

Success in Fundraising and Cultural Awareness in a Hospital Foundation

Healing Hands for Haiti
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Agenda

- **The Language of Fundraising**
- **Where do Gifts Come From?**
- **How?**
- **Why?**
- **Critical Success Factors**
- **Donor Development Process / Cycle**
- **Volunteers**
- **Information Management**
- **Ethics / Stewardship / Recognition**
- **Our Diversity Journey**

The Language of Fundraising

- Acquisition
- Annual Giving
- Bequest
- Capital Campaign
- Case Statement
- Cultivation
- Direct Mail
- Donor
- Donor Acquisition
- Donor Pyramid
- Donor Retention
- Endowment
- Gift In Kind
- Major Gifts
- Moves Management
- Planned Giving
- Prospect / Qualified Prospect
- Recognition
- Solicitation
- Stewardship
- Volunteer

Where do gifts come from?

- **individuals / families**
- **corporations / businesses**
- **private / family foundations**
- **community groups / organizations**

How?

- **Annual Giving**
 - Special Events
 - Third Party Events
 - Direct Response
 - Tribute Giving
- **Major Gifts**
- **Planned Giving**



Why do people give?

- to demonstrate power
- tax and financial planning considerations
- gain influence, professional advancement
- peer approval
- ego gratification/self esteem
- recognition from peers
- identify with a worthy cause of goal
- sincere desire to help/care
- belief in the mission
- immortality
- diminish negative feelings, guilt, fear, anger
- express deep emotion - grief (memorial) or joy (commemorative)
- give something back
- for the joy of it

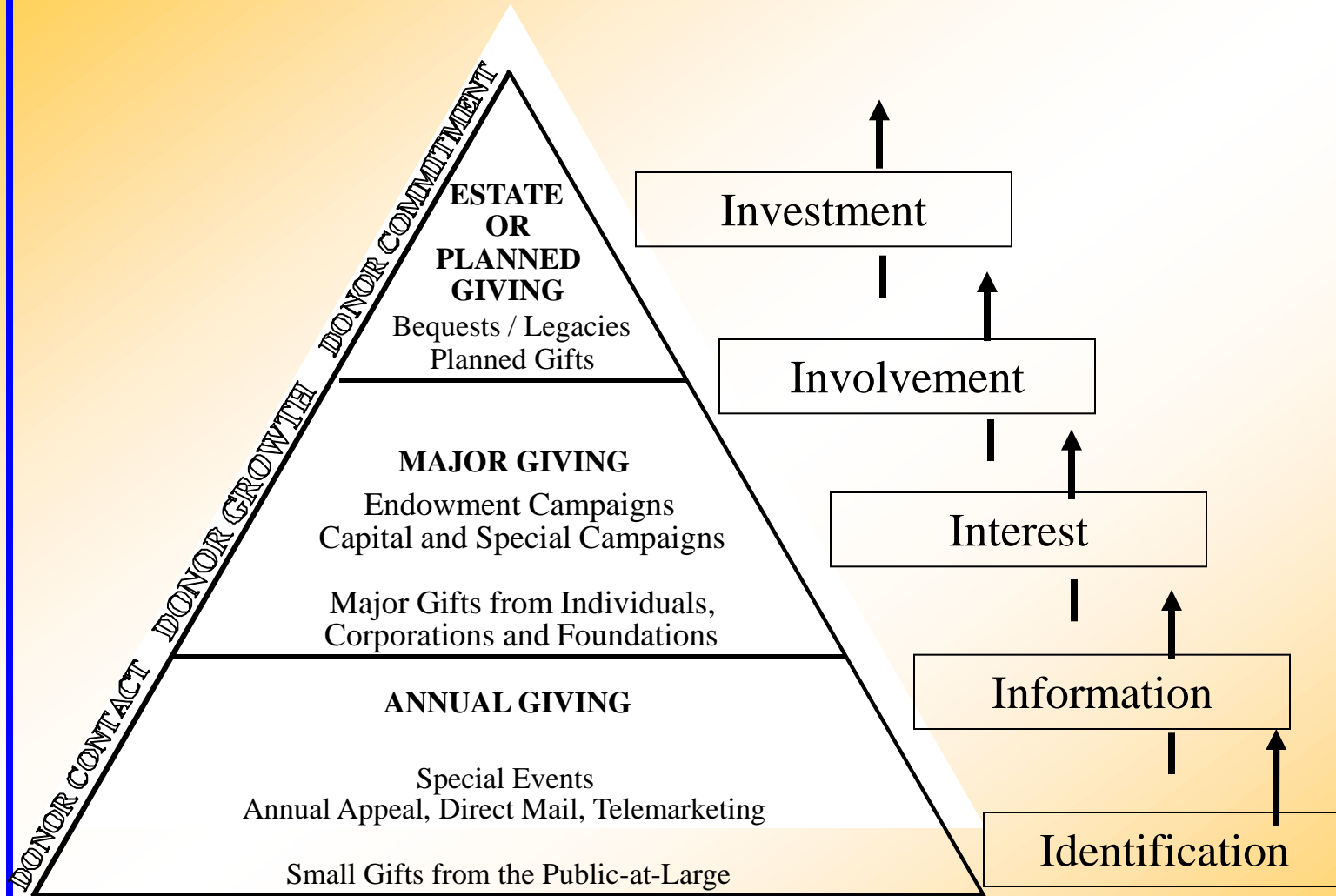
Why do people give?

**BECAUSE
THEY
ARE
ASKED !**

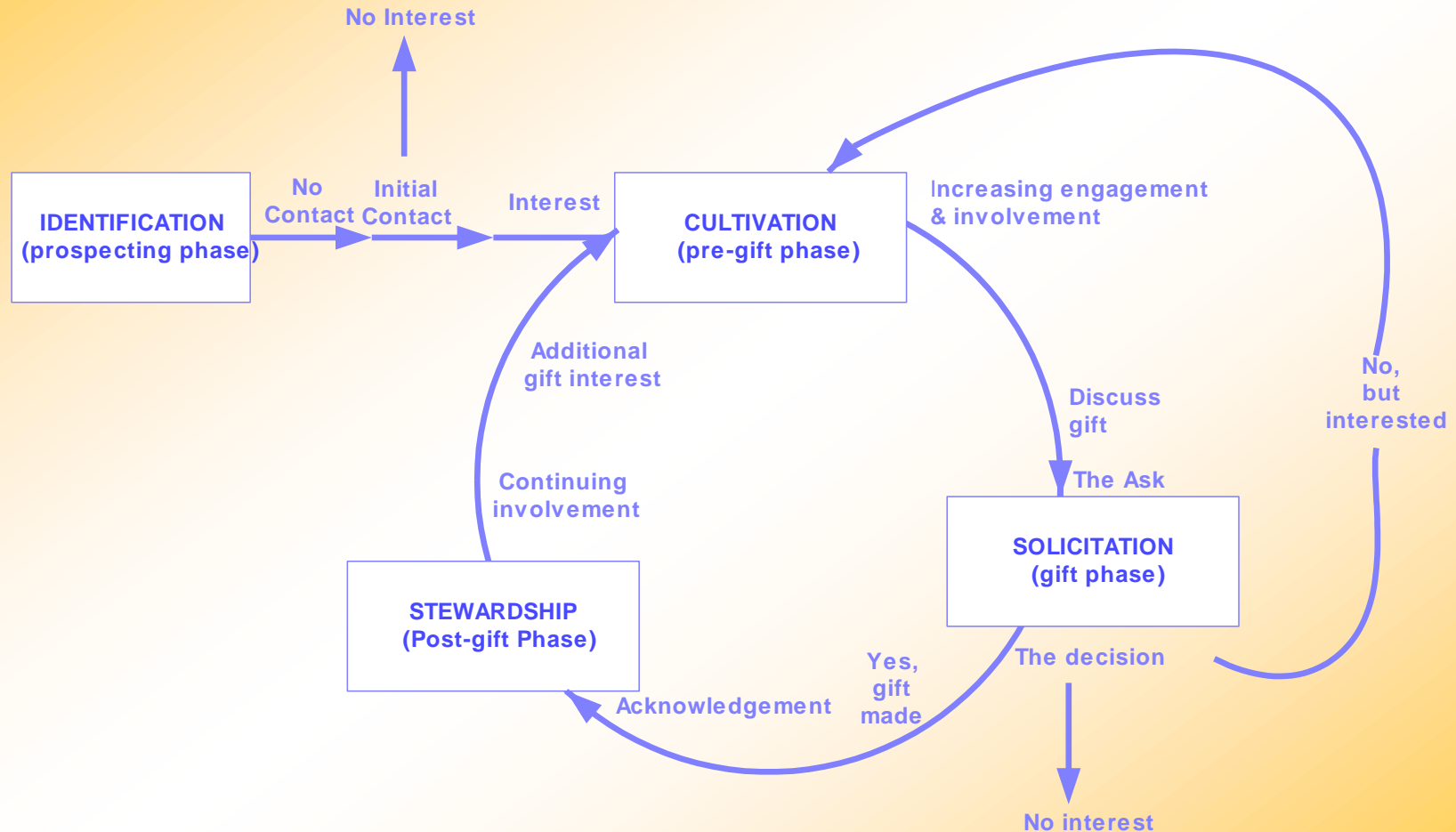
Critical Success Factors

- **Unique and compelling vision**
- **Strong positive image**
- **Urgent and powerful case**
- **Committed influential leaders**
- **Demonstrated interest and support**
- **Sound financial management**

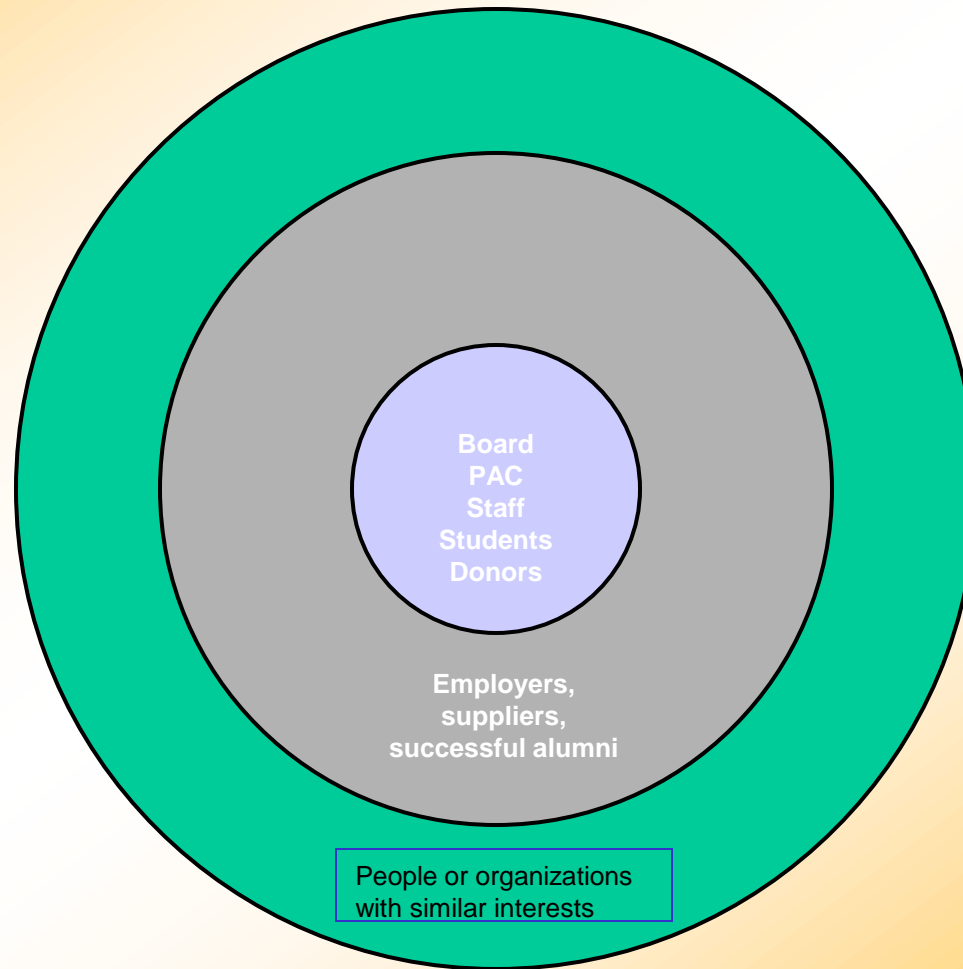
The Donor Development Process



Donor Development Cycle



The Constituency Circle



The Role of Volunteers

- **governance**
- **advocacy**
- **recruiting other volunteers**
- **programs**
- **development / fundraising**

Volunteer Needs

- **opportunities**
- **empowerment**
- **job descriptions**
- **orientation / training**
- **feedback**
- **recognition**

The Importance of Information Management

Information Needed

- **Individuals:** name, address, contact #s, spouse, employer
- **Organization:** name, address, contact #s, contact names
- **Giving history, volunteer involvement**
- **Link to the organization, giving ability, areas of interest, cultivation status**
- **Record of donor contact (call reports, briefing notes, action tracking, proposals submitted)**
- **Recognition and stewardship provided**

How is Information Used?

- **To identify potential donors along with their links, ability and interest**
- **To track gifts for receipting and recognition purposes**
- **To track giving patterns in order to determine recency, frequency and amount of gifts**
- **To track and coordinate actions/activities with the prospect/donor**

How is Information Collected?

- **Personal contacts**
- **Participation records (giving history, volunteer history, past contact between donor and charity)**
- **Public information (internet, newspapers, research sites, business journals, directories)**

Ethics and Confidentiality

- **FOIPP** (Freedom of information; protection of privacy)
- **APRA Code of Ethics:** Confidentiality, accuracy, relevance, accountability, honesty
- **Donor Bill of Rights**
- **Code of Ethical Fundraising Practices**

Stewardship

- **Communication**
- **Stewardship reports**
- **Newsletters**
- **Meeting with key individuals involved with the organization**
- **Invitation to events (e.g. ground breakings, awards ceremonies)**
- **Tours**

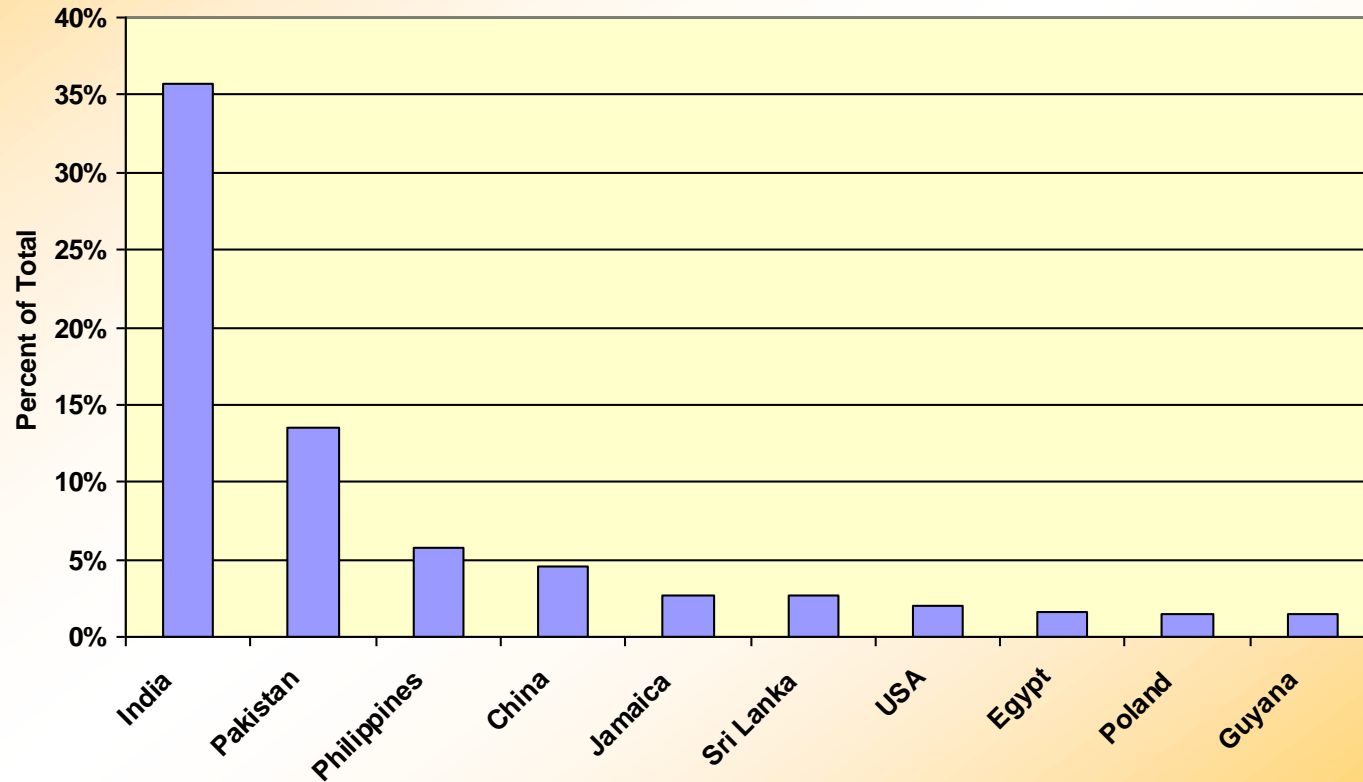
Recognition

- **Naming opportunities**
- **Donor walls**
- **Donor thank you events**
- **Plaques/mementos**
- **Thank you letters and phone calls**
- **Meetings with senior leadership**

Our Diversity Journey

Demographics

Immigrants By Place of Birth



Relationship Building

- **identifying leaders**
- **one on one meetings**
- **special reception**
- **formation of roundtable**
- **fundraising plans / activities for each group**
- **celebrations**

WOHS Vision

**“to design health systems
that serve the global
community...driven by
diversity”.**

**Thank You and
Questions?**