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# Fund Development Resource Guide

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## Introduction to the Fund Development Resource Guide

This is one of a series of resources created by Community Foundations of Canada (CFC) to support the work of our network of community foundations across the country. Similar to manuals on other topics, it is meant to provide information and ideas in a manner that reflects best practices, is adaptable, and useful. Consideration has been given to the fact that Foundations vary considerably in the mix of volunteers and staff that comprise their leadership.

In addition to sourcing materials from [the resource library](#) housed with CFC, we also encourage you to reach out to other Foundations and learn from their experience as well as to share your own across the network. We are privileged to work in a sector that is generous and supportive in shared desire to do the best job possible.

The chapters of this guide are organized to address specific components of Fund Development within a community foundation context. Each begins with an introductory overview and aims to breakdown the process of this work into its key components. A number of tools are included with the hope that they can be easily incorporated into your work either as they are or with minor tweaking. Some of these are identified and included in specific chapters.

This resource guide follows a four-part webinar series *Fund Development 101* that was offered by Community Foundations of Canada in the first half of 2021. The recordings of these sessions can be found here:

[Fund Development 100 Part 1](#)

[Fund Development 100 Part 2](#)

[Fund Development 100 Part 3](#)

[Fund Development 100 Part 4](#)

Each includes approximately 45 minutes of presentation and excellent slides that could support your Fund Development work.

The importance of creating a culture of fund development within each community foundation cannot be overemphasized. Every volunteer and staff member has a contribution to make in this area. Community foundations are in the privileged position of starting with the questions “What would you like to achieve through your charitable giving?” and “How can we be a resource to help you achieve this?” Community foundations link people, needs and resources with community benefit being the primary objective.

# Table of Contents

## Introduction to the Resource

### Chapter 1: Getting Started

Introduction – Fund Development within the community foundation Context  
Mission, Vision and Values – these underpin everything  
Your Foundation’s Unique Value Proposition – Your “Secret Sauce”

### Chapter 2: Building and Implementing a Fund Development Strategy

Introduction  
Mapping the Resources and Opportunities Upon Which to Build Your Strategy  
Assessing Your Map of Possibilities  
Figuring Out Where to Start  
“Mining” Your Donor Database  
Internal Processes and Data Tracking to Support Your Fund Development Work  
A Sample Fund Development Plan

### Chapter 3: Donor Relations, Stewardship and Engagement as Part of Fund Development

Introduction  
Definitions  
Summary of Activities Within Each  
Connecting Donor Relations, Stewardship and Engagement with Fund Development

### Chapter 4: The Role of Key Intermediaries and Champions in Fund Development

Introduction  
Who do we mean by “key intermediaries and champions”?  
Strategies for building relationships with Professional Advisors  
Past and Present Board Members  
Donors and Fundholders  
Partnering with Grantees to raise profile and support

### Chapter 5: Building your internal capacity – Fund Development is a team sport

Creating a culture of fund development  
Developing your team’s skills and confidence  
Ongoing Education  
Roles and Responsibilities

# Chapter One

## Getting Started

This chapter focuses on the core pieces that will act as the basis of your Fund Development strategy. It includes definitions of vision, mission and values; an introduction as to how Fund Development is approached by community foundations; and tools for helping you begin to identify and explore the broad range of fund development opportunities unique to your Foundation. If you have already completed these initial steps you may wish to move directly to chapter two which focuses on developing and implementing specific strategies within a Fund Development Plan or chapter three which explores how donor stewardship, relations and engagement activities are also key Fund Development strategies.

### Introduction

**Fund development (sometimes referred to as asset building), grant making and community leadership** are the three core tenets of community foundations' work. Sometimes referred to as “the three legs of the stool”, each is independently integral to the function and impact of a community foundation while at the same time connected and dependent on the other two legs for its strength. Historically, it was these “three legs” that differentiated community foundations from other charities and granting organizations such as the United Way. Today, in many communities we are not the only organizations that have endowments, offer donors the option of building a fund or play a leadership role in addressing key issues. Similarly, community foundations have expanded their fund development from endowment only to include an array of flow-through, emergency response and other giving options. However, the fact that community foundations undertake fund development, grant and are a source of community knowledge and leadership across ALL sectors (health, social sciences, education, arts, environment) results in our ability to play a unique role with significant impact.

Fund Development is one of the core functions of all community foundations, no matter your size, geographical location or human resource composition. All staff, board members and volunteers have a potential role to play, whether or not you have someone specifically designated in a Fund Development role. **Fund Development is different from the Fundraising** activities typically undertaken by other charities in three important ways. These are:

- Fund Development focuses on building long term relationships with donors, their advisors, and community organizations and is less driven by short term financial targets.
- Fund development for a Community Function is not just about raising dollars and growing our own endowment, it also focuses on being a catalyst for philanthropy in our communities, and connecting people to the causes and organizations where they want to make a difference.

- Historically, community foundations focused solely on endowments as the vehicle for community philanthropy. While this remains the hallmark of our organizations, increasingly we are offering donors a mix of giving and fund options in order to ensure our relevance to a broader range of donors and increase our ability to nimbly respond to diverse community needs such as have been evidenced throughout the pandemic.

Often new community foundation staff, board members and other volunteers come with passion and energy, but no direct experience in the community foundation world. It can be challenging and confusing to build an understanding of the difference between the fundraising activities of other charities and the approach taken by community foundations. As one CEO so aptly put it, “I’ve been in this role a year now and I’m just beginning to understand what it is we do”. An educational session that speaks directly to “what is a community foundation” for new volunteers, staff or board members can be helpful.

### **If you are just starting out on the path of Developing a Fund Development strategy**

If you are just starting out on the path of developing a Fund Development strategy, the following sections will hopefully be useful to you. Core pieces include:

- a review of **definitions of vision, mission and value statements**. These underpin all aspects of your organization’s activities, including asset development
- **How to describe the “secret sauce” of your community foundation** – how to identify what makes you unique and why the CF will be valuable and attractive for donors as a result. You can re-use this descriptor in many ways, for example, on your website, in printed materials about the Foundation, in talks and in your social media materials.
- **Completing a mapping exercise** to uncover the range of resources and opportunities that can be drawn on in creating your Fund Development strategy and, finally

For each of these you will find links to helpful tools, templates, CFC resources, and stories from other community foundations.

If after reading this introduction you think that this matches where you are at, please read on! If you think that you have these core components in place already and are now ready to start building a development strategy and implementation work plan, we suggest you skip to Chapter two.

## **Mission, Vision and Values**

Our vision, mission and values underpin the why, what and how we do what we do. They should inform all aspects of our work, including how we engage in fund development, steward our donors, and support philanthropy in our communities.

The following are helpful definitions of each:

### **Vision**

A one sentence statement describing the clear and inspirational long-term desired change resulting from an organization's work

### **Mission**

A mission statement informs both internal and external audiences what we do – our purpose or why. It will guide your strategic planning and decisions regarding priorities and activities, as well as serve to focus and motivate your team.

### **Values**

Your organization's values underpin *how* we get things done – an underlying set of values and principles that guide our actions. These will shape how we interact with donors and other stakeholders, how we communicate, partner and choose our roles. They should also be the framework upon which the internal culture of your organization is built.

Most often your Vision, Mission and Values are developed by the Board of Directors with input from staff. Typically, they are reviewed regularly as part of a strategic planning process and shared publicly in a community foundation's communications. More information on this area can be found in CFC's resources on Governance.

As you develop your Fund Development strategy, always refer back to your Vision, Mission and Values statements and ask the question: Do the goals and activities of this plan align with these?

## **Describing Your Foundation's Unique Value: Add Your "Secret Sauce"**

"If you've seen one community foundation, you've seen one community foundation" is a commonly heard phrase in our movement. While we share a common goal of strengthening our communities and engaging with donors, advisors and organizations to do this, each community foundation is different as is the community which they call home. As a result, we all seek to fulfill our missions in different ways.

A fun and engaging way to begin to articulate *your* "secret sauce" is to ask your staff, board, volunteers and donors what they see as special or unique about your community foundation. You will likely receive a range of replies, but it may include things such as:

*"We grant across all sectors – arts, health and social services, education, environment and recreation"*

*"We have a lot of knowledge about the greatest needs in our community"*

*“Contributing to the community foundation creates a sense of belonging – donors are joining with others to make a difference in their community”*

*“Establishing an endowment means my gift goes further – the impact carries on forever”*

*“We can invite a range of people and organizations to convene and talk about an issue or need and they will come – they see us as a trusted partner”*

*“The Foundation has helped me make some of my donation as a “flow through” gift – so I am able to get my donation out to the organizations that need it immediately”*

Have each person first identify 5-6 qualities that they believe describe the uniqueness and value of your community foundation. Together as a group, ask each person to share their thoughts and write these on a large board or poster sheets. Have people share a story or example of something that illustrates what they are describing. Next, identify together the top 4-5 features that people agree on. As you build your notes from the discussion, be sure and include the stories that illustrated how these qualities were demonstrated or experienced. At the conclusion, ask the group to look at what has been crafted and consider if anything is missing? Is there anything that surprises them? What excites them about this?

From this exercise one can craft a clear statement of your Foundation’s unique role and contribution to your community – your “value-add”. This is a powerful thing to be able to share with potential donors, professional advisors and other members of your community. This statement will be unique to you, but may include some of these descriptors:

*Our CF acts as a resource to people who want to make a difference in our community. Our knowledge of the community, relationships with organizations within all service sectors, and our expertise in grant-making combine to make us a trusted resource. Further, the Foundation’s strong history of growing and managing endowment funds as well as immediate granting ensures that your donations will create both a legacy as well as have immediate impact.*

A statement of this sort, combined with anecdotal stories of impact, will be an important and powerful tool in your Fund Development work.

**So – what next? Building Your Fund Development Strategy. Let’s move to the next chapter where we look at the process for building your plan.**

# Chapter Two

## Building and Implementing a Fund Development Strategy

This chapter focuses on mapping opportunities related to fund development, identifying priorities, then developing and implementing work plans to achieve them. Three specific types of strategies are looked at in more depth: (1) those that emerge from the mapping process; (2) opportunities identified by mining your donor base; and (3) an example of a strategy that builds on the community foundation's leadership role. Additional strategies are also identified in Chapter 3 which focuses on Donor Relations/Stewardship/Engagement and Chapter 4 which looks at Key Intermediaries such as Professional Advisors and local charities.

### Introduction

With foundational pieces such as a Vision/Mission/Values statement and an understanding of your “secret sauce”, the next step is to create a “map” of opportunities. This is an exercise where staff, board and volunteers will all have important input. Out of it will come a host of potential opportunities which you will assess, then from which you will identify priorities (where to start) and implement work plans for each. In this chapter we walk through this process, beginning with the mapping exercise.

### Mapping the Resources and Opportunities Upon Which to Build Your Fund Development Strategy

“Mapping” your resources and opportunities refers to a process where you brainstorm the wide variety of people, organizations, activities, and interests that you might potentially draw upon to shape and mobilize your strategy. The combination will be unique to your organization. It is an exercise that will generate ideas for use in the present, but also to store away for future attention. Mapping benefits from input from a mix of people with differing perspectives, so good for engaging volunteers, staff, board, community partners and even donors if you desire.

#### Here's a tool that may be useful.

Deciding where to focus and begin your Fund Development activities can feel overwhelming. One tool that can be helpful in identifying options is the completion of a “mapping” exercise. The template can be found on the next page. This exercise can be undertaken by your team of staff, board and volunteers or simply by yourself.

Using the template that follows:

1. Record your Mission, Values and “Secret Sauce” statement in the center
2. Beginning in any of the circles, brainstorm and document what resources and opportunities exist in each circle. Think about all your relationships – their interests, talents, networks, actions and so on. Think about your existing donors and fundholders specifically. What are their interests, history and potential to want to give further, networks and so forth. Add more circles if you need. Be creative.

3. Add as much detail as you can to this map. Then stand back and ask the questions:
  - a. Where are the top 5 opportunities from a fund development perspective? (ie low-hanging fruit)
  - b. Where are the longer-term, but important opportunities to engage prospective donors?
  - c. Are there “clusters” or groups with common characteristics that might be suitable for the same strategy?
  - d. Are there individuals or organizations who would be helpful allies/champions in our fund development work

## Building a Fund Development Plan



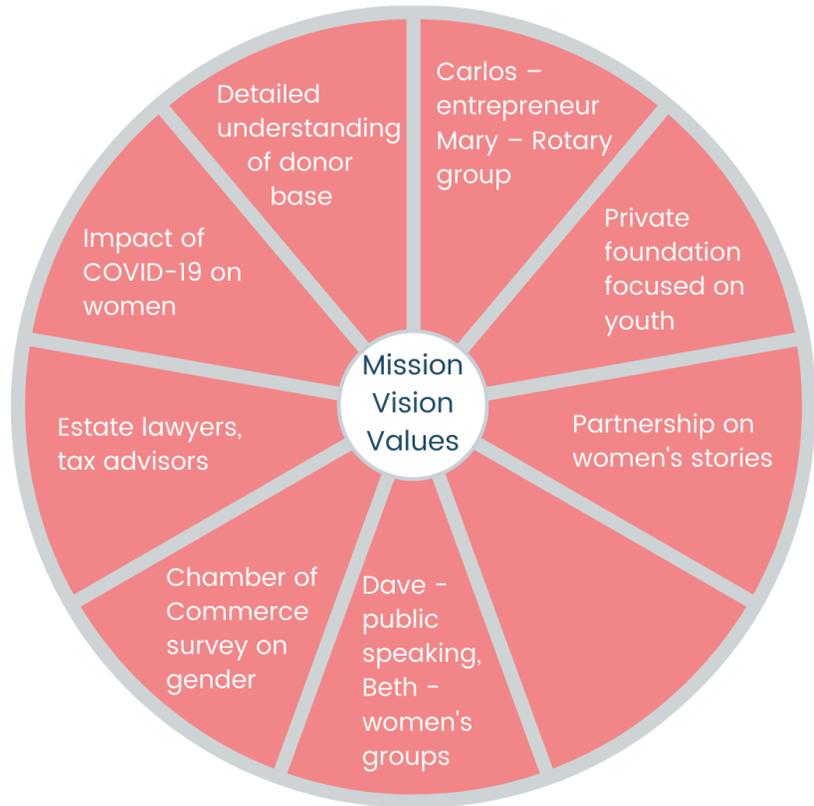
Mapping Resources and Opportunities



## Building a Fund Development Plan



Mapping Resources and Opportunities



### Assessing Your Map of Possibilities

Assessing, then choosing from, the range of possibilities you have identified is a critical step. Begin by listing the opportunities that “jump out at you” – some refer to these as the “low hanging fruit”. Referring to the sample map illustrated earlier, you might consider the following:

- You have had 21 new donors approach the Foundation in response to the emergency needs created by the pandemic. This creates an important and “ripe” opportunity to reach out to this group and relay how their donations have had an impact, share what you know about community needs, tell them more about the community foundation, and learn if you might be a resource to support their philanthropy through additional gifts or perhaps considering a fund.
- You have a board member who is a huge champion of the community foundation. Might you speak to him about helping to “open doors” for meetings or presentations to local estate lawyers? Perhaps his firm might host a community educational event about leaving a charitable gift in your will?
- You have 6 donors who have made an annual gift to the Foundation. Might you consider beginning a discussion with each about their interest in establishing a fund or adding a legacy gift to their will?

These are just some examples – your map will be unique to your Foundation. A tool that visually portrays some of the opportunities can be very helpful, however, in identifying priorities and first steps.

## Figuring Out Where To Start

A first look at the map you have created might yield an overwhelming number of possible areas of focus and action. When wearing your “fund development hat” it is not uncommon to feel overwhelmed by the number of options to choose from. Suggestions from board members, stories of others’ success, a new report from a fund-raising organization, a webinar you just saw and so many other examples all contribute to this huge mess of options before you.

### Things to consider:

Here are some key considerations as you contemplate and assess each:

- A strong fund development strategy for a community foundation needs to **balance short term benefits and long-term impact**. While tempting, be cautious of the lure to “follow the money”. In the Foundation world one example of this is the attraction of Donor Advised Funds – which many donors like – over the attraction of contributions to the Foundations discretionary funds.
- **Ensuring Your Plan Has Both “Roots” and “Wings”** - A primary objective of a Fund Development plan is to grow the permanent endowment from which grants will be made in-perpetuity. Endowments are the “roots” of community foundations. Attracting a mix of donors interested in a range of types of funds offered by the Foundation will be one of the central, long-term objectives of your fund development strategy. Establishing the strong roots provided by endowed funds requires a long-term view with a series of short term steps and strategies along the way.
- Continuously asking oneself the question: “Just because we can, should we?” is also helpful in this regard. For example, some Foundations have seen an increased interest in Flow Through/Pass Through gifts. These gifts have an impact no doubt, however reflect a shift in the business model that community foundations have been based on. While it may be easier to attract donors by acting as a conduit for seeing immediate impact by getting funds out the door, having too many of these funds in lieu of permanent endowed funds eventually limits and undermines the long-term impact and sustainability that a community foundation will have.
- A fund development strategy that results in a balance of short- and long-term impact is desirable, however. Identifying the strategies that will result in the quickest donations and require the least resources to implement is important. At the same time, ensuring your plan also includes strategies that build long term relationships, legacy gifts, new donor bases and so on.
- Think about customization and automation. At community foundations we tend to be very donor-centered in our work. This is natural given the long-term nature of the relationships we develop and our focus on being a resource to donors in achieving their philanthropic goals, not our organization’s goals. This often results in a very customized approach. The risk, of course, is that customization may not be sustainable as your donor and

prospective donor base grows. It is important, therefore, to consider up front whether there are ways to automate what you are doing while still creating a customized experience. This is where a good database can be helpful for creating scheduled activities such as mailings, for identifying those with common interests that might be engaged as a group (eg. Donors interested in food security, or from a specific geographic area, or who have all made a gift in their wills).

## **Using Your Mapping Exercise to Identify Strategies**

As you look at your map of opportunities and resources, what clusters and patterns do you see? Which things align best with your “secret sauce”? In the example that was used in the mapping exercise, for example, some of the following might emerge:

- You have a number of new donors as a result of covid. Some time has passed now since they made their donations so a priority strategy might be to determine how to convey back to them the impact of their donations, provide an update on the current needs in the community, and share further information about the Foundation. You will want to figure out a way to get to know these folks better and determine who might have interest in continuing to build a relationship with the Foundation. As you can see, this strategy will draw on whoever is involved in the granting and communications side of the Foundation’s work although it is a Fund Development strategy.
- A second strategy might build on a gap you perceive in the map. You notice that the Foundation has very few relationships with Professional Advisors. This is an important gap and merits attention early in your Fund Development work. You decide to focus first on developing a database of local estate lawyers.
- The private foundation that has a shared interest in youth at risk might be a potentially interesting partner in addressing the issue of youth aging out of the Children’s Aid Society. Would it be worth convening a meeting to explore this? Who else should be involved?
- Thinking about how you might use Dave’s public speaking strength to broader community awareness about the Foundation, key issues and so on is another possibility. Might a presentation to your Board member’s Rotary Club be a place to start?
- The fifth strategy focuses on your current donors and fund holders. You know that you have a base of committed folks who care about the community. Fleshing out or “mining” this donor base further will inform what strategies should be priorities in terms of further engaging with this group

It would be reasonable to develop your Fund Development Strategy focused on these five areas. Thinking further about each you will next identify specific activities (workplan), desired outcomes, timeframe, and who will work on each. Fund Development Plan structures and use will be discussed further in Chapter Four. Before moving forward, however, it is wise to circle back and consider the following: How do these fit with your vision, mission and values; do they reflect a balance of short and long-term focus, do they align well with our purpose and unique value-add in our community can be helpful now, before you proceed further. Getting “in principle” agreement from your board and the input of your staff would also be helpful.

## **“Mining” Your Donor Database**

Previously, we discussed taking a closer look at your donor base as a key piece of the mapping your resources and opportunities exercise. Spending the time up front to ensure that you have key information and that it is organized in a manner that supports your donor service, communication and development work is well worth it. In addition to increasing the effectiveness of your work, having well-organized and comprehensive information in your database makes a huge difference when your organization experiences staff changes. As with any database, it will be more effective if you think about how you want to use the information before you begin to build it. For example, you may find data useful for the following:

### **Donor Services:**

- Planning and tracking
- Accurate information as to who receives which reports, invitations, newsletters
- Interest areas
- Gift history

### **Development:**

- Planning and tracking contacts
- Accurate information related to communications
- Interest areas
- Potential focus for giving (eg. Donors who have made annual gifts and might be interested in establishing a fund; donors who have a fund who might be interested in a legacy gift; new emergency/pandemic donors who might want to continue donating or establish a fund etc)

For many community foundations, an early, basic but essential, step in their Fund Development work is to take the time and ensure that their database is up to date. Can you pull data on individuals with certain characteristics? Can you record your contacts and use this information to plan and organize your work? Can you pull lists from your database which will support your communications and engagement activities? Again, time spent up front will pay off. Also, the old adage “information out is only as good as information in” rings true. Many find, however, that as you work on building your database more opportunities related to Fund Development will become apparent.

**With your database up to date it is easier to identify “conversations that are waiting to be had” so to speak.**

For example:

- Fundholders and donors who might be interested in adding a gift in their will
- Regular donors who might consider establishing a fund
- Someone with a gift in their will who might want to make lifetime gifts
- Donors/Fundholders who might be interested in contributing to your discretionary fund in addition to their specific area of interest

- These donor relationships will take time to develop and one might see incremental steps along the way. For example, many people will start by making occasional or annual donations to the Foundation. As they garner more trust and understanding of what the Foundation does, they may be interested to invest more by establishing a fund providing grants to organizations they recommend (DAF) or in an area of interest to them (Field of Interest, Bursary/Scholarship, or Cause-focused fund). With this giving during their lifetime, they may then consider making a gift in their will – leaving a legacy. Watching for opportunities to initiate conversations to explore whether a donor is interested in expanding their commitment and giving is key. Often important discussions are initiated by a simple question such as “you have a deep commitment to youth through the grants you’ve made over the past several years to the xx organization. I wonder if you have ever considered leaving a gift in your will to continue this support into the future?”
- The world of philanthropy is evolving rapidly, however. Including strategies which have “wings” is important to help you remain relevant but also lead in this change. Consider, for example, how your Foundation might engage with younger people, with citizens from diverse cultural backgrounds, and with those who currently do not have the resources to establish a fund but want to contribute to their community. Fund Development strategies that have wings often intertwine with the granting and community leadership work of the Foundation. For example, hosting educational sessions related to key community issues can be seen as a leadership activity, however it is also an opportunity not only to profile the work being done by local agencies but also to spotlight how one can have an impact by giving to the Foundation.
- Community foundations and the philanthropic sector broadly is being challenged to re-think the roles they play, the relationship between funders and those on the ground closest to the issues, and how to be both nimble and creative in how we support our communities. An example of this is the recent shift to a *Trust-Based Model of Philanthropy*. [The Fact Sheet- Trust-Based Philanthropy](#) is a resource that describes this approach. Having “wings”, being flexible and responsive to different communities is critical as we create our role going forward.

## Internal Processes and Data Tracking to Support Your Fund Development Work

There are many systems and tools available to help track, measure and communicate fund development activities. Historically, many community foundations used a system called FIMS which was specifically designed for Foundations. Some still do, however many have moved to other systems such as Foundant and Raiser’s Edge. Reaching out to other Foundations can be extremely helpful if you are in the market to purchase a new system or experiencing challenges utilizing the one you have. Whether you have a sophisticated resource or a set of index cards upon which you keep your notes, having the right and accurate information at your fingertips can be immensely helpful.

To begin, ensure that you have a complete set of records for each of the following groups:

- **Donors:** their contact info, gift history, and privacy preferences

- **Fundholders:** their contact info, gift history, name(s) of fund advisors, grant history and privacy preferences
- **Professional Advisors:** local advisors divided by professional groups such as: estate lawyers, financial advisors, tax accountant, and estate trustees
- **Communication recipients:** who receives your Annual Report, invitations to events, media releases and so on

Setting up systems for recording your contacts with each of the individuals in this group, follow up plans and outcomes comes next. As well, creating processes whereby you can generate lists for communication perhaps, track data on the implementation of your plans and assess your impact are most helpful. Because Fund Development is closely connected to your other functions (Donor stewardship, community leadership and granting) you will need to consider what information is useful and needs to be easily drawn from those areas of your work as well. For example, being able to create a list of the donors or funds that have given to charities addressing Food Security will be helpful if you want to share an impact story in that area or perhaps invite donors to a relevant event, speaker or site visit that is taking place. All of these are excellent “touch points” for engaging with your donors or prospective donors.

### **A Sample Fund Development Plan**

Fund development plans are unique to each community foundation based on your needs, priorities and capacity. What follows is an example of a plan that might result from three opportunities identified in the preceding hypothetical mapping exercise. It is meant only as an example, and not a statement as to what your community foundation should focus on.

In this example, we select three priority areas for implementation. These are:

1. Reaching out to first time donors who contributed in response to community needs resulting from Covid-19;
2. Establishing and strengthening relationships with local estate lawyers who will be intermediaries with potential clients interested in including the community foundation in their will;
3. Playing a catalyst role related to high priority community need – youth at risk

For each we will identify short and longer-term objectives, key activities to be undertaken over the next year, who is responsible, timelines and review/evaluation plans. These will be summarized in a simple chart that can also be used for communication and planning purposes.

Some Foundations will decide to include more detail in their Fund Development Plan and some less. What is most important is that the format works for you and your organization. One can easily fall into the trap of spending a disproportionate amount of time in developing and describing the plan rather than doing the actual work. The plan should be a living document. By this we mean that it is part of everyone’s work plan, is updated and adapted as needed, and is useful in advancing the growth and relevance of your community foundation. A beautiful plan that sits on the shelf and is ignored is of little value.

**The sample plan follows on the next page.**

## Sample Fund Development Plan

Strategy	Activities	Timeframe	Responsibility
<p>1. There were 17 new donors giving to the CF in response to covid over the past 12 months. We want to create a strategy to further engage these prospects.</p>	<p>1a. ED/Senior volunteer to call each donor to thank them and learn more about why they chose the CF as well as their interests in the community</p> <p>1b. Based on these conversations, determine which:</p> <ul style="list-style-type: none"> <li>- May be interested in learning more about the impact of covid, ongoing community needs</li> <li>- May be interested in learning more about how the CF can be a resource for those interested in giving more</li> </ul> <p>1c. For those who appear interested in learning more and perhaps making additional donations to CF, develop an individual plan for contacts and conversations</p> <p>1d. Consider how your foundation could host a gathering to show appreciation, talk about the impact gifts have made, provide information on post covid context and community needs. Consider hosting at a community agency, engaging grantees to speak, having one of your board members thank people, sharing written information about community needs and your CF. Might there be a board member or fund holder who would host? Consider inviting other fund holders as well as board members.</p>	<p>Within next 2 months</p> <p>Within next 2 months</p> <p>Dev plans within 3 months. Implement 2 per quarter</p> <p>Within next 6 months</p>	<p>ED/ senior volunteer or board member Admin</p> <p>ED/Sen volunteer Grants staff if applicable</p> <p>ED, refer to event planning tool in Fund Development manual</p>
<p>2. Local estate lawyers are important referral sources to the CF. We want to strengthen</p>	<p>2a. Build our database with names and contact information on local estate lawyers and will trustees.</p> <p>2b. Identify those with whom we already have a relationship (eg. Board members, donors, have referred a client etc)</p>	<p>Completed in next 2 months</p> <p>Completed in next 2 months</p>	<p>ED and Admin/fin staff or volunteer</p>

<p>their knowledge of the CF and earn their trust.</p>	<p>2c. Identify top 5 individuals or firms to reach out to. Identify who is best to make the call. Call to see if we could have a call or coffee to discuss how the CF could be a resource to their clients.</p> <p>2d. Create a presentation (slide deck, information package) to distribute. Seek out examples from other CFs and CAGP</p> <p>2e. Identify local associations (eg estate planner, law association etc) at which you might be able to make a presentation. Reach out to see if this can be scheduled.</p>	<p>One meeting per month scheduled</p> <p>Within the next month</p> <p>Within next 3 months</p>	<p>ED, Admin/fin staff or volunteer</p>
<p>3. A significant issue in our town is that children who are aging out of care of the Children's Aid Society are experiencing poverty, unemployment, homelessness, and failing to continue their post secondary education. This concern has been identified by a number of agencies and is also the focus of a local private family foundation</p>	<p>3a. Invite a mix of concerned stakeholders to meet at the community foundation to discuss this need. Invitees might include:</p> <ul style="list-style-type: none"> <li>- Local children's aid society</li> <li>- Local community college/university if applicable</li> <li>- Youth-serving organizations</li> <li>- Board(s) of education</li> <li>- Representative from the private foundation with an interest in this area</li> <li>- Interested members of your board, potentially also donors/fundholders with an interest</li> </ul> <p>In a facilitated meeting, discuss the current situation, what strategies are in place to address the needs and how unmet needs could be addressed.</p> <p>3b. Building on what is learned, consider how the CF might present opportunities for funding to existing or prospective donors or potentially partner with the private foundation or other potential funders to support strategies to address these needs.</p>	<p>Try to convene meeting within next 2 months</p> <p>TBD depending on outcomes of meeting</p>	<p>ED and program staff (grants, admin)</p>

This is a simple Fund Development plan. Creating one that is useful for you given your resources and focus is key. Some people will include more strategies, a longer time horizon and multiple staff/volunteers. Others will want to add more targets and details as to how progress will be measured. There are numerous options – determining which best supports your work will be partly trial and error – just be sure that whatever approach you take is meaningful and reasonable. A Fund Development Plan that just sits on the shelf is obviously of little value.

# Chapter Three

## Donor Relations, Stewardship and Engagement as Fund Development

### Introduction

There is an old adage that says “your current customers are your best new customers”. This also holds true in our Fund Development work. Ensuring that we provide high quality, meaningful and engaging services to our current donors, fundholders, and community partners (including professional advisors and grantees) that create trust, accountability and transparency increases the likelihood of continued and deeper investment with the community foundation. We exist to be a resource to people who want to make a difference in their community. Ensuring that we offer appropriate and timely opportunities and respond to expressed interest are central to building long term relationships. This is different from a “sales”-mode approach and must be undertaken with genuine respect for a donor’s wishes.

In this chapter we look at Fund Development through the lens of Donor Relations, Stewardship and Engagement. While connected, each is a set of activities with a distinct purpose.

### Definitions

Donor relations, stewardship and engagement combine to ensure that our donors experience high quality interactions with the Foundation, that they are informed of how their gift is managed, that it is utilized for the intended purpose and with what impact. Some of these activities are transactional in nature and required by law. Others can be quite customized and varied depending on the capacity of your organization. It is important to have policies and systems in place to support this work.

For the purposes of this context, we are adopting the following definitions of Donor Relations, Stewardship and Engagement.

#### ***Donor Relations***

Donor relations are the more transactional activities that are undertaken to acknowledge and receipting gifts, recognize a donor’s generosity and report on gifts and impact.

#### ***Stewardship***

Stewardship activities are those we undertake for the purpose of “reporting back” on the impact of gifts, how we are fulfilling our mission and so forth. They can take a variety of forms and be simple or exhaustive depending on your capacity.

#### ***Engagement***

These activities form the basis of your commitment to building long term relationships with donors, community partners and champions. They are not necessarily tied to a specific gift but more typically contribute as part of the Foundation’s broader commitment to philanthropy.

## Summary of Activities Within Each

In the chart that follows you will see the range of activities considered part of each of the above and specific policies and procedures that support them. See [Key Governance and Administration Policies Template Guide for Canadian Community Foundations](#).

### Donor Relations, Stewardship and Engagement Charts

The Fact Sheet: [Regulatory Checklist - A Governance Risk Management Mitigant for Canadian community foundations](#) provides an excellent overview of key governance requirements in these areas.

### Donor Relations

<b>Gift acceptance and management</b>	Policies and procedures <ul style="list-style-type: none"> <li>● Types of gifts</li> <li>● <a href="#">Creating a Fund Agreement</a></li> <li>● Ensuring donor intentions match organization’s needs</li> <li>● Giving opportunities</li> <li>● Thresholds for endowment funds vs community funds</li> <li>● Tracking gifts and grants</li> </ul>
<b>Acknowledgement</b>	Expressions of gratitude <ul style="list-style-type: none"> <li>● Accurate</li> <li>● Timely</li> <li>● Meaningful</li> </ul> Gift receipting <ul style="list-style-type: none"> <li>● Compliance with Canada Revenue Agency Requirements</li> </ul>
<b>Donor Recognition</b>	Public form of donor acknowledgement <ul style="list-style-type: none"> <li>● Giving societies</li> <li>● Honour rolls</li> <li>● Donor walls</li> <li>● Donor profiles in publications</li> <li>● Donor events</li> <li>● Naming funds in annual reports and on your website</li> <li>● Donor stories – these have multiple purposes including recognition, public awareness, reporting impact and education</li> </ul>
<b>Reporting</b>	Demonstrate fiscal accountability <ul style="list-style-type: none"> <li>● Prudent investment</li> <li>● Spending to meet donor intentions and expectations</li> </ul> Convey ongoing appreciation Report on the impact of gifts and grants

## Stewardship of the Gift

<b>Fiscal Accountability for Investment of the Gift</b>	Investment Policy and Processes Investment Committee oversight Maintaining target revenue
<b>Spending in Accordance with Donor Intention and Expectation</b>	Terms of the agreement What to do when the purposes cannot be met
<b>Core retention of documents and Integrity of Data</b>	

## Stewardship of the Individual Donor

<b>For the Gift</b>	Honouring their intent Permanent Annual Legacy
<b>For the Relationship</b>	Communication preferences Impact reporting Engagement
<b>For the next Generation</b>	Family values Succession planning

## Stewardship of the Agency Donor

<b>For the Gift</b>	Permanent funds Connect them with Finance and Investment functions
<b>For the Relationship with the Agency</b>	Benefits of being part of the family of funds Building capacity – educational offerings
<b>For their relationships with their stakeholders</b>	Tell their story – blog posts, social media, publications

## Donor Relations and Stewardship Activities

There are numerous and varied types of activities that you can utilize as part of your donor relations and stewardship program. These include, for example:

- Thank you letters. Hand written notes can be particularly meaningful.
- Board thank you calls
- Check-in calls
- Marking milestone anniversaries
- Donor circles
- Legacy circles
- Story telling & reporting on impact
- Site visits

- Cause- or interest-based gatherings
- Regular e-news – stories of gifts, impact, accountability
- Networking and engagement activities – agency groups, younger generation cohort, giving circles

## **Connecting Donor Relations, Stewardship and Engagement To Fund Development**

[Listen HERE to the 30-minute segment](#) from the CFC’s Fund Development 101 Webinar (Part 3 of 4) on Donor Stewardship & Engagement (April 26, 2021). In it, Sara Neely, VP Philanthropy with Victoria Foundation walks through the components of Donor Relations, Stewardship and Engagement, outlining the policies and practices in each and how they contribute to building donor trust and confidence. As you gain your donor’s trust in your Foundation’s integrity, professionalism, and impact, they will continue to turn to you as their philanthropic resource.

In this webinar excerpt, Sara has described a number of strategies used by the Victoria Foundation, including:

- Communications
- Events
- Recognition
- Education

The mix of strategies you select will be determined by your unique context and capacity. In addition, a sample invitation and planning worksheet for an event follow. These can be adapted for planning events of various types and sizes.

[Invitation](#)

[Planning Guide](#)

## **Building Relationships Lies at the Heart**

At the heart of all of these activities, is the goal of building long term, trusting relationships. From this base you will be able to have conversations about how the community foundation can support the diverse charitable interests of donors, how you can build broader understanding of local issues and responses to these, and how you can build a Foundation that is an anchor institution in your community forever.

# Chapter Four

## Key Intermediaries

### Introduction

Including at least one or two strategies within your Fund Development Plan related to the development and engagement of key intermediaries can be immensely beneficial. Often the benefits are longer term in nature – it may be several years, for example, before you know how many estate gifts have resulted from a relationship that was built over decades. This is part of a balanced plan that was referred to earlier – developing a plan that has both short and longer-term strategies and supports a future for your Foundation that has both “roots and wings”.

### What Do We Mean By Key Intermediaries?

What do we mean by “intermediaries”? These are the people who are in a position to act as champions or ambassadors for your Foundation. They have relationships or networks of people who may be interested in becoming a donor. Consider, for example, the following:

- Estate lawyers and will trustees
- Financial planners
- Tax accountants
- Present and past board members
- Current donors and fundholders
- Your grantees
- Local leaders such as members of municipal government and Chamber of Commerce
- Media partners

### Strategies for Building Relationships

Building your relationship with these intermediaries, keeping them up to date on community needs and the Foundation’s work to address them, and learning more about how you can support their work are all important parts of a Fund Development strategy. This may be accomplished through individual contacts, corporate or group educational sessions, or including them in your general communications and event invitations.

### Professional Advisors

There are many excellent examples of strategies and resources for building relationships with professional advisors that have been developed by Foundations as well as other organizations such as the Canadian Association of Gift Planners and the Will Power initiative.

Just as with your donor base, building a comprehensive data bank of information about your local advisors, organized by type (estate lawyers, financial advisors, accountants etc) will support your communication, contacts and tracking activities. Likewise, developing strategies that address the

unique needs and interests of each group is important. For each sub-group of advisors, ask yourself:

- Does the advisor or firm have a pre-existing relationship with your Foundation – for example, as a board member, having previously referred a client? How might you connect and build on this?
- How could the CF add value to what they already provide to their clients?
- Do they have specific problems or “pain points” that the CF could help alleviate - for example, providing prepared charitable gift clauses that can be easily inserted into wills.
- What information do you have to share that might be of interest to the individual advisor or firm?
- Could this advisor or firm help open doors for you to other advisors – for example, invite you to speak at their local association meetings.

As you prepare to engage with professional advisors in your community, some of the resources you will need will be generic to all groups, however some will benefit from a more tailored focus.

Information sheets describing what a community foundation is and How We Can Work with Professional Advisors will have broad usefulness. Topics to include:

- What is a community foundation?
- How to Work With a community foundation
- Tools for Professional Advisors including Will Clause inserts
- Information on Types of Funds
- Information on Types of Gifts and the Benefits of Each
- Information Comparing Private Foundations and Donor Advised Funds

There are many potential strategies for engaging with your local advisors. As with all relationship building, the goal is to have ongoing, regular contacts that build trust and knowledge about the work of your Foundation and how you can be a resource. Below are some examples of potential contact types:

- An informal one on one coffee meeting to talk about the Foundation and learn more about the Professional Advisor’s practice and how philanthropy is part of his/her work with clients
- A “lunch and learn” presentation to a firm in which you talk about the impact of the Foundation, how it is a resource to donors and learn more about philanthropy within their work
- Co-hosting an educational event with a professional advisor or firm, perhaps focused on a topic such as the importance of having a will
- Hosting a CF event in the office of one of your local firms
- Writing a story for your annual report or other publications about one of your local advisor firms that has helped facilitate legacy gifts to the community

- Some Foundations create an advisory committee of professional advisors to help inform their work. This requires an investment of time and resources on the part of both the Foundation and Advisors, thus it is important to be clear on the objectives and “value-add” of this type of initiative.
- Professional Advisors who are members of your Board or with whom you have a relationship in the community may also be helpful allies in hosting gatherings for you. Some Foundations, for example, co-host public or donor educational evenings on topics such as wills or estate planning with their estate lawyer colleagues. Others might help create an opportunity for you to make a presentation to a professional group such as your local Estate Planners Council or Law Society. These are all important opportunities to broaden the reach of your Foundation. As you create your Fund Development strategy it is recommended that you include 1-2 actions focused on this group.

### **Past and Present Board Members**

Past and present board members are invaluable ambassadors for the community foundation. They are often very willing to share their passion about the Foundation, but may be uncertain or lack confidence about how to do this. In Chapter 6, Building Your Internal Capacity, you will find a Toolkit designed to help build the skill and confidence of your Board Members and other champions to speak about the Foundation and engage potential donors.

### **Donors and Fundholders**

Who better to tell others about the value of your community foundation than those who have chosen to use it as a resource for their philanthropy?

Sharing donor stories about how they have been able to make a difference in the areas they care about, their trust and confidence in the Foundation, and their commitment to the community is a powerful Fund Development strategy. This can be done in your publications, videos that are shared on your website and social media or in articles featured by local media. Selecting stories that resonate with a wide range of audiences and capture a variety of ways to engage with the Foundation is important.

Donors and Fundholders can also assist in profiling the community foundation throughout their networks. For example, if they are a member of a service club, professional group, or even book club they may be willing to arrange to have you come and speak about the Foundation and the impact donors can have in the community.

In addition, some donors and fundholders enjoy hosting gatherings in their homes where a mix of donors, fundholders and potential donors can meet each other and learn more about the Foundation in a relaxed and pleasant manner.

### **Partnering with Grantees**

Your grantees are also important intermediaries as they can speak first hand to the impact the community foundation is having and to the needs in your community as a result of your grants and leadership. One needs to be respectful of how much one is asking of an organization

(because it will be hard for an organization to say “no” to a request that comes from their funder), but exposing donors or prospective donors through site visits or educational opportunities provided by those closest to the issue can be very powerful. This strategy can be as simple as occasionally hosting a meeting of your board at a grantee organization and including an educational portion in the meeting. More time consuming, but very valuable, is creating opportunities for your donors/fundholders and prospective donors to learn directly from those providing services and those with lived experience. Donor education of this type must be provided in a manner that is respectful and builds appreciation for the complexity of issues experienced by people. It can, however, be very powerful and help to build deeper understanding. Some examples of such learning opportunities include:

- Hosting a tour at one of your grantee organizations followed by a talk or opportunity to meet with staff and clients of the organization afterwards.
- Arranging for a group of donors with a shared interest, for example in arts, to attend an exhibit or performance that was funded through a grant together, then perhaps share a coffee and discussion afterwards
- Host a gathering focused on a particular area, for example “cycling” and invite two or three grantees and community experts to do a presentation followed by time for mixing.

Each of these examples has multiple benefits as they provide an opportunity for people to learn about their community and the Foundation while engaging with others who are like-minded in their desire to support their community. They can be relatively low-cost to run and often volunteers can be enlisted to help with the organization.

### **Media Partners**

Many people think of advertising as the media's only role. Advertising options are often expensive and limited in number. Reimagining media as a “partner” in the work you do can generate a number of other possibilities.

For example, when Hamilton community foundation launched a multi-faceted strategy in 2005 to address poverty reduction, the local newspaper came on board as an active, long-term partner. The paper viewed itself as having a major public education role and for a number of years were leaders in presenting and analyzing data and stories regarding poverty and poverty reduction strategies in Hamilton. A senior staff member of the paper joined the board of the Foundation, which further deepened their understanding of the issues as well as the Foundation. Many public education events were hosted at the Hamilton Spectator auditorium and multiple editors became interested and actively engaged in the community’s work.

Some community foundations establish agreements to host regular columns, radio interviews and events jointly with their media partners, helping each to fulfill their community leadership roles.

# Chapter Five

## Building Your Internal Capacity

### Creating a Culture of Fund Development

The idea of having “Fund Development” responsibilities can sometimes feel out of the comfort zone of community foundation staff or volunteers who come from a more service-provision experience, feel uncomfortable “asking for money” or are reserved by nature. Some may view traditional fund raising as “pushy” or manipulative, and consider the development of a strategic and targeted strategy as distasteful.

In some situations the above may be true. Community foundations, however, are in a privileged position of starting with the questions: “What would you like to achieve through your charitable giving?” and “How can we be a resource to help you achieve this?”. Community foundations link people, needs and resources with community benefit being the primary objective.

It is important, therefore, that all staff and volunteers of the Foundation understand the role that the community foundation plays. Fund Development is not about “pitching” pre-determined funding opportunities to donors. Rather, it is about enabling donors to support the things in the community that align with their values and interests. Sometimes those will be quite specific and sometimes donors will value the unique opportunity to support their broader community that is provided by the community foundation.

All Foundation staff and volunteers contribute to the activities and success of the organization’s fund development. This is true because fund development at a community foundation relies on building:

- Trusted long term relationships
- Integrity in the way gifts are received, stewarded and granted
- Insight and inspiration as to the community’s needs and how these can be addressed

The Foundation’s leader, whether paid or volunteer, has an important role in setting the tone and standard for the organization’s culture. Creating opportunities to talk about each person’s contribution to the above and the value they add will, over time, ensure that fund development is integrated within all aspects of the Foundation’s work.

In addition, focused discussion, education and coaching about how to identify opportunities to advance fund development work will also further the development of active fund development. Each role will have a unique mix of these opportunities. The following are some examples:

- A donor calls to get a duplicate tax receipt as they have misplaced theirs. In the course of the conversation about this, they mention that they saw an ad on TV about making a gift in your will and wondered if the Foundation helps with that sort of thing.
- A member of your board is walking their dog and runs into a neighbour. They stop to chat and shortly into the conversation the neighbour says “by the way, I’ve been meaning to

ask you. You are on the board of the CF aren't you? I'm very concerned about homelessness in our city and I wondered if I can do anything about that through the CF?"

The possible examples are endless. What is important is that all of your team members, staff and volunteers, know to listen for these opportunities and how they can respond. It is not about having all the answers yourself, rather, it is about acknowledging the question and interest and offering to connect the person to whoever is the right CF team member to respond. "Could I have xx give you a call?", "You might be interested in seeing our latest report on that, could I have it sent to you?", "you know, I'm not really sure but let me find out for you".

### **Developing Your Team's Skills and Confidence**

Talking about these situations, possible responses and the importance of everyone's role in responding is key. To help with this, a sample educational session follows. Called "Taking it to the streets", the session was created for use with staff, board members or other volunteers. It supports building a culture and capacity for fund development by growing understanding, skills and confidence.

## **Taking It To The Streets – Developing skills and confidence in talking about the Foundation**

This tool has three parts which can be delivered separately as part of an educational session for staff, board or volunteers, or combined into one session. The three parts are:

1. Sharing stories of impact
2. The "CAKE" approach
3. Practice scenarios

Following is a brief description of each.

### **1. Sharing Stories of Impact**

Often staff and volunteers feel that they have to be able to recite all the facts and details about the community foundation if asked a question. Trying to remember the annual returns on investments, number and agencies receiving grants, annual donations, expense/admin ratios and so on is daunting and can result in a failure to say anything for fear of "getting it wrong" or perhaps, in fact, providing incomplete or inaccurate information to someone who inquires.

Instead, why not encourage staff and volunteers to share stories of what has inspired them about the Foundation – stories of grants that have changed lives, thoughtfulness of staff, the way the Foundation responded during the pandemic and so on. Everyone has at least one story to share. Allocating a portion of board or team meetings to share these stories can be very powerful and remind people of the important role the Foundation plays. Talking about how these can be publicly shared (while protecting confidential information) is valuable. For example, "At our board meeting last month we heard about

how the xx agency had helped women leaving abusive situations and it was made possible financially through a grant”. If the other person hearing this wants to learn more, a helpful follow up would then be something like “Can I give your name and number to the ED at the Foundation – she can give you much more information than I” or “we just published our annual report, could I have it sent to you so you can learn more about the Foundation?”.

A board or staff discussion of this sort can also include sharing other approaches that people of used to describe the Foundation, situations they find particularly challenging and discussion of how these might be approached.

## **2. The CAKE Approach**

CAKE provides an easy acronym to guide interactions with donors or the public. It is a helpful take away from other “Take It To The Street” discussions. [This can be used as a handout for an educational session.](#)

## **3. Practice Scenarios**

This exercise can be used as part of a regular board or staff meeting or as a stand-alone educational session.

Introduce the CAKE acronym and guidelines to the group first.

Next, divide the larger group into subgroups of two to four people and assign one of the following scenarios to each. The scenarios are:

- A.** You’ve popped into your local independent hardware store to pick up some supplies you need for a small repair project. As you are waiting in line at the cash register you notice that a number of plaques are hanging on the wall behind the owner who is cashing people out. They are certificates of appreciation for the support this store has provided to a variety of children’s literacy programs. You are familiar with some of these programs but not all of them. How might you start a conversation with the store owner about his philanthropy?
- B.** You are meeting with your lawyer to update your personal will. You have seen his name on the Foundation’s list of local professional advisors, but don’t believe he has had any relationship with the foundation to date. How might you start a conversation with him about the foundation, the role of advisors in inspiring charitable gifts and Will Power?
- C.** You run into a neighbour while out for a walk. Stopping to chat for a minute, she says to you, “I’ve been meaning to give you a call. I know you are on the Board of the foundation and I wondered how I could find out more about what I could do to help address our city’s homelessness problem.” How might you respond?

Each small group is then tasked with the following:

- Keeping CAKE in mind, how might you respond or initiate a conversation?
- Have you had similar experiences – what worked, what didn’t work?

- What stops you from saying anything in a scenario like this – together can you brainstorm what might make this easier

After returning to the large group as each sub-group to share what they discussed and learned.

## **Ongoing Education**

As with anything, education and professionalism is not a “one shot deal”. Ongoing opportunities to hear about and discuss new approaches and developing “best practices” are important. Some community foundations invite their agency partners to join in these sessions, for example participating in a webinar hosted by an organization such as Canadian Association of Gift Planners. This can reduce costs while providing an opportunity to both build relationships and learn together. Simply adding a “story sharing” item to each agenda can be powerful, for example asking each person at the table to share a story of the Foundation that has inspired them. This both builds the bank of stories that people have to draw upon when talking with potential donors but also provides an opportunity to practice talking about the Foundation and its impact. There are many educational opportunities offered through CFC and also available from partner organizations such as CAGP, AFP and others.

## **Roles and Responsibilities**

Across the country there are as many titles and descriptions for Fund Development staff as there are foundations. Some focus primarily on Donor Stewardship and Development, others Development, and yet others assume a broader Philanthropy focus. Similarly, role titles range from Director, VP, Manager, Specialist and Administration to name a few.

If you are in the position of developing a new role it may be helpful to seek out examples from other, similar-sized Foundations. Being clear as to the nature and scope of responsibilities you want to include in this role and how it will connect to other roles within your Foundation (eg. Donor services, communications) will be important. Consulting community foundations of Canada regarding any recent survey results related to salary ranges for different positions may also be helpful.

Many Foundations will not be in the financial position to have someone fully-dedicated to fund development. As a result, it is even more critical that everyone appreciates how they contribute to growing the assets of the Foundation – appreciating what donors value and look for, the role and impact of the Foundation in your community, and the value of philanthropy in creating the world we aspire to.

## Resources and Samples

Fact Sheet: [Making the “Ask” Fund Development](#)

[Key Governance and Administration Policies Template Guide for Canadian community foundations.](#)

Fact Sheet: [Regulatory Checklist - A Governance Risk Management Mitigant for Canadian community foundations](#)

**Visit [communityfoundations.ca/resource-library](https://communityfoundations.ca/resource-library) to find more tools and resources.**