

BNP Newsletter

Winter 2010



BNP
STRATEGIES

Philanthropic Management

Message from the President

The Holidays are synonymous with celebration and abundance. Following this period of generosity, why not continue to give of your time to people in need or to a charitable organization?



M^e Christian Bolduc, LL.B., CFRE
President and CEO

Increasing numbers of individuals are giving of their time by volunteering for the numerous organizations which regularly recruit volunteers for a host of different activities. Are you seeking to train or mobilize your organization's volunteers? Are you uncertain of how to go about it? You will find the answers to these questions along with a wealth of related information in our article entitled 'What if we were mistaken in soliciting the aid of volunteers?'

You will also wish to glance at the interesting and surprising statistics on giving and the cultural sector in Québec, and read the good news about our clients and their successes to date.

Enjoy!

What if we were mistaken in soliciting the aid of volunteers?

How many organizations and foundations complain about the scarcity of volunteers?

How many would like to see their volunteers doing more?

Volunteer squeeze

Is it really surprising that individuals recruited to sit on the board of directors of an organization or foundation turn out to be a mediocre vendors of benefit tickets or are little disposed to spur the development of a fundraising program about which they know essentially nothing?

Pressed into service to take action on a number of fronts, volunteers are often quick to lose interest and end up generating little in the way of tangible results. Then, in a last ditch squeeze designed to extract a final trickle of utility, they are invested with the task of recruiting their successors from among a pool of personal acquaintances.

In most instances, volunteer searches are conducted from within the networks of previously recruited volunteers. And why not? It is doubtless easier to recruit collaborators at one's level of influence, and easier yet to do so at a lesser level of influence. Thus the recruitment of volunteers from within the networks of existing volunteers is at best successful in sustaining current levels of influence.

This having been said, it is important to understand that both the level of volunteer influence and scope of volunteer networks have a determining impact on a foundation's performance or outcome of a charitable organization's fundraising campaign, as the case may be.

Wise Persons' Committee

To broaden volunteer recruiting horizons, a technique calling for the setup of a wise persons' committee has proven its worth time and again. What exactly does this technique entail, you ask?

Quite simply, it is a matter of gathering together a group of prominent individuals, instructing them to draw up a list of the wealthy, influential members of their community, and making certain that search efforts extend well beyond individuals who immediately come to mind and who are readily solicited by all manner of organizations. In essence, the idea is to invite 'people who know people' to lend you a hand. Only one meeting need be scheduled with a handful of 'people who know people', the aim being to draw up lists of well heeled, influential members of the community. It is then a question of sorting the names appearing on the list: Are these individuals generous? Are they entrepreneurial by nature? Are they well connected? Would they make good potential donors? Would they, in the capacity of donors, be capable of piloting a project or portion of a project?

Indeed, there is no better solicitor than a committed donor!

This technique can also operate in the plural. You may wish to convene several smaller groups of individuals with knowledge of a particular milieu or geographical sector, the object being to draw up a comprehensive inventory of possibilities.

Individuals to consider when setting up a Wise Persons' Committee include as follows:

- Politicians
- Political organizers
- Managers at the municipal level
- Directors of chambers of commerce/boards of trade
- Financial planners
- Insurance agents
- Members of social clubs
- etc.

Steering Committee

The task of the Wise Persons' Committee is to produce a single list of individuals. This list of names is then sorted based on the fundraising initiatives you are seeking to develop. You will therefore wish to strike a Steering Committee comprising a mix of board members and several of the more proactive members of the Wise Persons' Committee. The task of this committee will be to order the list and identify as follows:

- Potential donors for the following programs:
 - Major fundraising initiative
 - Major gifts
 - Endowment
 - Planned giving
- Potential leaders for the following programs:
 - Major campaign cabinet
 - Major gifts program
 - Endowment program
 - Planned giving program
 - Board member
 - Member of benefit organizing committee

A given person's name may appear on more than one list.

Putting the lists to work

Any action taken with respect to a potential donor or potential leader must be supported by a convincing case statement.

Are there any individuals—whose names appear on your list—who would be interested in providing support for an undetermined period of time given the readily perceived merit of your cause? The answer is a probable 'Yes', but they are likely to be few and far between. Are there any individuals who would be interested in helping make one of your key projects a reality? The answer is 'Yes', and they are likely more numerous to wish to take tangible action within the framework of a well defined mandate and clearly established timeframe.

The scope of the challenges which lie before you and the quality of the solutions that you are proposing together represent the two most important factors underpinning your power of persuasion. The document detailing these challenges and solutions is called a case statement. It is essential, whether for recruiting or solicitation purposes, that your case statement be well presented, and that the 'what', 'why', 'how' and 'how much' factors be clearly spelled out. It is equally important to train people so that they are properly poised to convey case statement substance when the time comes to initiate the recruiting and solicitation phase.

Creating and consolidating ties

As a result of the combined efforts of your Wise Persons' Committee and Steering Committee, you will find yourself in possession of a list of individuals who, for the most part, fall outside the confines of your networks of influence. What, then, do you do next?

The answer is simple. You have to set about presenting and explaining your cause and its inherent challenges, and then proposing solutions which your foundation or organization could adopt with a view to rising to the challenges at hand. You will readily sense whether or not the individuals you meet are receptive to your cause and amenable to making a contribution in one manner or another.

During a subsequent round of meetings, you will solicit and encourage the more receptive individuals to commit as donors or leaders for one of your programs.

What if we were to seek out entrepreneurs instead?

Volunteers, as exceptionally dedicated and flexible as they might be, are perhaps not as essential to your growth as you might think. Entrepreneurs capable of investing important sums of money or who would assume responsibility for a mandate with a well defined timeframe may be better poised to drive your programs. Indeed, it is important to recognize that the number of causes has increased considerably over the years and that they are all worthy. Influential individuals, certainly those who are especially well known, are solicited from all sides which makes it increasingly difficult for them to accept commitments ongoing over time.

As essential as citizen and community contributions are, the number of organizations competing for their generosity continues to increase. Highly successful fundraising is first and foremost an exercise in human relations and must be aimed specifically at influential individuals capable of making substantial donations.

The ever growing number of causes combined with the over-solicitation of well known community personalities is obligating us to stray from the beaten path and seek out individuals who, although wealthy and influential, tend to remain discreetly out of the limelight. This is when the setup of a Wise Persons' Committee can prove its worth... and then some!

By: Jacques Primeau

Good News at **BNP**

Clients making headlines

UQAC launches major fundraising campaign

On January 15th, Université du Québec à Chicoutimi (UQAC) and UQAC Foundation launched a second fundraising campaign chaired by Monique F. Leroux, President and Chief Executive Officer of Desjardins Group.



Based on the theme 'The Freedom to Look Beyond' (Libre de voir plus loin), the campaign—being run from 2008 to 2013—aims to collect a total of \$15 million. With \$14.9 million having been raised to date, the Foundation has revised the campaign objective upwards to \$18 million. Congratulations to the entire team at UQAC and AFQAC for this promising campaign kick-off!

Sept-Îles Regional Hospital Centre Foundation adopts strategic plan



Following the staging of four major fundraising campaigns which enabled organizers to raise \$5.7 million, the Foundation has adopted a strategic plan for the period extending from 2010 to 2014. The object of this plan is to adapt the mission of the Foundation to the requisites of the new Sept-Îles Health and Social Services Centre (CSSS), to enhance program organization, and to increase annual contributions made to CSSS. The plan aims in particular to develop donor acquisition and renewal programs, to render benefit events more profitable, and to institute a major gifts program as well as an endowment and

planned giving program. An entirely new approach based on the Wise Persons' Committee technique was adopted to provide for the recruiting of a fresh lot of volunteers and identifying of key prospective donors. The Foundation also seeks to triple annual contributions to Sept-Îles Health and Social Services Centre.

Collège Mérici launches major fundraising campaign

On January 25th, Collège Mérici Foundation launched a major fundraising campaign in the company of Québec Mayor Régis Labeaume and Campaign Chairperson P Michel Bouchard. Organized around the theme 'A History of Learning', the object of the campaign is to raise \$1 million. Of this amount, \$900 000 will be earmarked for the Information Crossroads and \$100 000 for the Foundation's endowment fund. Although the campaign has only just begun, an amount of \$586 221 has already been collected! Our heartiest congratulations to the team for this successful campaign kick-off.



Maison de la Famille des Maskoutains receives government financial assistance

Upon inauguration of the new facility on November 9th, Minister Nicole Ménard and Senator Andrée Champagne announced combined provincial and federal government assistance in the amount of \$675 188. This amount is over and above the \$755 517 raised during the major fundraising campaign. Maison de la Famille is an organization which supports families in the Saint Hyacinthe area. Given an ever expanding client base, there was a dire need for additional space. The new, much larger facility will make it possible to better address the needs of the local community.



Leukodystrophies Foundation on road to success

The Leukodystrophies Foundation focuses primarily on research designed to provide hope for children suffering from this grave degenerative disease. In December 2008, the Foundation launched a major fundraising campaign based on the theme 'Hope is life!'. To date, an amount of \$303 000 out of a projected total of \$450 000 has been collected. Founded by a couple whose child suffers from this disease, the Foundation—which operates without employees—relies entirely upon the dedication of a large number of volunteers. Having successfully reached two thirds of its stated goal in such little time is no mean feat for this organization. BNP is proud to invest on a volunteer basis in this cause which is dear to our hearts. Congratulations to the entire team... and keep up the great work!



Cégep de La Pocatière Foundation

Objective: **\$1 150 000** Outcome: **\$1 150 000**

Cégep de La Pocatière each year admits over 2000 students into regular stream and continuing education programs. The Cégep Foundation, which came into being in 1988, supports a scholarship



program, contributes to academic success and renders various projects possible. Since its setup, the Foundation has funnelled over three quarters of a million dollars into all manner of scholarships. The major fundraising campaign will make possible the setup of a sustainability fund which will serve to fund the various scholarships and support student initiatives. Congratulations to the entire team on this successful campaign!

Cégep de Sherbrooke Foundation

Objective: **\$2 000 000** Outcome: **\$2 503 750 \$**

On November 30th, Cégep de Sherbrooke Foundation closed its major fundraising campaign. Based on the theme 'Committing to our future' (S'investir pour la relève), the campaign surpassed



its objective owing to the high number of donors. Cégep de Sherbrooke each year welcomes over 6500 students from across Québec. Monies raised during the campaign will serve to assist students experiencing financial difficulty, to improve services provided students with special needs, and to fund trainee programs abroad. Congratulations to Danielle Gauthier, Chairperson of the Campaign Cabinet, Louise Lemay, Director of the Foundation, and François Coutu, Chairperson of the Foundation for this outstanding success!



BNP
ACADEMY

Eager to learn **EVERYTHING** you need to know about successful fundraising?

BNP Academy can help you do just that!

If you were unable to attend our training session in Montréal last October, you will want to consider one or other of two upcoming sessions. Our facilitators will be in Québec from April 28th to 30th.

Topics to be presented: The Power of Graduate and Alumni Network Development; Short Term vs Medium and Long Term Funding.

For further details, visit our website at www.bnpstrategies.com or contact Paul Viger at 514 528-8566.



Charitable donations rose by 24% in Québec

It is Québec which experienced the most substantial rise in charitable donations in Canada. Between 2004 and 2007, the value of charitable donations climbed 24% to \$1.7 billion, which compares with \$12 billion for the country as a whole in 2007.

In Québec, family fortunes, thriving businesses and foundations continue to increase in number. In 2007, the province was home to a total of 1807 foundations, an increase of 11% over the corresponding figure for 2004.

*Statistics gleaned from L'Actualité, edition of 15 October 2009

Québec's cultural sector rapidly expanding

According to a study on the economic impact and private funding of culture conducted by the Board of Trade of Metropolitan Montréal:

Montréal's cultural sector is valued at more than Québec's entire construction industry. This sector is in full expansion mode and accounts for close to 100 000 direct jobs.

"The sector is vulnerable," admits Michel Leblanc, "And is only 21% funded by the private sector, a figure which could surely be increased."

Simon Brault, President of Culture Montréal and chairperson of the committee set up to report on Rendezvous 2007: Montréal, Cultural Metropolis, believes that private sector participation in culture must be sustained, creative, enlightened and ever increasing. "It is unthinkable," he states, "That Montréal can take its place among the leading cultural cities of the

world without enhanced investment on behalf of the private sector.”

*Excerpted and adapted into English from Cyberpresse, 22 November 2009

The Carmelle and Rémi Marcoux Chair in Arts Management of HEC Montréal and Community-University Research Alliance (CURA) on the social economy conducted a study on the impact of the financial crisis on Québec’s cultural sector.

Study findings pointed up that private organization revenues (foundation, sponsorship and donor revenues) were likely to be the most affected by the financial crisis. In the performing arts sector, stakeholders were anxious given an anticipated 33% drop in private and own-source revenues. According to the Chair’s Director of Business Development, André Courchesne, cash sponsorship revenues have been the hardest hit.

*Source: Radio-Canada website, 17 November 2009

Solicitation of donations from parents of users aged 14 years or younger

The Health and Social Services Act now authorizes health and social services establishments to use the name and address of the mother or father of users aged 14 years or younger. AFESAQ officials had been pressing for the Act to be amended since 2006.

Congratulations



Congratulations to Gabriel Huot, our Director of Research, who was chosen by Community Foundation of Greater Québec to moderate a conference aimed at young philanthropists of the Franco-Albertan Foundation. The conference is scheduled to take place in May in Edmonton.



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