/pub/11-008-x/2012001/article/11637-eng.htm>

Giving & Volunteering in Canada Report <http://www.statcan.gc.ca/pub/89-652-x/89-652-x2015001-eng.pdf>

Blackbaud Charitable Giving Report <https://www.blackbaud.com/nonprofit-resources/charitablegiving>

Canadian state of the charity web nation report <http://www.goodworksco.ca/2014-canadian-web-benchmark-report/> 2015 to come shortly.

Muttart Foundation & Imagine Canada public opinion report on charities
http://bit.ly/PublicOpinion_Charities

Vital guide to share with advisors in law, tax, insurance, accounting, banking
http://bit.ly/ThePhilanthropicConversation_Advisors from the Canadian Association of Gift Planners

New CanadaHelps ticket sales platform that is a fraction of the cost of for-profit websites
<http://bit.ly/CanadaHelpsTickets> (Events, Galas, Golf!)

2016 NGO online technology <http://www.techreport.ngo>

Imagine Canada new Chief Economist. Here is his first report <http://bit.ly/CharityChiefEconomist>

How to accept donations of securities and mutual funds through CanadaHelps <http://bit.ly/AcceptSecuritiesDonations>

THE single most important book on major & planned giving in Canada <https://www.cagp-acpdp.org/en/civicrm/contribute/transact?reset=1&id=42> which is included in membership to CAGP

Book by businessman Charles Bronfman on “Doing Good” <http://ca.wiley.com/WileyCDA/WileyTitle/productCd-1118264355.html>

Strategy of Giving – CanadaHelps as a charity commissioned experts in the for-profit and charity sector to author the following free white papers:

1. The growth of “person to person” giving (usually around events, this is good for appeals!)
<https://www.canadahelps.org/en/p2p-whitepaper/>
2. Growing monthly donors, more for appeals than offertory <https://www.canadahelps.org/en/free-white-paper-growing-your-monthly-donors/>
3. Want to scale up your Bishop’s dinner? Special events strategy <https://www.canadahelps.org/en/events-whitepaper/>

Brand new movement to explain charity impact <http://bit.ly/CharityImpactMovement>

Grant Thornton LLP – Social Media for Charity Report http://bit.ly/GrantThorntonLLP_CharitySocialMedia

THE book on Planned Giving only \$100 purchase <https://www.cagp-acpdp.org/en/civicrm/contribute/transact?reset=1&id=42>

Here is the “Philanthropic Mind” book I mentioned http://bit.ly/CanadianPhilanthropist_Book

I mentioned the Ontario NonProfit Network several times, this is them <http://theonnc.ca/>
And here is their conference <http://theonnc.ca/events/nonprofit-driven-2016/>

I also mentioned partnering with a national charity who often helps Nonprofits, Tides Canada
<http://tidescanada.org/>

The international online museum of fundraising: SOFII <http://sofii.org/>

The Association of Fundraising Professionals has a lot of resources <http://sofii.org/>

Cheap, fast fundraising education from CharityVillage <https://charityvillage.com/elearning.aspx>

Imagine Canada – What is charity narrative storytelling? Including Toolkit!
<http://www.imaginecanada.ca/resources-and-tools/narrative>

Penelope Burke, of Cygenus Research book on retention of fundraising staff
http://cygresearch.com/dev/?page_id=13899

Upcoming Ontario NonProfit Network Conference <http://theonnc.ca/events/nonprofit-driven-2016/> Oct 2016

Community Foundations of Canada Professional Advisors Resource <http://bit.ly/ProfessionalAdvisorsCFC>

Gift Acceptance Policies

THE primer to read as you form your own policies, published on Imagine Canada website that includes links:
<http://www.imaginecanada.ca/blog/organizations-may-forget-donors-won%E2%80%99t-how-gift-acceptance-policies-protect-your-charity>

Gift Acceptance Policies are contained in “Planned Giving for Canadians” only \$100
<https://www.cagp-acpdp.org/en/civcrm/contribute/transact?reset=1&id=42>

Association of Fundraising Professionals : Gift Acceptance Policy Free Primer
<http://www.afpnet.org/files/contentdocuments/9%20developing%20fundraising%20policies%20and%20procedures.pdf>

Free Template http://www.afpnet.org/files/email/gift_acceptance_policy_sample.pdf

Presentation Notes from Law Firm Carters LLP on developing policies
<http://www.carters.ca/pub/seminar/charity/2011/kcbh0414.pdf>

Blumbergs LLP free receipting and policy kit
http://www.globalphilanthropy.ca/images/uploads/Blumbergs_Receipting_Kit_by_Mark_Blumberg.pdf