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Cultural Resource Management Program

WORKSHOP: Raising Money for Your Cultural Organization
DATES: December 1-3, 2016
INSTRUCTOR: Judy Oberlander, Judy Oberlander and Associates Inc.
LOCATION: Room 108, Fine Arts Building, University of Victoria

Overview

This three-day intensive course will increase your capacity to raise money using a variety of strategies and tools. How you share your organization's story in a compelling way—both online and offline—is an integral part of raising money. We will discuss how links to an organization's mission, leadership, governance, marketing and communications all impact fund development. Over the three days, we shall explore ways to engage your board, staff, community champions, sponsors and members in widening the circle of support for your cultural organization. Lectures, case studies and interactive group discussions will be woven together to encourage participants from both large and small institutions to share their own experiences in the vital work of fund development.

Audience

This course will be of special interest to staff and board members of all sizes of cultural organizations including museums, art galleries, historic sites, performing arts facilities, festivals, heritage conservation organizations, historical societies and municipal governments.

The objectives for this course are to:

- recognize the importance of raising funds within strategic missions of museums, arts, culture and heritage organizations;
- provide strategies and tools for fundraising activities;
- identify links between fundraising, marketing, communications and programs
- strategically select the components for a plan to raise funds
- engage staff, board members, volunteers, donors and members to create a culture of philanthropy in order for organizations to thrive
- assess and evaluate selected fundraising strategies

Raising Money for Your Cultural Organization Outline

Thursday, December 1, 2016

9:00 – 10:30	Welcome + Introductions of all participants <ul style="list-style-type: none"> • What role does fund development play in your organizations today? • What role will fund development play in the next five years?
10:30 – 10:45	BREAK
10:45 – 12:00	Fundraising 101: A Short Overview + Terminology <ul style="list-style-type: none"> • Is raising money in the arts, culture, heritage and museum world different than other sectors? Trends today and tomorrow • Fundraising ethics: A conversation in small groups
12:00 – 1:00	LUNCH
1:00 – 2:30	The Big Picture of Fundraising for Your Organization <ul style="list-style-type: none"> • What are your sources of income? • For what are you raising money? • The importance of the gift cycle • A selection of fundraising tools
2:30 – 2:45	BREAK
2:45 – 4:30	Creating a Culture of Philanthropy in Your Organization <ul style="list-style-type: none"> • Connecting with your vision, mission and values • Creating an organizational fundraising strategy: An exercise with an opportunity to reflect on your organization
4:30 – 6:00	Optional social gathering at the University Club

Friday, December 2, 2016

9:00 – 10:30	Creating a Fundraising Plan: What is Your Strategy? <ul style="list-style-type: none"> • Where does fundraising fit into your organization's strategic plan? • Who is at your table today? And who will be there tomorrow?
10:30 – 10:45	BREAK
10:45 – 12:00	Links Between Fundraising, Marketing + Communications and Programs <ul style="list-style-type: none"> • What messages are you communicating? • Who are you reaching? Who would you like to reach? • Assessing your key messages and communication channels
12:00 – 1:00	LUNCH
1:00 – 2:30	The Case for Support: Sharing Your Story The Case Simplified – An Individual Exercise + Group Debrief
2:30 – 2:45	BREAK
2:45 – 4:30	Social Media and its Role in Fundraising Creating Your Organization's Fundraising Strategy <ul style="list-style-type: none"> • An exercise as a board member, staff member and/or volunteer • Short presentations to the group

Saturday, December 3, 2016

9:00 – 10:30	Engaging Boards, Staff and Volunteers in Fundraising <ul style="list-style-type: none"> • Roles and responsibilities to ensure financial resources • Strategies to engage the board and community leaders
10:30 – 10:45	BREAK
10:45 – 12:00	Donor Cultivation + Solicitation + Stewardship What type of donors do you have now? And in the future? What motivates your donors? Why do they support your organization? Donor prospecting – Who Do You Know? A Short Exercise
12:00 – 1:00	LUNCH
1:00 – 2:30	Setting Your Organization Up for Success: Human, Financial and Technological Resources <ul style="list-style-type: none"> • Developing a fundraising strategy • Scanning the field: What are the trends? • Investing in fund development for the long term: What is your ROI? • Clarifying roles and responsibilities: board, staff and volunteers • Timing: selecting the right fund development tools at the right time • Taking stock: Continuous evaluations of all your fundraising activities
2:30 – 2:45	BREAK
2:45 – 4:30	Developing Your Current and Future Fund Development Team <ul style="list-style-type: none"> • Building a culture of philanthropy within your organization • What are your fundraising priorities: next week, next month, next year • Future resources: publications, websites, webinars Concluding Discussions Workshop evaluations

Judy Oberlander is a Vancouver-based consultant (Judy Oberlander and Associates Inc.) who designs fund development programs and customized professional development workshops for boards and staff members of non-profit and charitable organizations, museums and foundations. Her passion is to help community-based organizations thrive. She combines insights from her service on a wide variety of non-profit boards with her heritage conservation, continuing education and cultural planning work across Canada in the public, private and non-profit sectors over the past 30 years. In addition to her Masters in Historic Preservation from Columbia University, she has a Certificate in Non-Profit Board Education from BoardSource and a Certificate in Fundraising from New York University. She enjoys bringing theory and practice together and has taught ten courses in the UVic Cultural Resource Management Program in heritage conservation planning and fund development. She has offered workshops in fundraising strategies and board governance for the National Trust for Canada and heritage conservation and urban vitalization for Simon Fraser University and the Vancouver Heritage Foundation.

For more information: crmcoord@uvic.ca

How to register: <https://www.uvcs.uvic.ca/Section/Raising-Money-for-Your-Cultural-Organization/CMCR255-2016F-C01/51963/>