



# RAISING FRIENDS & RESOURCES

Mark Holmgren, Tamarack Institute

[www.TamarackCommunity.ca](http://www.TamarackCommunity.ca)



- “The only road to sustainability is to engage the community in your work, to turn that community into an army of friends achieving something amazing together, spreading the roots of ownership of your mission and vision throughout the community, so the community would not dream of letting that mission die.”

• Hildy Gottlieb



## THINK PAIR SHARE

FIND SOMEONE YOU DO NOT KNOW.

INTRODUCE YOURSELVES AND

ANSWER THIS QUESTION:

**WHAT ARE THE CHARACTERISTICS OF A GOOD FRIEND?**

## WHAT WE VALUE IN FRIENDSHIP

- LOYALTY
- HONESTY
- DEPENDABILITY
- NON JUDGEMENTAL
- GOOD LISTENER
- AUTHENTIC
- DIVERSITY
- SIMILAR VALUES
- OPEN MINDED
- FUN
- HUMOUR
- SUPPORTIVE
- CARING
- ENGAGING

# FRIENDS IN ACTION

The power of relationships



## FRIEND-MAKING TAKES TIME. SO DOES FUNDRAISING.

### DONORS SAY

What do you want from me?

Why should I choose you?

How much do you want me to give?

Why is your cause important?



### FRIENDS SAY

How can I help?

When do you need me?

How much do we need?

Count me in.

## **FRIEND AND DONOR “PROCESS”**



- Making Friends
  - Keeping Friends
  - Re-connecting with forgotten friends
  - Learning from friendships that end.
- Donor Acquisition
  - Donor Retention
  - Donor Recapture
  - Donor Churn

## **WHAT DO FRIENDS DO TOGETHER?**

# TYPES OF FUNDRAISING

- DIRECT MAIL
- SPECIAL EVENTS
- ANNUAL GIVING
- MAJOR CAMPAIGN GIFTS
- PLANNED GIFTS (WILLS ETC.)

**NUMBER OF DONORS**

*Small/initial gifts*

*Events*

*Ongoing Donors*

*Campaigns*

*Planned Giving*

Bulk Mail  
Direct Mail  
Social Media  
Door to Door  
Street Fundraising  
Point of Sale

General Public  
Friends  
Races/Walkathons  
Contests  
Bike-a-thons, etc.

Operating asks  
Program-specific  
Faith Communities  
Employee Groups  
Labour, Business

Cause related  
Integrated Approaches  
Movement Building  
Deeper Involvements

Bequests  
Endowments  
Memorial Gifts

Trust

Size of Donation

Life Long Giver

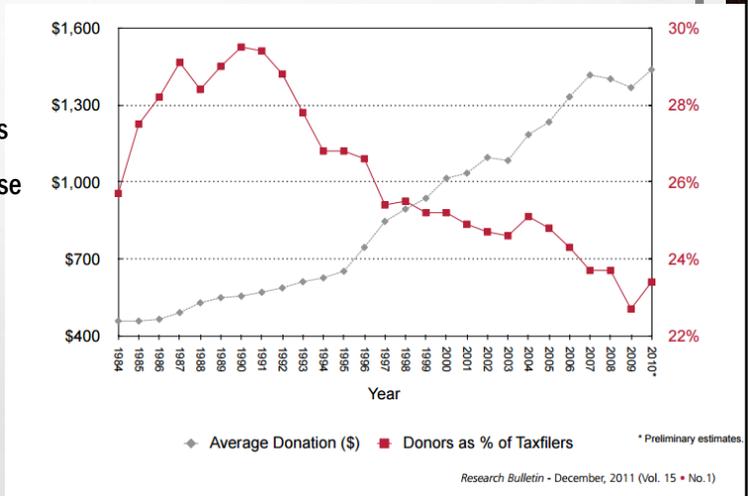
IMPACT AND SUSTAINABILITY

## FUNDRAISING CONTINUUM



# KEY TRENDS

- Collective Impact Investing
- Impact Investing – e.g. Social Impact Bonds
- Social Purpose Businesses/Social Enterprise
- Innovation Grants
- A Continued Disinterest in Core Funding
- The Dissipation of Boomer Giving
- Micro giving
- Donors funding government run services



## EXAMPLE 5 YEAR REVENUE MIX STRATEGY

FROM \$9 MILLION IN 2015

TO 13 MILLION IN 2020

OVERARCHING STRATEGY: GROW  
UNENCUMBERED MONEY.

Source	2015	2020
Provincial grants/contracts	57%	40%
Municipal	4%	4%
United Way	5%	5%
Social Enterprise	8%	8%
Major Foundations	2%	3%
Associations, small funders	2%	2%
Major Gifts	7%	10%
Campaign Donors	14%	20%
Direct Mail/Social Media	1%	8%
TOTAL	100%	100%
Planned Giving	\$120,000	\$250,000

## PRECONDITIONS OF SUCCESS

A track record of excellence

A compelling vision and case for support

A campaign plan

Visible, active leadership involvement

Understanding Prospects – who cares about what you do?

Cultivation – “the engagement process”

Solicitation – knowing when and how to ask for how much

Stewardship – keeping our friends through ongoing recognition and personal interaction

The number one precondition of success is....

Your belief in what you are proposing shining throughout your case or proposal.

# KEY QUESTIONS FOR CASE DEVELOPMENT

## WHAT DONORS AND FUNDERS WANT ANSWERS TO...

- Are you doing important work that connects to what we want to invest money in? What about you stands out, why should you be the choice I make to invest in?
- Are you well-managed, governed well? Are you able to articulate a sustainable future for your work and what you want me to fund?
- How will my support/investment create positive and demonstrable change? How will you keep me informed about this? Are there other ways besides money for me to be involved?
- Will involvement with you be a satisfying experience? Will you help me meet my philanthropic aspirations? Is there partnership potential for us going forward?

Adapted from <http://hbswk.hbs.edu/item/four-questions-fundraisers-must-be-prepared-to-answer>

**BE SO GOOD  
THEY CAN'T  
IGNORE YOU**

~STEVE MARTIN

## BEST ADVICE

- Involve donors/funders very early
- Ensure you include them in your top 100 champions
- Engage! (Like you would want to be engaged)
- Communicate (as you would a partner)
- Donors bring ideas, connections, and ultimately power.
- Use your credibility and your passion to include others
- Have your house in order.

# THE COMMUNITY BRIDGE STORY

## A FEW MORE TIPS

- Write well, with verve and with grammatical precision
- Write to style guide.
- Speak intentionally but be real, be yourself.
- Do not skip or sidestep a question a friend, donor or prospect asks
- Seek to know them as much as you want them to know you.
- Don't get political, don't preach ideology, don't complain.
- Speak the truth and say I don't know when you don't know.

Where the  
magic happens

Your  
comfort

## EXERCISE

- What compels you to donate your money?
- Think like a funder: what do they REALLY want?
- What are 2 or 3 Friendraising “strategies” you can bring home to implement?

# RESOURCES

- Friendraising (Paul Born): <http://vibrantcanada.ca/files/friendraising.Pdf>
- The Six P's of Successful Fundraising: <http://www.gcn.org/articles/The-Six-Ps-of-Successful-Friend-Raising>
- Tips on writing Proposals with Paul Born (video): <https://www.youtube.com/watch?v=faBOFSHk3fQ>
- Why Friend-Raising Works Better than Fundraising - <https://www.gailperry.com/why-friendraising-works-better-than-fundraising/>
- 15 Ways to Ensure Non-Profit Donors Happy and Engaged - <http://causeview.com/15-ways-to-ensure-nonprofit-donors-are-happy-and-engaged/>
- Five Elements of Strategic Resource Development (Mark Holmgren) - <https://markholmgren.com/2016/08/28/five-elements-of-strategic-resource-development/>

## MARK HOLMGREN



**Mark Holmgren** joined Tamarack in January 2016 to lead its Vibrant Communities initiative and sit on Tamarack's team of Directors. His background includes providing executive leadership to two Edmonton-based, inner city human service agencies focused on addressing poverty and homelessness; as well as providing consultation to a number of groups on issues relating to social housing development, organizational change, strategy development and leadership.

Most recently Mark served as CEO of Bissell Centre ([www.BissellCentre.org](http://www.BissellCentre.org)) where he led a team of 130 staff delivering Housing First services, assertive street outreach, family and children services, and programs in the areas of mental health, addictions, homelessness prevention, FASD interventions, and employment services.

Known for his big picture view and his ability to work on the ground, Mark has a long history of leading and contributing to social innovations that benefit low income people. Examples include leading the collaborative design of the Community Bridge (homelessness prevention); developing a multi-purpose centre with housing attached for hard to house, inner city seniors; leading the development of three social enterprises; and, developing innovative approaches to employing marginalized populations.

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Mark served as a member of Mayor Iveson's Task Force to End Poverty in Edmonton. He also chaired the Mayor's Working Group on Housing and Transportation and played a key role in engaging people with lived experience in his work for the task force.