

WORKSHOP SELECTIONS

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The training I provide focuses primarily on **Board Development, Fundraising and Marketing**. The following list outlines formal presentations I have made over the past three years. However, this summary **does not include facilitating numerous board workshops** – both full-day annual retreats and evening meetings. In these sessions I helped groups identify needs, determine their priorities, plan strategically and initiate action steps for implementation. Please contact me at (705) 799-0636 or “elderstone@sympatico.ca” if you would like a workshop tailored specifically to your agency.

BOARD DEVELOPMENT:

EVALUATING YOUR BOARD’S PERFORMANCE

(Full Day)

“Mirror, mirror, on the wall” According to recommendations made by the Broadbent Panel on Accountability toward a Good Practice Guide for Governance, the board should concern themselves with 8 key tasks. One of those tasks is “Assessment and Control Systems” and includes regular evaluation of the board’s performance collectively. Before you can measure the success of anything you must first state your goals in measurable terms. This one day workshop will help board and staff leaders discover the steps necessary for an effective and positive evaluation.

THE ROLE OF THE BOARD IN FUNDRAISING

(Half Day)

Many conscientious volunteers join boards without completely understanding their role. Organizations are beginning to remedy that problem through orientation, job descriptions and terms of reference. However, many board members still don’t understand what part they should play in fundraising.

This session will look at the role of the board and the vital part they play as the organization’s leaders and stewards, particularly when agencies are going to the public for funds. The board's responsibility for charting the agency's future, setting priorities, determining the fundraising needs and then demonstrating their commitment through their donations, all affect the overall fundraising outcome.

A 10 STEP CHECKLIST TO BETTER BOARD RECRUITMENT

(1.5 Hours)

Considering that trustees of charitable organizations are accountable to the public – an increasingly important role given the recommendations of the Broadbent Panel and the Voluntary Sector Roundtables – how can we, as staff, help assure that our agencies have a strong leadership? Can we influence decisions around board recruitment? Come to this meeting prepared to discuss what’s hot and what’s not in recruiting new members to your board.

FUNDRAISING:

'TIL DEATH DO US PART

(Full Day)

This practical workshop will examine the importance of relationship building with your donors. Discover how to attract supporters to your agency and, more importantly, how to keep them! We'll explore strategies for effective donor recruitment and the all important "care and feeding" of current and potential donors. Learn the basics of planned giving and strengthen the commitment between your organization and those who support its mission.

DIRECT MAIL

(Full Day)

In this full day workshop, we'll explore the ins and outs of a direct mail campaign. Learn about why your agency would choose this as a fundraising method, what to expect, sources of funding lists, advantages and disadvantages and how to plan effectively. When is the best time to send out letters? Discover key elements and tips in this practical exchange of ideas.

PROPOSAL WRITING – TO THE RIGHT PROSPECT

(Half Day)

Good proposal writing is a challenge fundraisers face daily. It requires organizing data into an effective communication tool. What should and shouldn't be included in a fundraising proposal? Share ideas on this interactive day and learn practical tips on how to improve your proposal writing techniques.

This workshop is not limited just to proposals. To be effective, you must understand how to research prospective donors, improve your writing and presentation skills and cultivate a relationship with prospects and supporters. You will receive a comprehensive handout complete with "Advice from Funders".

DEVELOPING FUNDRAISING POLICIES

(Half Day)

Acquiring a major gift for your charity is an exciting experience. But what would you do if the donation came with unacceptable strings attached? We will explore why policies in fundraising are needed, what types there are, who should write them and who will be affected by them. Finally, we will finish with a group discussion of your experience and concerns around this issue.

FUNDRAISING, CONTINUED

ETHICS IN FUNDRAISING

(Half Day)

You have just had a visit from someone who would like to make a *major* gift to your agency. You struggle hard to raise funds so this opportunity seems very fortuitous, particularly considering shrinking government support. The only problem is, your prospective donor is a convicted felon - what do you do?

In this introductory ½ day workshop we'll explore ethical issues that arise in, what could be, the seductive game of fundraising. Learn what to watch for and take steps to avoid being lured down the wrong path. Participants should include board and staff who are currently raising funds in the agency.

SPECIAL EVENTS - BEYOND THE BAKE SALE!

(Half Day)

Special events are labour intensive! Explore their role in your overall fundraising strategy. Protect your staff and volunteers from burn-out. Discover practical tips to increase revenue and raise awareness.

FUNDRAISING 101 - HOW TO ASK

(Joint Session - Half Day)

Have you ever wondered what seasoned fundraisers actually say when they request a gift? Do you know how to really listen to your donor? During this interactive session you will learn how to ask for a big gift for your organization. Sit back and watch Cynthia and Scott as they act out a couple of scenarios for you - or join in for some practice. Conquer your fear of asking and learn why face-to-face is the most effective fundraising method.

A CASE IN POINT

(1.5 Hours)

Your fundraising case should flow naturally from the organization's mission. What information must you gather before you can effectively write the story? Crafting the words to make your case informative yet compelling is a challenge we all face. Join us for this quick, practical look at "A Case in Point".

TEA FOR TWO: BUILDING RELATIONSHIPS

(1.5 Hours)

Strong relationships are essential to a solid fundraising program. In this session we will examine with whom you establish those relationships, what barriers you are currently facing and determine strategies to overcome those barriers. We'll explore factors in organizational culture, leadership, volunteer management and marketing to make new connections and solidify existing partnerships.

MARKETING:

STRATEGIC MARKETING

(Full Day)

In this session we will determine why marketing is important. In small groups you will explore what tactics work best and report back to the group as a whole. We'll follow-up with basic marketing essentials from the "mix" to the "exchange". Receive a list of practical questions to ask, both inside and outside your agency, when developing your marketing plan. Understand what motivates people to volunteer, donate or buy your product. Explore how you can define your services in terms of benefits and find out why good customer service is essential. A bonus in your handout will include design tips for your publications.

PROMOTING YOUR AGENCY WITH PIZAZZ!

(Full Day)

Improve your fundraising letters, brochures and newsletters! In this hands-on, full day session you will learn to be a better wordsmith and discover useful tips in graphic design. Our morning will focus on theory and in the afternoon, you'll have an opportunity to analyse your own publications and determine how to improve them. *Be sure to come prepared with sample material from your agency*, roll up your sleeves and discover how to grab people's attention.

CREATING A WINNING IMAGE FOR YOUR CENTRE

(2 Hours)

In this 2-hour workshop you will acquire tools to help market your programs more effectively and ultimately benefit your centre. Learn what questions you need to ask *before* you create your promotional material. Discover design tips that will make your calendars and event promotion stand out. Share ideas and experiences!