



**NATIONAL SPORT FEDERATION  
FUNDRAISING TOOLKIT**

**2016**

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## GETTING STARTED: CANADIAN OLYMPIC FOUNDATION ADVICE ABOUT FUNDRAISING IN SPORT

Philanthropy is commonly described as part science, part art. While true, it might better be described as part science, part art, all effort. If you are willing to invest time and effort, you will reap the rewards. A large financial investment is not required – a solid case for support and many conversations with prospective donors (free!) is all you need to get started.

Although the number of charities in Canada is growing annually, sport is unique. For the NSF's, there is only one "you". You are the only RCAA organization in the country that is dedicated to your sport, and this makes you the obvious (and only!) choice for those who are interested in your sport.

The very nature of your business means that there are many people in your universe who love your sport and are very dedicated to your sport. They include:

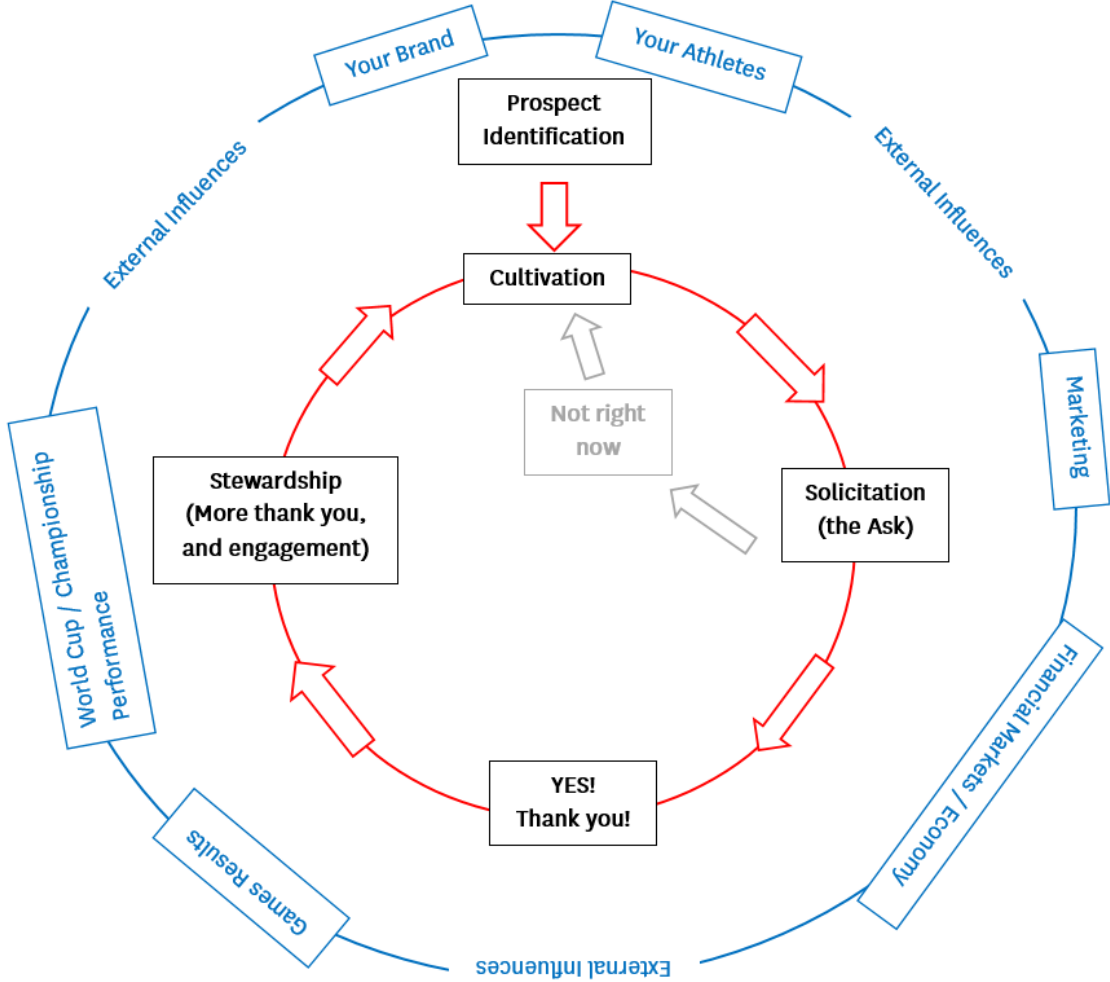
- Athletes
- Coaches
- Officials
- Volunteers
- Parents, Friends and Family of all of the above
- Recreational participants (in all of the above-mentioned categories)
- Fans
- Alumni (from both the competitive and recreational stream. Anyone who can say "I used to play..." or "I used to participate in..." is your alumni, as they identify themselves with your sport).

This is a very long list of individuals and a great place to start finding viable prospects and donors. You will need a database to track your interactions with this large group of prospective donors. From as sophisticated as stand-alone fundraising software to something as simple as excel, make sure you keep record of who gave what when, and who you are "courting" (cultivating) and all the various steps you have taken to get from "hello" to "thank you". The data will lead you to make better decisions in the future.

Fundraising is part science, part art, all effort. Sometimes you'll make mistakes, but most of the time you will get it right. You will raise funds that will allow you to support more programs, more coaches, more officials, more athletes, more teams. Roll up your sleeves, and let's get started!

# DONOR RELATIONS

The chart below shows the essentials of the fundraising cycle, from identifying a prospect as a potential donor to making a gift and renewing that gift on a regular basis. On the outside are all of the factors that influence that cycle, both positively and negatively. Some of these external influences we can control, many we cannot. In an effort to make the most positive influence on our donors and prospects, brand and marketing plays a critical role in fundraising activities.



The cycle is, as the word implies, circular. If each part is performed well, the circle will continue on and on and on.

Identification – Identify potential donors. The best sources are the Boards of Directors, athletes, coaches, officials, volunteers, parents, friends and family, fans, recreational participants and alumni. Marketing campaigns and events help to identify potential donors.

Prospects are often described as “qualified”. A qualified prospect has the following attributes:

- Interest in your cause
- Has the capacity to give
- Donates to other charities

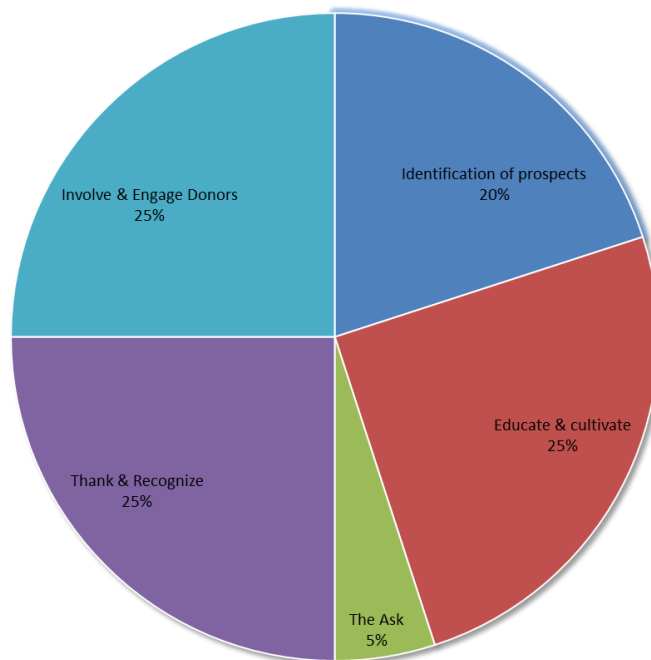
All three attributes are of equal importance.

Cultivation – Donors are cultivated through multiple and integrated communication channels including attending competitions, events, mailings (newsletters etc.), digital and social media channels, press announcements, and your marketing campaign and brand. Tell stories, share your results. Every time staff and volunteers meet with donors/prospects and talk positively about your NSF, you are helping to cultivate that donor/prospect. The more personal the connection, the stronger the bond and likelihood of a gift.

Solicitation – The obvious and important step of asking for a gift. In a recent US poll 75% of people who donate to charities said they did so “because I was asked”.

Stewardship – Sending a thank you note, recognition events, words of thanks, explaining how their donation makes a difference. Donors who feel good about their giving will give again. Sharing impact reports and athlete stories both personally and in a larger campaign are an important part of letting donors know the effect and power of their gift. Stewardship and cultivation utilize the same types of activities.

For many new to fundraising, “THE ASK” is the scary part. But as the pie chart below shows, the ask is actually the smallest part. While undoubtedly it is the most critical part, the reality is that you will spend most of your time getting people engaged in your sport. Likely something you already do very well!



Fans and people who buy tickets to your events are great prospects. They have demonstrated that they like your sport, and that they are willing to part with money (ie buy tickets) to attend. This is your advantage over many other charities – people are already paying money to be involved with you! They need to be cultivated and educated about your case for support: your needs and challenges and dreams. They need to be further engaged with your organization and then solicited for a donation.

## **FOUNDATIONS**

Public Foundations can be a great source of funding, but can also be time-consuming as the application process for each Foundation is quite different. You will have the best luck applying for grants from Foundations with which you have a personal connection; a board member or staff member at the Foundation that can help bring your organization to the top.

## **CORPORATE SPONSORSHIP**

Corporate Sponsorship is quite common in the sport and of course is very useful, but should not to be confused with philanthropy. Corporate sponsors very much want “something” in return for their gift and if you cease being able to provide that “something”, or you fall out of fashion, they may move on to other ventures. Advice around corporate sponsors is to absolutely try to attract and retain corporate sponsors, AND work on individual giving programs at the same time. Individual donors account for more charitable dollars in Canada. [While this data is old, it paints a very clear picture. In 2009, corporations gave \$2.3 billion, while individuals gave over \$10 billion].

## **PLANNED GIVING**

Planned giving is unfortunately the one fundraising method that is usually relegated to the bottom of the “to do” pile, as it is a very long process to receive a gift. That said, it is a relatively easy program to launch, and given the very loyal base of supporters and alumni at each sport organization, well worth a little effort!

Your primary goal is to market the program – to let people now that a) they can (and should!) make a provision for your organization and their will and b) how to do it. This could be as easy as including a check box for “please send me more information”. See the references section for sample language and forms. Once you have a donor (or board member or alumni!) who has included your organization in their will, tell their story online, in newsletters etc, as another way to market your program.

# RESOURCES BY FUNDRAISING METHOD AND LEVEL OF EXPERIENCE

## FUNDRAISING – GETTING STARTED

### Beginner

#### [\*Hot Topic: Fundraising Basics\*](#)

Available to members of the Association of Fundraising Professionals (AFP), this guide provides a detailed overview of the core elements of a fundraising program, links to key documents and further reading.

AFP membership information is available at:

<http://www.afpnet.org/About/content.cfm?ItemNumber=4126&navItemNumber=664>

#### [\*Fundraising Q & A: 15 points for building your fundraising plan\*](#)

This article by veteran fundraising and governance expert Cynthia J. Armour, CFRE outlines key considerations for developing a fundraising plan. Good introduction to fundraising, with links to related resources for further details.

#### [\*Samples by Supporting Advancement\*](#)

This webpage contains hundreds of samples of telephone scripts, direct mail copy and layouts, thank you letters and major gift proposals from a variety of organizations engaged in fundraising. Note that the content of this site is being migrated to a new website, [supportingfundraising.com](http://supportingfundraising.com).

Similarly, further samples are available to members of the Association of Fundraising Professionals under [\*Hot Topic: Samples, Forms and Documents\*](#).

#### [\*Fundraising 101\*](#)

This 16-minute TED Talk by Rueben Mayes, a former professional football player with 20+ years of experience on the fundraising field, provides a general introduction to fundraising and confronts some of the awkwardness or discomfort in engaging in fundraising and soliciting gifts.

#### [\*101fundraising Blog\*](#)

This crowdblog features weekly posts and discussions on best practices and hot topics in fundraising. A volunteer initiative by fundraisers for fundraisers. Guest bloggers include top fundraisers from Canada and around the world.

#### [\*Canadian Nonprofit Legal Information and Fundraising Trends/Data\*](#)

Charity law expert Mark Blumberg of Blumberg Segal LLP and his team assist nonprofits and charities in Canada in being transparent, legal, ethical and effective. A free newsletter subscription is available and workshops on specific and emerging issues are periodically offered.

Additional Book Recommendations



*Seeing through a Donor's Eyes: How to Make a Persuasive CASE for Everything from Your Annual Drive to Your Planned Giving Program to Your Capital Campaign* (2009) by Tom Ahern (167 pages)  
Cost: \$45 at [www.amazon.ca](http://www.amazon.ca)

*The Fundraiser's Guide to Irresistible Communications: Real-World, Field-Tested Strategies for Raising More Money* (2012) by Jeff Brooks (143 pages)  
Cost: \$46 at [www.amazon.ca](http://www.amazon.ca)

[\*The 11 Questions Every Donor Asks & The Answers All Donors Crave\*](#) – Revised Edition (2012) by Harvey McKinnon (115 pages)  
Cost: \$29.95

*Reality Check, Straight Talk about Sponsorship Marketing* (2014) by Brent Barootes with Janet Gadeski (202 pages)  
Cost: \$37.95

Asking Properly: [\*The Art of Creative Fundraising\*](#) (1996) by George Smith (220 pages)  
Cost: £24

[\*Tiny Essentials of Writing for Fundraising\*](#) (2003) by George Smith (65 pages)  
Cost: £9.95

## Intermediate

### [Imagine Canada – Sector Source](#)

This webpage provides a set of useful tools for building a fundraising program. The focus is primarily on foundation and corporate fundraising, with samples of policies and helpful templates. Also includes a 90-minute video on fundraising planning and general trends from grassroots fundraising expert Kim Klein. (American focus, but applicable to the Canadian context.)

### [Tips, Techniques and Strategies for Speaking to Donors on the Phone](#)

This 90-minute live webcast session from AFP Congress 2013 with Ottawa-based fundraiser Samantha Laprade, CFRE goes through some practical tips for engaging with donors over the phone.

### [CharityVillage eLearning](#)

This series of self-paced, web-based courses on key aspects of fundraising is fun, practical and easy-to-use. Additional resources are available for download.  
Cost per course: \$89 per user for three months' access; package deals are available.

## Additional Book Recommendations

*Asking Styles: Harness Your Personal Fundraising Power* (2012) by Andrea Kihlstedt (116 pages)

*The Essential Fundraising Handbook for Small Nonprofits* (2013) by Betsy Baker et al (280 pages)

## Advanced

### [Donor-Centered Fundraising](#) (2003) by Penelope Burk (227 pages)

This ground-breaking book remains a top resource for today's fundraisers and is a key tool in learning to engage and communicate with donors.  
Cost: \$65 (Imagine Canada members can borrow this book free of charge.)

Two related articles inspired by Burk's book are available on CharityVillage.com:

[\*Giving thanks: How an exceptional thank you is critical for retaining your donors\*](#) by Susan Fish;

[\*The single best thing nonprofits can do to raise money\*](#) by Vanessa Chase

### [What Canadian Donors Want](#)

This 60-minute webinar from the AFP Foundation for Philanthropy – Canada covers some general trends in donor behaviour based on a 2015 Ipsos Public Affairs survey of Canadian donors. Related slides are available for download.

### [The way we think about charity is dead wrong](#)

This 19-minute TED Talk by internationally renowned activist and fundraiser Dan Pallotta provides a provocative and thoughtful look at the way charities evaluate revenue/costs/outcomes.

### Additional Book Recommendation

*Relationship Fundraising: A Donor-Based Approach to the Business of Raising Money* – Second Edition (2002) by Ken Burnett (350 pages)

Cost: \$54

## SELF-ASSESSMENT TOOLS

### Beginner

#### [Fundraising Readiness Check](#)

This checklist from Creative & Cultural Skills in the UK provides a list of 13 basic elements in a fundraising program to assess an organization's readiness to engage in fundraising. Includes some general tips and is available in a PDF download.

#### [Self Audits Can Overcome Adult Audit Anxiety Disorder](#)

This article from Supporting Advancement broadly outlines the key questions that should be contained in a fundraising audit or self-assessment.

### Intermediate

#### [Imagine Canada – Standards Program](#)

Imagine Canada has established a set of standards for Canadian nonprofit organizations focusing on five areas: Board Governance, Financial Accountability and Transparency, Fundraising, Staff Management and Volunteer Involvement. There are two sets of standards for small and large nonprofits, and the list can be used as a reference or self-assessment tool. When a charity becomes a member of Imagine Canada and agrees to abide by these standards, this information can be shared with donors to increase credibility. The complete *Standards Program For Canada's Charities & Nonprofits* handbook is available in a PDF download.

### Advanced

*The Fundraising Audit Handbook* (2010) by Guy Mallabone, MA, CFRE and Ken Balmer, PhD (116 pages)

This audit workbook is based on fund development best practice and covers professional competency frameworks, training programs, books, papers and presentations to provide consensus on how best to go about the business of supporting philanthropy.

Cost: \$29.99 at [www.amazon.ca](http://www.amazon.ca) or \$34.95 at [hilborn-civilsectorpress.com](http://hilborn-civilsectorpress.com)

A [standalone questionnaire](#) for conducting a fundraising audit covers a variety of revenue streams and also explores related issues such as governance as it relates to the fundraising program.

## VOLUNTEERS

Volunteers can be a wonderful resource for organizations both large and small. But as the old saying goes, “you can't fire a volunteer” and thus care needs to be taken when bringing on volunteers. Expectations need to be understood and agreed upon prior to working with each other.

A great way to set expectations is to have job descriptions for the volunteer. Sample terms of reference for campaign cabinet co-chair and member are available in this toolkit. Adjust according to the needs of your organization and situation.

## **Beginner**

### [\*Fundraising Q&A: Helping your board to fundraise\*](#)

This article by veteran fundraising and governance expert Cynthia J. Armour, CFRE provides a broad overview of key considerations in getting a board involved in fundraising.

### [\*Board Fundraising Assessment Form\*](#)

This short checklist from the Association of Fundraising Professionals can help you assess your board's direct involvement in fundraising.

### [\*CharityVillage eLearning – Building a Great Volunteer Program\*](#)

This web-based course on how to develop a volunteer program has downloadable resources and a free position description template. A free six-question self-assessment quiz on volunteer management is also available. Learning outcomes:

- Describe how the five integrated parts of a volunteer management system can help you build a great volunteer program
- Illustrate how to prepare your organization for volunteers
- Design new volunteer positions or revise existing ones
- Use a variety of methods for finding new volunteers
- List the tools used in the screening process
- Support your volunteers so they stay with your organization for a long as possible

Cost: \$89 per user for three months' access.

### [\*Choosing a Donor Management System\*](#)

This article from Five Paths goes over six key steps in choosing a donor management system. Includes a required features table and a checklist which can be used when considering vendors and the system options they're offering.

## **Intermediate**

### [\*Getting The Best From Your Volunteers Through The SAVE Approach\*](#)

This CharityVillage webinar presented by veteran trainer and consultant Lori Gotlieb focuses on the S.A.V.E. Approach for volunteer management – screening, structure and support/supervision; attainable and attention; validate and value; and evaluate, encourage and end. A checklist, presentation slides and a worksheet are also available for download.

### [\*Volunteer Canada – Canadian Code for Volunteer Involvement\*](#)

Engaging volunteers presents a unique set of circumstances when it comes to ethics, recruitment and risk management. To help organizations better manage their volunteers, Volunteer Canada, the leading voice for volunteers in Canada, created the Canadian Code for Volunteer Involvement, a framework for involving volunteers in all levels of an organization, including those working in leadership, direct service and virtual roles. Available for download in a PDF format.

A [related self-assessment tool](#) which includes several checklists relating to various aspects of volunteer management and charity governance.

### Advanced

#### [The Changing face of volunteering in Canada](#)

This article by writer/editor Susan Fish of Storytell discusses how the traditional attitudes towards volunteering are in a state of flux, and how nonprofits can meet the challenges and opportunities of the changing face of volunteerism in Canada.

#### [Evaluation: Your tool to volunteer program success](#)

This article by fundraising consultant and trainer Lori Gotlieb addresses the need to continually evaluate your volunteer program to ensure ongoing program success. Includes questions to ask and a framework for working through an evaluation.

#### *The Volunteer Management Handbook – Second Edition (2011) by Tracy D. Connors (480 pages)*

This comprehensive reference book offers practical guidance on such essential issues as recruitment and motivating people to volunteer their time and services. Includes information on volunteer demographics, volunteer program leaders and managers, policy-making and implementation, planning and staff analysis, recruiting, interviewing and screening volunteers, and orienting and training volunteers. Available at several public libraries or for purchase.

Cost: \$63 at [www.amazon.ca](http://www.amazon.ca) or \$65 at [www.chapters.indigo.ca](http://www.chapters.indigo.ca)

## EVENTS

Events can be a good way to cultivate your prospects and steward your existing donors. Use them to your advantage: plant great volunteers/staff to sit with top prospects or donors. Plan your follow-up activities before the event, to ensure it isn't just a one-time event but that you are building a relationship.

As outlined briefly in the “donor relations” section, WHO is buying tickets is extremely valuable data. Make sure that your agreement with the venue gives you access to the list of ticket buyers. Use the data to build your database. Over time, the data will be very valuable for you to see who is attending more than one event. Or if they are attending in multiple cities/provinces they truly are an excellent prospect!

Events also give you the opportunity for people to “self-identify” that they are interested in learning more, in getting involved with you. For example, a small draw to win a free t-shirt by giving their contact information is great (build that database!) – but make sure that on the form is a check-box to receive emails/newsletters from you. Not only do you satisfy CASL compliance requirements, but it is also an indicator that someone wants more than to just win the t-shirt! In addition, you could ask age (which may help determine which prize they receive) in order to garner that information. Age is a great qualifier, as a 55-year old is more likely to be a donor than a 15 year old.

## Beginner

### [10 key steps to creating an extraordinary event](#)

This article by event planner and fundraising consultant Sharon Lechner discusses basic tips and tricks to help ensure event success.

### [Five Tips for Planning Your Next Fundraising Event](#)

This article by Laura Huddle, senior category manager at Eventbrite, details five key steps in planning a fundraising event.

### [Organize Cost-Effective Events](#)

This webinar from *The Chronicle of Philanthropy* is geared towards individuals new to organizing charity events. Learning outcomes:

- Engage volunteers wisely
- Use social media to attract supporters and enhance your event
- Avoid mistakes that can cut into your revenue

Cost: \$96US

### [Why can't you just get our Charity an Ice Bucket Challenge?](#)

This joint presentation by KCI (Ketchum Canada Inc.) and ALS Canada at the AFP Greater Toronto Chapter's 2015 Fundraising Day conference goes over the various factors that contributed to the success of the Ice Bucket Challenge fundraising campaign that went viral, as well as challenges for replication for other charities.

### [CharityVillage eLearning – Event Planning](#)

This web-based course on event planning has downloadable resources and a free sample event preparation timeline. Learning outcomes:

- Identify different types of events
- Develop an event plan
- List the nine essential steps in event planning
- Create an event budget
- Manage the myriad of details involved in event planning
- Identify and plan for possible risks
- Produce an event evaluation plan

Cost: \$89 per user for three months' access.

[CharityVillage](#) also offers a [Special Events Bundle for \\$350](#) – a discounted rate of 20% off individual course purchases. The online courses in this package include:

- Event Planning
- Building a Great Volunteer Program
- Attracting Corporate Sponsorship
- Budgeting for Nonprofits
- Receipting Charitable Gifts in Canada

### **Intermediate**

*Money for the Cause: A Complete Guide to Event Fundraising* (2012) by Rudolph A. Rosen, Ph.D. (296 pages)

In this book, veteran nonprofit executive director Rudolph Rosen lays out field-tested approaches that have been among those that helped him and the teams of volunteers and professionals he has worked with raise more than \$3 billion for environmental conservation, ranging from elite black-tie affairs to basement banquets and backyard barbeques. Available at the Toronto Public Library or for purchase. Cost: \$44 at [www.amazon.ca](http://www.amazon.ca)

### **Advanced**

*Special Events: Proven Strategies for Nonprofit Fundraising* – 2nd Edition (2003) by Alan L. Wendroff (272 pages)

This comprehensive resource on special event strategies includes such helpful tools as seven goals for a successful event, the Master Event Timetable – a proven organizational tool that provides step-by-step guidance through the entire event process, sample worksheets, checklists and tables. Also includes a case study which runs throughout the book, showing in practical detail how to implement the advice and methods outlined.

Cost: \$85 at [www.amazon.ca](http://www.amazon.ca)



## ANNUAL CAMPAIGN

The annual campaign provides sustainable and predictable revenue. Treat your donors well, keep them informed and engaged, and they will renew their gifts year after year.

In traditional charities donations peak in the spring (before Easter) and in the late fall (before the Holiday). Happily, in sport you have another focal point: major championships including Nationals, Worlds and the Olympics. Annual fund solicitations are best sent in advance of such events when anticipation and the desire to “do something to help” is highest.

For context, the Canadian Olympic Foundation always raises more funds in advance of the Olympic Games, even if the performance AT Games is stellar. Despite donors likely knowing that donating 6 weeks in advance of Games probably won't help win a medal, they are still inspired to give. Post-Games there is a certain fatigue, and the next Olympics seems so far away that funding is not seen as a priority.

Due to the relatively lower size of the gift, annual giving campaigns aren't subject to changes in the economic climate, as opposed to corporate sponsorship which tends to shrink when the economy is fragile.

Direct mail donors are older, usually over 65 years of age. Interestingly, people who have given in different ways (online, for example) tend to switch to responding to direct mail when they reach 65 years of age. Thus the “older generation” who give via mail isn't shrinking each year, it is simply changing. Direct mail seems old-fashioned, but it works for the older demographic.

### Beginner

#### [\*Direct Mail Checklist\*](#)

An annual giving program typically relies heavily on direct mail for communication and solicitation.

This sample checklist from SupportingAdvancement provides key considerations for conducting a direct mail campaign.

#### [\*How To Launch a Direct Mail Program: What every fundraiser should know\*](#)

This white paper by Suzanne Newell, an account manager with Blackbaud, Inc.'s Target Analytics, goes over the key considerations for launching a direct mail campaign, including pros and cons, common pitfalls and critical components.

#### [\*Online Fundraising\*](#)

CanadaHelps.org works with over 16,000 charities to grow their online fundraising programs using secure, easy-to-use tools – optimized for impact and provided at affordable, nonprofit rates. Tools include online donations, peer-to-peer fundraising (i.e., events such as runs or walks in which participants fundraise among their personal networks) and donations of securities (stocks). CanadaHelps.org also offers training on online fundraising.

### Intermediate

*The Annual Campaign* (2009) by Erik J. Daubert (312 pages)

This book reveals how to run a well-managed and well-coordinated annual campaign effort from the perspective of a large or small nonprofit organization. Includes step-by-step guidance, practical tools, annual campaign checklists, sample pledge cards and more.

Cost: \$63 at [www.amazon.ca](http://www.amazon.ca)

### Advanced

*Donor Focused Strategies for Annual Giving* (2003) by Karla A. Williams (287 pages)

This book takes a look at annual giving from the donor's perspective to help you better match donor interests to your organization's needs. It shows how to implement an annual integrated development program – the most donor-sensitive, effective fundraising strategy for the long term.

Cost: \$78 at [www.amazon.ca](http://www.amazon.ca)

### Additional Book Recommendations

*Fundraising Fundamentals: A Guide to Annual Giving for Professionals and Volunteers* (2002) by

James M. Greenfield (600 pages)

Cost: \$69 at [www.amazon.ca](http://www.amazon.ca)

## MAJOR GIFTS

Every charity and not-for-profit dreams of having a major gifts program. Larger gifts with a lower cost of acquisition – what’s not to love!

Major gifts campaigns follow the very same development cycle outlined in the “Donor Relations” section, but with more attention and effort. It’s logical: the larger the gift, the more time you want to spend with that donor.

Major gifts prospects and donors require personal attention from people at the top of the organization, including the CEO, Board Chair/President and other senior leaders. Major gifts donors want to feel that their gift is having an impact, they want to know first-hand how things are faring as they are truly committed to your organization. They should never learn from Twitter that the upcoming game is your last chance to qualify, they should never learn from the news that one of your athletes is injured and will miss the rest of the season. They are on the inside, they need to hear it from you personally, and immediately. Depending on the nature of the news, a quick email before it goes public, and phone call, a conversation. Do not underestimate the power of a phone call to your donor.

### Beginner

#### [How to prepare for a successful major gift request](#)

This webinar presented by Bloom Non Profit Consulting Group discusses the importance of face-to-face fundraising for major gifts and offers strategies, tools and techniques for making a major gift request, including real-life examples that have been successful. Links to the webinar and related content are available at [CharityVillage.com](http://CharityVillage.com).

#### [Training Volunteers to Make Calls!](#)

This presentation from KCI (Ketchum Canada Inc.) goes through the many steps in a major gift solicitation, examples of things to say and next steps to various donor responses.

### Intermediate

#### *Fundraising Realities Every Board Member Must Face: A 1-Hour Crash Course on Raising Major Gifts for Nonprofit Organizations – Second Edition (2013) by David Lansdowne (108 pages)*

This book is a quick read and includes checklists for assessing your major gift program.

Cost: \$24.95US at [emersonandchurch.com/bookstore](http://emersonandchurch.com/bookstore) or \$60CAD at [www.amazon.ca](http://www.amazon.ca)

#### [Gift Chart Calculator](#)

This online tool from Blackbaud, Inc. allows a fundraiser to input a target fundraising amount, and then a built-in calculator breaks down the goal into a gift chart outlining possible gift ranges and the number of donations and prospects required at each level to achieve that target.

### [\*R U Really Ready to Launch a Campaign?\*](#)

This presentation from KCI (Ketchum Canada Inc.) at the 2015 CCAE Conference (Canadian Council for the Advancement of Education) covers the many considerations of launching a campaign, as well as key components and steps of a successful one.

## **Advanced**

### [\*Prospect Research & Prospect Management\*](#)

Prospect research uses a variety of tools to identify prospective donors and determine their ability to give, affinity for your cause and connection to your organization. Samples and templates of donor profiles and other research tools are available for download from the Prospect Research Institute, with contributions by ASPIRE Research Group and others.

Prospect management refers to the task of managing your organization's major donors and prospective major donors through the fundraising cycle. David F. Lamb, a senior consultant with Blackbaud, Inc.'s Target Analytics, created a white paper on *The Basics of Prospect Management* which goes over the essential steps of prospect management. [Available as a PDF download.](#)

*Face Time: Relationship Philanthropy* (2007) by Robert Ian Peacock, M.A., CFRE (110 pages)

This comprehensive resource on major gift fundraising in Canada helps both practitioners and volunteers understand how to achieve professional excellence in the stewardship of supporters, secure genuine and lasting relationships with major donors through 'high-touch' relationship philanthropy, and succeed in their greater goal of helping people benefit others through philanthropy.

Cost: \$42 at [hilborn-civilsectorpress.com](http://hilborn-civilsectorpress.com)

## **Additional Book Recommendation**

*Major Gift Fundraising for Small Shops: How to Leverage Your Annual Fund in Only Five Hours per Week* (2014) by Amy Eisenstein (170 pages)

Cost: \$41 at [www.amazon.ca](http://www.amazon.ca)

# FOUNDATION & CORPORATE FUNDRAISING

## Beginner

### [\*Is Your Nonprofit Ready to Apply for Foundation Grants?\*](#)

This article from About Money goes over a series of questions and considerations when preparing to engage in foundation fundraising. (American focus, but applicable to Canadian context.)

### [\*The Sponsorship Collective\*](#)

Sponsorship and cause marketing expert Chris Baylis blogs on best practices, strategies and trends in this area of corporate fundraising. Offers free webinars and a free sponsorship proposal template for download.

### [\*The Bottom Line\*](#)

Corporate partnership leader Bernie Colterman blogs on a variety of fundraising and marketing topics, including sponsorship development and sponsorship evaluation. Holds events and workshops such as a Sponsorship Boot Camp, offers on-demand webinars and provides free resources.

## Intermediate

### [\*Imagine Canada – Sector Source\*](#)

This webpage provides a number of resources on corporate fundraising in Canada, including sample policies, a corporate sponsorship toolkit and commentary on the state of corporate fundraising in Canada.

### [\*CharityVillage eLearning – Grantseeking\*](#)

This web-based course on grant research and proposals has downloadable resources and a free sample prospect screening worksheet. Learning outcomes:

- Explain the five steps in grantseeking
- Describe what factors are significant when researching funders
- State why building a relationship with a funder is an important key to success
- Explain how to follow up effectively after submitting a proposal

Cost: \$89 per user for three months' access.

### [CharityVillage eLearning – Sponsorships](#)

This web-based course on corporate sponsorships includes downloadable resources. Regardless of your organization's size or focus, you too can build lasting and valuable partnerships with corporate sponsors. Learning outcomes:

- Provide examples of trends in corporate giving
- Clarify the difference between a sponsorship and a donation
- Explain the benefits of the sponsorship relationship from both the corporate and the nonprofit viewpoints
- Develop a list of sponsorship opportunities for your organization
- Create a master list of sponsorship benefits you can offer a corporate sponsor
- Explain the difference between media sponsorship and editorial coverage
- Identify corporate sponsorship prospects
- Produce the documents and cultivation tools to secure, maintain and grow a corporate relationship

Cost: \$89 per user for three months' access.

### **Advanced**

*Corporate and Foundation Fund Raising: A Complete Guide from the Inside* (1996) by Eugene A. Scanlan (276 pages)

This step-by-step guide provides a total and comprehensive strategic approach to fundraising. Includes a wealth of hands-on techniques, strategy tips, real-life examples, war stories, time-saving forms, suggested readings, a glossary and an extensive bibliography. (American focus, but applicable learnings for Canadian fundraisers.)

Cost: \$93 at [www.amazon.ca](http://www.amazon.ca) or \$95 at [www.chapters.indigo.ca](http://www.chapters.indigo.ca)

# PLANNED GIVING

## Beginner

### [\*Our early indicator that growth isn't just possible, it's underway\*](#)

This short article by Brock Warner, Manager, Development at War Child Canada explains why a small, young charity would consider and engage in a planned giving program.

### [\*Get Ready to Start a Planned Giving Program!\*](#)

This white paper by Katherine Swank, J.D., a senior consultant at Blackbaud, Inc.'s Target Analytics covers the basic elements and conditions for developing a planned giving program.

### [\*The Canadian Association of Gift Planners\*](#)

This nationwide professional association is dedicated to planned giving and provides a series of workshops and events throughout the year for this fundraising stream.

## Intermediate

### [\*CharityVillage eLearning – Planned Giving\*](#)

This web-based course on planned giving has downloadable resources and a free sample resource on planned giving terms and definitions. Learning outcomes:

- Describe planned giving, using an easy-to-understand definition
- List the most common types of planned gifts
- Decide whether your organization is ready to start a planned giving program
- List the 10 steps in creating a successful planned giving program
- Explain how planned giving and endowment-building are related

Cost: \$89 per user for three months' access.

## Advanced

[\*Planned Giving for Canadians\*](#) – Third Edition (2007) by Frank Minton, Ph.D. and Lorna Somers  
This comprehensive resource on planned giving is for both the charitable sector and those working in partnership with charities, including lawyers, accountants, bankers, financial managers, estate planners and insurance professionals. The manual addresses such topics as gift techniques, bequests and life insurance, endowments, tax rules for charitable gifts in Quebec, major gift strategies, developing personal solicitation skills and international planned giving. The text is now produced in an electronic format and was last updated in 2015.  
Cost: \$100 or free for members of the Canadian Association of Gift Planners members.

## KEY ISSUES IN THE CHARITY SECTOR & FUNDRAISING

### [\*Finding Charity Salaries\*](#)

This LinkedIn post by veteran fundraiser Ann Rosenfield, MBA, CFRE shows how to find information on employee compensation in the charity sector using public filings through the Canada Revenue Agency (information includes salary information for top-paid employees and overall spending on compensation).

### *Recruitment*

Fundraising jobs can be posted online with CharityVillage and local Canadian chapters of the Association of Fundraising Professionals. Cost varies per organization.

<http://charityvillage.com/>

<http://www.afpnet.org/AFPCanada/>

### [\*Privacy Policy Checklist\*](#)

This tipsheet from Charity Central details the considerations and regulatory requirements for charities in designing a donor privacy policy. Includes a checklist for management of donor records, use of donor data for fundraising and marketing, as well as disclosure and access.

### [\*Hilborn Charity eNEWS\*](#)

Hilborn has been updating Canadian nonprofit leaders on news, trends, tips and analysis of developments in the fields of fundraising and nonprofit management since 1991. Offers a free subscription to *Charity eNEWS*, a weekly publication with articles on different fundraising topics. Hilborn's Civil Sector Press has an online bookstore that carries a variety of fundraising and nonprofit management books.

### [\*Philanthropic Trends Quarterly\*](#)

This popular newsletter from KCI (Ketchum Canada Inc.) provides brief overviews of key issues in the Canadian philanthropic sector. Each issue focuses on a particular theme. Past issues have included topics such as fundraising costs, prospect pipelines, multicultural fundraising and donor communication.



### [TechSoup Canada Blogs](#)

TechSoup is a nonprofit organization which provides IT equipment and advice to charities. Posts cover a variety of topics about fundraising and technology. Recent topics covered include developing an online fundraising presence, running Google Ad campaigns and technology assessments.

Additionally, [TechSoup shares case studies](#) of small charities using technology tools for success.

### *Charity Law Resources*

[Blumbergs' Charity Law List](#) and [Canada Revenue Agency's Electronic mailing list](#) – Charities and giving are two free subscription-based resources which provide regular updates on charity law, of particular importance for accountability and transparency.

### [Imagine Canada – Sector Source: Charity Tax Tools](#)

This webpage features a collection of resources about the basic legal requirements for all Canadian charities that are registered with Canada Revenue Agency and entitled to issue tax receipts for charitable donations.

### [Measuring and Reporting Fundraising Costs: A Guideline for Board Members](#)

Although from 2008, this report by the Association of Fundraising Professionals covers key considerations in examining fundraising costs and is targeted to board members responsible for overseeing decisions related to fundraising investments.

### [Current Articles by GuideStar](#)

GuideStar, an American organization that has up-to-date information on thousands of U.S. nonprofits, has produced a series of short articles on a variety of fundraising topics which can be of interest for further reading.

### [Association of Fundraising Professionals Code of Ethical Procedures and Standards](#)

This documents details the guidelines for ethical behaviour and practices in fundraising which all AFP members subscribe to.

### [A Donor Bill of Rights](#)

This document outlines the rights and reasonable expectations of donors engaging with charities. It was developed by four professional associations, including the Association of Fundraising Professionals.



## **APPENDIX: TEMPLATES**

# FUNDRAISING CABINET TERMS OF REFERENCE

## **Purpose:**

The mandate of the Fundraising Cabinet is to assist in the planning, coordination and implementation of fundraising activities to raise private sector funds (individual donors, corporations and sponsors), in support of the Campaign.

## **Objectives:**

1. Assists in the development of the strategic direction and plans for the fundraising campaign.
2. Implement, monitor and evaluate the fundraising strategy once it is adopted.
3. Actively assist in fulfilling fundraising objectives by managing interactions with donors and sponsors, including soliciting gifts or in-kind services, thanking donors/sponsors in writing and keeping them abreast of campaign progress.
4. Identify and maintain a list of existing and potential sponsors and funders.
5. Assume the lead for certain fundraising activities, such as fundraising events or dinners.

## **Cabinet Composition:**

The Cabinet shall be composed of:

- One Chair or two Co-Chairs, preferably with experience in fundraising
- Members, upon recommendation of Staff, the board and the Chair (or Co-Chairs). Preferably with experience in fundraising.
- Executive Director or CEO
- Fund development staff (alternately marketing and/or communications staff)
- A representative of the Board

## **Term:**

The term is for the duration of the campaign, as outlined in the Campaign plan.

## **Meetings:**

The Cabinet will meet 8 times a year, and will attempt to have at least half of these meetings in person. Additional meetings may be held at the discretion of the Chair or Co-Chairs.

Minutes that reflect all significant decisions of the Cabinet shall be kept at all regular meetings.

## **Reporting Relationship:**

The Cabinet will report regularly to the Board through the Board representative on the Cabinet. The Cabinet will report to the Membership at the Annual General Meeting.

# CAMPAIGN CABINET CO-CHAIRS JOB DESCRIPTION

## PURPOSE

The Campaign Cabinet comprises of a dedicated team of volunteers seeking to raise funds to support athletic excellence in the sport of SPORT. The fundraising campaign will focus on **STATE PURPOSE OF CAMPAIGN**.

The Campaign Cabinet Co-Chairs provide leadership and strategy for the Campaign and the Cabinet. They participate in the identification, cultivation and solicitation of donors to the Campaign, are ambassadors for the Campaign, make a personal gift, participate and host cultivation events.

## TERM

The Campaign Cabinet Co-Chairs serve until the close of the Campaign, at the end of **DATE**.

## KEY RESPONSIBILITIES

### Campaign Leadership

- Overall responsibility for overseeing the Campaign plan
- Provide strategies with a view to improving the Campaign, and take necessary actions to ensure that strategic initiatives are implemented
- In consultation with **NSF**, be a public spokesperson and ambassador for the Campaign by making statements in the media and urging participation on the part of prospective donors
- Assist in the recruitment of Cabinet members.
- Oversee the formation of regional sub-committees as necessary—this may include helping to enlist additional volunteers
- Encourage the Cabinet members to make their personal donations
- Initiate and encourage ideas and suggestions for the Campaign
- Review each Cabinet member's progress with staff and provide encouragement when needed
- Approve any communication that goes out with the Chair's name
- Anticipate problems and issues and take appropriate action as necessary
- Participate in Board conference call meetings, as appropriate, to update the Board on Campaign progress

### Solicitations

- Identify prospects who may be interested in making a donation
- With the assistance and guidance of **NSF** staff and other volunteers, host cultivation events and activities by attending the events, bringing prospects, talking to attendees about the Campaign
- Solicit prospect donations

- Keep your prospects and donors informed about Campaign and SPORT news and events – through phone calls, in-person conversations and written communications
- Liaise with staff regularly to update on progress of your prospects and any follow up required by staff

#### Cabinet Meetings

- Call and run Cabinet meetings or conference calls including setting dates and reviewing the agenda
- Prepare for each meeting by reviewing contact reports and notes of previous meeting with staff
- Report on the progress of your prospect cultivation and solicitation
- Encourage members to share triumphs and challenges that can be discussed with the Cabinet

#### Qualifications

- A passion for the sport of SPORT
- A desire to introduce friends and associates to NSF
- Interest in advancing the strategic goals of NSF
- A donor to the campaign

# CAMPAIGN CABINET MEMBER JOB DESCRIPTION

## PURPOSE

The Campaign Cabinet comprises of a dedicated team of volunteers seeking to raise funds to support athletic excellence in the sport of **SPORT**. The fundraising campaign will focus on **STATE CAMPAIGN PURPOSE**.

The Campaign Member is an integral part of the Campaign Cabinet; a role that focuses specifically on the identification, cultivation, solicitation and stewardship of prospects and donors.

## TERM

The Campaign Cabinet Members serve until the close of the Campaign, at the end of **DATE**.

## WORKING RELATIONSHIPS

Cabinet members work closely with Cabinet Co-Chairs, as well as with staff of the **NSF**.

## KEY RESPONSIBILITIES

### Solicitations

- Identify prospects who may be interested in making a donation
- With the assistance and guidance of staff and other volunteers, cultivate prospects, which may include setting appointments and attending meetings, tours, attending and hosting events
- Solicit prospect donations
- Personalize your communications as appropriate
- Liaise with staff regularly to report on progress of your prospects
- Assist in cultivation events and activities by attending the events, bringing prospects, talking to attendees about the Campaign
- Keep your prospects and donors informed about Campaign and **SPORT** news and events – through phone calls, in-person conversations and written communications
- Make recommendations and initiate strategies to improve the Campaign

### Cabinet Meetings

- Attend, and actively participate in, as many Cabinet meetings as possible
- Prepare for each meeting by reviewing contact reports and notes of previous meeting
- Report on the progress of your prospect cultivation and solicitation
- Be prepared to share triumphs and challenges that can be discussed with the Cabinet

## Qualifications

- A passion for the sport of **SPORT**
- A desire to introduce friends and associates to **NSF**
- Interest in advancing the strategic goals of **NSF**
- A donor to the campaign



## PLANNED OR LEGACY GIVING SAMPLE – CANADIAN OLYMPIC FOUNDATION

The Canadian Olympic Foundation (COF) is a national charitable organization that generates support to meet the technical, scientific, medical and coaching needs of Canada's athletes across all Olympic sports. Established in 2007 by the Canadian Olympic Committee (COC), the COF has granted more than \$30M to programs to help Canadian athletes live, train and prepare for Olympic competition. The Foundation is supported by donors, corporate partners, special events and other programs.

Planning a legacy gift to the Canadian Olympic Foundation demonstrates your love of sport and your investment in high performance athletes and the Canadian sport system. Your commitment for the future will celebrate Canadian excellence in high performance sport for generations of athletes.

A legacy gift allows you the satisfaction and joy of knowing that you are contributing to the ongoing success of the Canadian Olympic movement and will not affect your income during your lifetime. In addition, gifts made to charitable organizations offer significant tax benefits and a bequest to the COF will reduce the amount of taxes owed by your estate.

### Bequests

The following sample language is intended as a resource when making a bequest to the Canadian Olympic Foundation. *There are several options in making a bequest; you should seek legal and/or financial counsel to ensure that your intentions are clearly defined in your Will and that the type of bequest best suits your financial situation and philanthropic goals.*

I give the **Canadian Olympic Foundation/Fondation olympique canadienne**, located at 21 St. Clair East, Suite 900, Toronto, ON M4T 1L9 with the charitable registration number 81772 9346 RRO01, the sum of \$\_\_\_\_\_ to be used in a manner that the Canadian Olympic Foundation deem appropriate.

OR

I give the **Canadian Olympic Foundation/Fondation olympique canadienne**, located at 21 St. Clair East, Suite 900 Toronto, ON M4T 1L9 with the charitable registration number 81772 9346 RRO01, \_\_\_% of my estate to be used in a manner that the Canadian Olympic Foundation deem appropriate.

In gifting a bequest, donors should consider providing the COF with a copy of the clause in the Will pertaining to the bequest. This will be particularly helpful for receipting the estate at the appropriate time.

### Life Insurance

Life insurance is another way to make a legacy gift. By purchasing a life insurance policy, a donor can donate a larger sum while enjoying tax savings. *There are several options in making a gift of life insurance; you should seek legal and/or financial counsel before proceeding with a planned gift.*

The following three options exist to donate a life insurance policy:

Purchase a new policy. If you name the COF as the irrevocable owner and beneficiary of the policy, you will receive tax receipts for all the premium payments that you make.

Donate an existing policy. Old policies that are no longer needed by the donor or donor's family can create current tax benefits. If you name the COF as the irrevocable owner and beneficiary of a paid-up policy, you will immediately receive a tax receipt for the cash surrender value of the policy.

Name the COF as the beneficiary of a new or existing policy. Your estate will receive a tax receipt for the face value of the policy when the gift is realized.

The benefits of donating Life Insurance include the pleasure of making a significant gift to the COF by making relatively small payments toward a life insurance policy over several years. The proceeds pass quickly to the COF free of taxes, fees and probate costs, and your gift does not reduce the value of your estate for your heirs.

Unless otherwise directed by the donor, the Canadian Olympic Foundation endows all legacy gifts. Endowed gifts are invested in perpetuity, with grants of no less than 3.5% made annually. Legacy gifts ensure that the Canadian Olympic Foundation can continue to support new initiatives and programs, continue funding current ones and serve future generations of athletes. Your legacy gift will truly continue to give beyond your lifetime.

For further information on bequests, life insurance or other planned giving opportunities, please contact Selga Apse, Director, Business Operations, at 416 324 4297 or [sapse@olympic.ca](mailto:sapse@olympic.ca).

Thank you for considering the Canadian Olympic Foundation.

Date

Name

Address

City, PR POS COD

Dear Name,

You recently indicated that you would like to receive more information about making a planned gift to the Canadian Olympic Foundation.

Planning a legacy gift to the Canadian Olympic Foundation demonstrates your love of sport and your investment in high performance athletes and the Canadian sport system. Your commitment for the future will celebrate Canadian excellence in high performance sport for new generations of athletes. In addition, a bequest to the COF will reduce the amount of taxes owed by your estate.

Unless otherwise directed by the donor, the Canadian Olympic Foundation endows all legacy gifts. Endowed gifts are invested in perpetuity, with grants of no less than 3.5% made annually. Legacy gifts ensure that the Canadian Olympic Foundation can continue to support new initiatives and programs, continue funding current ones and serve future generations of athletes. Your legacy gift will truly continue to give beyond your lifetime.

There are several ways in which you can make a planned gift, but the most popular are a Bequest in your Will, or a gift of Life Insurance. I do not have a fancy brochure to send you, but below I include the information you need to make such provisions for the Canadian Olympic Foundation.

### Bequests

The following sample language is intended as a resource when making a bequest to the Canadian Olympic Foundation. *There are several options in making a bequest; you should seek legal and/or financial counsel to ensure that your intentions are clearly defined in your Will and that the type of bequest best suits your financial situation and philanthropic goals.*

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OR

I give the **Canadian Olympic Foundation/Fondation olympique canadienne**, located at 21 St. Clair East, Suite 900 Toronto, ON M4T 1L9 with the charitable registration number 81772 9346 RRO01, \_\_\_% of my estate to be used in a manner that the Canadian Olympic Foundation deem appropriate.

In gifting a bequest, donors should consider providing the COF with a copy of the clause in the Will pertaining to the bequest. This will be particularly helpful for receipting the estate at the appropriate time.

## Life Insurance

Life insurance is another way to make a legacy gift. By purchasing a life insurance policy, a donor can donate a larger sum while enjoying tax savings. *There are several options in making a gift of life insurance; you should seek legal and/or financial counsel before proceeding with a planned gift.*

The following three options exist to donate a life insurance policy:

Purchase a new policy. If you name the COF as the irrevocable owner and beneficiary of the policy, you will receive tax receipts for all the premium payments that you make.

Donate an existing policy. Old policies that are no longer needed by the donor or donor's family can create current tax benefits. If you name the COF as the irrevocable owner and beneficiary of a paid-up policy, you will immediately receive a tax receipt for the cash surrender value of the policy.

Name the COF as the beneficiary of a new or existing policy. Your estate will receive a tax receipt for the face value of the policy when the gift is realized.

The benefits of donating Life Insurance include the pleasure of making a significant gift to the COF by making relatively small payments toward a life insurance policy over several years. The proceeds pass quickly to the COF free of taxes, fees and probate costs, and your gift does not reduce the value of your estate for your heirs.

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A legacy gift allows you the satisfaction and joy of knowing that you are contributing to the ongoing success of the Canadian Olympic movement and will not affect your income during your lifetime.

If you have already determined that you would like to include the Canadian Olympic Foundation in your estate plans, please complete the attached Planned Gift Confirmation Form and return to me in the envelope provided.

If you have any questions, please don't hesitate to contact me at 416 324 4297 or [sapse@olympic.ca](mailto:sapse@olympic.ca).

Thank you for considering the Canadian Olympic Foundation.

Sincerely,

Selga Apse

Director, Business Operations

# GIFT AGREEMENT

**THE DONOR** (the “Donor”)

AND

CANADIAN OLYMPIC FOUNDATION (the “COF”)

**Establishment** **THE DONOR** (hereinafter “Donor(s)”) hereby donates \$X (the “Gift”) as a charitable gift to the Canadian Olympic Foundation (“COF”) as per the terms of this agreement. This gift will be made in installment payments. The details are contained in the section titled “Funding.”

**Purpose of Gift** The Gift will be directed to insert here the purpose of the gift. Include as much detail as possible without restricting yourself in the future. For example saying the gift is to support the national team is good, saying it’s for the senior men’s national team to be used for Olympic preparation is going to severely limit the use of funds if the men’s team fails to qualify.

## Donor’s Contact Information

First and last name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone number: \_\_\_\_\_ ( ) \_\_\_\_\_

Email address: \_\_\_\_\_

**Funding** The Donor intends to fund this Gift with a cash gift in four installments totaling \$X.

The Donor will make pledge payments on the Gift as follows:

\$X on or before October 30, 2016;

\$X on or before October 30, 2017;

\$X on or before October 30, 2018; and

\$X on or before October 30, 2019.

The COF will send a pledge reminder to the Donor in September of each year.

**Recognition** In appreciation and recognition of the Gift, the Donor will be recognized by the COF as a Donor until July 2020.

For purposes of print recognition, the Donor wishes to have their name listed as:

\_\_\_\_\_

Recognition includes:

Tax receipt in the full amount of your gift

Recognition as a supporter on COF website [www.olympicfoundation.ca](http://www.olympicfoundation.ca)

Annual impact report to learn how your investment is directly making a difference for future Olympians; and the COF’s quarterly newsletter

**Amendment** This agreement may be amended in writing by the mutual consent of the COF and the Donor.

\_\_\_\_\_

Donors Signature(s)

~~Donors Name(s)~~ \_\_\_\_\_

~~Date~~ \_\_\_\_\_

~~COF Signature~~ \_\_\_\_\_

~~COF Name and Title~~ \_\_\_\_\_

~~Date~~ \_\_\_\_\_

## PLANNED GIFT CONFIRMATION FORM

A planned gift to the Canadian Olympic Foundation demonstrates your love of sport and your investment in high performance athletes and the Canadian sport system. Your commitment for the future will celebrate Canadian excellence in high performance sport for new generations of athletes. If you have made or intend to make a planned gift to the Canadian Olympic Foundation, please take a moment to complete this **confidential** form and return it to us so that we may know of your generous intent.

\_\_\_\_\_ I/we have already included the Canadian Olympic Foundation in my estate plans.

\_\_\_\_\_ I/we intend to make a planned gift to the Canadian Olympic Foundation.

|  |                  |
|--|------------------|
| Donor's Name(s): _____<br>(please print) | Email: _____     |
| Address: _____<br>(Apt., Street Address) | Telephone: _____ |
| _____                                    |                  |
| (City, Province, Postal Code)            |                  |
| Donor's Signature(s): _____              | Date: _____      |

### Optional Information

Please note: by stating an amount your estate is not legally bound by this statement. You may choose to add, subtract or revoke this bequest at any time, at your sole discretion.

I confirm the following provision for Canadian Olympic Foundation:

- ❖ Bequest in the amount of \$\_\_\_\_\_ or \_\_\_\_% of the residue of my estate.
- ❖ Beneficiary of a life insurance policy with the face value of \$\_\_\_\_\_.  
Name of Insurance Company \_\_\_\_\_.
- ❖ Beneficiary of my RRSP, RIF or pension plan in the amount of \$\_\_\_\_\_ or \_\_\_\_% of this plan.
- ❖ Other (please specify)\_\_\_\_\_.

### Recognition

The Canadian Olympic Foundation would like to recognize your generosity. Your name, if you agree, will be included in publications and listed wherever donors are listed. By letting others know of your generosity, they will be encouraged to join you in making a legacy gift.

- Yes, please recognize my/our legacy gift as:\_\_\_\_\_.
- I/We wish to remain anonymous.

# PLEDGE REMINDER

**NAME** [Fill in this part – you know who they are! Don't make them do the work]

**ADDRESS**

**EMAIL** **PHONE**

Thank you for your ongoing generous support of the Canadian Olympic Foundation (“COF”) and the Future Olympians Fund. Our records indicate that your next pledge payment is now due.

| Amount Owing | Notes   |
|--------------|---|
| \$5,000      | Payment received on December 15, 2015. Thank you! |
| \$5,000      | Payment due on or before December 31, 2016        |
| \$5,000      | Payment due on or before December 31, 2017        |
| \$5,000      | Payment due on or before December 31, 2017        |
| \$20,000     | TOTAL PLEDGE                                      |

You could highlight the payment that is currently due, but giving them the entire schedule is a good reminder.

Please use this form to submit your payment.

**Credit Card** VISA  MASTERCARD  AMERICAN EXPRESS

Name as it appears on Card \_\_\_\_\_

Card Number \_\_\_\_\_ Expiry: \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_

**By Cheque**  Payable to: Canadian Olympic Foundation

Please send completed form (and cheque, if applicable) to:

Selga Apse  
 Canadian Olympic Foundation  
 21 St. Clair Avenue E, Suite 900  
 Toronto, ON M4T 1L9  
 416-324-4297 or 888-377-7073  
 sapse@olympic.ca



## **PLANNING DOCUMENTS**

## STEP 1 - PLANNING GRID

| Desired;Outcome                   | Target;Groups      |           |                 |           |           |        |       |            |          |       |          |         |            |
|-----------------------------------|--------------------|-----------|-----------------|-----------|-----------|--------|-------|------------|----------|-------|----------|---------|------------|
|                                   | Prospective;Donors |           | Existing;Donors |           | Community |        |       | Volunteers |          | Board |          | Staff   |            |
|                                   | Individuals        | Corporate | Individuals     | Corporate | VIPs      | Alumni | Media | New        | Existing | New   | Existing | Program | Management |
| Raise;Money                       |                    |           |                 |           |           |        |       |            |          |       |          |         |            |
| Begin;Relationship                |                    |           |                 |           |           |        |       |            |          |       |          |         |            |
| Deepen;Commitment                 |                    |           |                 |           |           |        |       |            |          |       |          |         |            |
| Increase;Awareness                |                    |           |                 |           |           |        |       |            |          |       |          |         |            |
| Planning'Form'©'Denny'Young,'2008 |                    |           |                 |           |           |        |       |            |          |       |          |         |            |

## STEP 2 – OBJECTIVES

| Objectives-by-Target-Group        |             |             |             |                   |                   |                 |              |                  |                        |                        |                         |
|-----------------------------------|-------------|-------------|-------------|-------------------|-------------------|-----------------|--------------|------------------|------------------------|------------------------|-------------------------|
| Target                            | Objective-1 | Objective-2 | Objective-3 | Success-Measure-1 | Success-Measure-2 | Primary-Contact | Spokesperson | Supporting-Roles | Communication-Method-1 | Communication-Method-2 | Communications-Method-3 |
| Group-1                           |             |             |             |                   |                   |                 |              |                  |                        |                        |                         |
| Group-2                           |             |             |             |                   |                   |                 |              |                  |                        |                        |                         |
| Group-3                           |             |             |             |                   |                   |                 |              |                  |                        |                        |                         |
| Planning'Form'©'Denny'Young,'2008 |             |             |             |                   |                   |                 |              |                  |                        |                        |                         |



# STEP 3 – TASKS AND SCHEDULE

| Tasks by Group, Schedule, Person Responsible |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
|--|----------|---------|---------|--------------------|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Task   | Involves |         |         | Person Responsible | To be Completed By |        |        |        |        |        |        |        |        |         |
|  | Group 1  | Group 2 | Group 3 |                    | Week 1             | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 | Week 7 | Week 8 | Week 9 | Week 10 |
| Task 1                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 2                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 3                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 4                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 5                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 6                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 7                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 8                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 9                                       |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |
| Task 10                                      |          |         |         |                    |                    |        |        |        |        |        |        |        |        |         |

Planning Form © Denny Young, 2008

## STEP 4 - FINANCIAL

| Financial Objectives - Revenue and Expense |             |
|--|-------------|
| Date Created                               |             |
| Date Revised 1                             |             |
| Date Revised 2                             |             |
| Revenue Sources                            |             |
| Source 1                                   | \$ -        |
| Source 2                                   | \$ -        |
| Source 3                                   | \$ -        |
| Source 4                                   | \$ -        |
|  |             |
| <b>Total Revenue</b>                       | <b>\$ -</b> |
| Expense Items                              |             |
| Item 1                                     | \$ -        |
| Item 2                                     | \$ -        |
| Item 3                                     | \$ -        |
| Item 4                                     | \$ -        |
| Item 5                                     | \$ -        |
| Item 6                                     | \$ -        |
| Item 7                                     | \$ -        |
| Item 8                                     | \$ -        |
|  |             |
| <b>Total Expense</b>                       | <b>\$ -</b> |
| Result                                     |             |
| Total Revenue                              | \$ -        |
| Total Expense                              | \$ -        |
|  |             |
| <b>Net</b>                                 | <b>\$ -</b> |
|  |             |
|  |             |
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