



FUNDRAISING *Forum*

A Special Message from DVA Navion

Vol. 24 November 2002

Ringling The Changes

By Michael G. Downes
Secretary to Council



The Secretariat: Chris Downes, Michael Downes, Wayne Hussey and Ron Fairchild

We aim to be the consultancy of choice for the non profit sector the world over.

DVANavion has a clear and dynamic mission statement that is specifically focused on how we act, what we do and the benefits we give to our clients.

We also have a powerful Vision of where we want to go. We aim to be the consultancy of choice for the non profit sector the world over.

However, it is more important to see clear evidence that we are "walking the talk". For DVANavion the signs of effort and sacrifice are unmistakable. Partners the world over are taking the roles for which they are best suited though that often means relocation.

Changes at the Top

Wayne Hussey has been named Chairman of the international firm. Wayne is a dynamic and charismatic individual who brings a great deal of vision to the role. For over 25 years, he worked in a variety of institutional settings including municipal government, education and not for profit organisations. He is well known for his great work specialising in team building and rapid strategic and project planning. Wayne was President of DVANavion in Canada these past two years.

Former Chairman and co-founder of DVANavion, Michael Downes continues as

a member of the International Secretariat, (the Executive for the worldwide Group), and becomes Secretary to Council.

Whilst Ron Fairchild will continue as Chief Executive Officer worldwide, Council has also appointed him the new President of DVANavion in Australasia. Our aim is to bring the best practices from North America, especially in the areas of Health and Education, to Australia, New Zealand and South East Asia. Ron will live in Melbourne and take an active role in the supervision of work throughout Australia and New Zealand. He has a very impressive track record in fundraising and was named Fund Raising Executive of the Year in 2000 by the National Society of Fund Raising Executives in Canada.

Chris Downes has moved from Melbourne to Toronto to take up the position of Chief Financial Officer for DVANavion internationally. He consolidates the financial management and administration of the firm and also serves on the International Secretariat.

Graeme Bradshaw, former Deputy Chairman of DVANavion and Australasian President, will continue as a Senior Partner of the firm providing specific advice and supervision for campaigns in New South Wales, Queensland and the A.C.T.

INSIDE INFORMATION

- My View	2
- Run for the Cure	3
- Are You Ready for a Campaign?	4
- Involved, Immediate and Inspirational	6
- New Vision Planning Tool for Universities	7
- Hi-Hope Service Center	8

Continued on page 6

My View

We understand how to work with you as partners in the quest of achieving success in your fundraising challenges.



Wayne Hussey
Chairman of DVA Navion

In my early twenties, my summer job while going to University was running a children's summer day camp in Mississauga, Canada. In the summer of 1975, I was amazed to learn that the father of one of my staff was very good friends with Sir Edmund Hillary. His name was Zeke O'Connor, a former star of the Canadian Football League.

Somehow, I managed to be invited to their home when Sir Edmund was visiting. As one would expect this larger than life New Zealander was as wonderful as he should be. Warm, friendly and ever patient as I am sure the special guests asked the same questions that he likely had answered thousands of times since his great conquest of the world's tallest mountain.

Somewhat at a loss for words, (an unusual situation for me to say the least), Sir Edmund looked me in the eye and asked me what questions I might ask before he needed to depart. I simply asked him, "When did you decide to tackle Mount Everest, sir?" Without a pause he answered in an equally simple manner, "When I knew I was ready".

This simple yet profound answer has significant meaning to **DVANavion** staff and our clients all over the world. Simply needing money for your charitable endeavour does not mean you are ready to run a fundraising program. Like the first conquest of Mount Everest, you must ensure you are totally ready. Like mountains, fundraising campaigns are significant adventures.

And that's why **DVANavion** can be of invaluable assistance to you. Our staff can guide you through the "readiness" phase of your campaign. We know through extensive experience that no matter what part of the world you are working in, there are a number of pre-conditions for a successful fundraising campaign. Two of these pre-conditions are focused on critical "readiness" factors:

- A Track Record of Success
- A Transformational Vision for the Future

Would be donors are interested in both your past and your future. They want you to demonstrate that you are now, and have been, good at doing good. Charities that can prove they are both efficient, (you are diligent in controlling costs and spend wisely), and effective, (you meet the needs of those you desire to serve and help), do far better than those charities that are seen as unsuccessful or inefficient. Donors do not want to simply compensate for a poorly managed operation. Strength attracts strength.

Similarly, prospective donors are attracted to organizations whose vision is seen as very meaningful and one that will transform the agency and/or the "world" that it lives in. Big dreams attract big gifts. Big dreams with clear "schemes" for attainment often attract many big gifts.

What this all adds up to is that charities must take campaign readiness very seriously. In some cases the assaults upon Everest have resulted in tremendous calamities even with experienced climbers. The **DVANavion** staff have climbed these mountains many times before. We have taken our clients through the planning and readiness phases of big and small campaigns. We understand how to work with you as partners in the quest of achieving success in your fundraising challenges.

By the way, my second question to Sir Edmund was equally simple and his answer again profound. "Looking back, what was the single most important factor that led to your successfully climbing Mount Everest where previously all others had failed?" With a twinkle in his eye he responded, "Having Tenzing Norgay as my sherpa and partner".

Strategic Planning, Organizational Audits, Case Planning, Campaign Readiness, Cultivation Programs, Campaigns, Annual Giving, Bequest Societies and more – we're ready to help you get ready. Call us. We'd love to be your partner on the climb.

Run for the Cure

by Deborah Legrove
Vice-President Eastern Canada

At DVANavion our motto is “People and Passion”. You’ll see this in all our materials and on the front cover of our brochures. We believe these key elements are what take a successful development and make it into something truly outstanding. They are also what helps a campaign to surpass everyone’s expectations.

The staff in our Canadian operation has been very fortunate to work with a client that shares our vision. The Canadian Breast Cancer Foundation is a living example of “People and Passion”. They have achieved remarkable success in a short period of time because they understand the important roles people play in a cause.

Established in 1986, the Canadian Breast Cancer Foundation is the largest charitable organisation in Canada dedicated exclusively to supporting the advancement of breast cancer research, education, diagnosis and treatment. To date, it has allocated \$18 million in grants for breast cancer projects and services.

How has it achieved remarkable success in such a short period of time? The CBCF relies almost exclusively upon event-driven fundraising. Its signature event, the Run for the Cure, has grown ten-fold since it began. Celebrating its 10th anniversary last year, the event raised a remarkable \$12 million in a single day.

Back in 1992, almost 1,500 runners in Toronto participated in the very first event. That year, \$83,000 was raised. The CBCF never looked back and the event has taken on monumental proportions. Today the Canadian Breast Cancer Foundation CIBC Run for the Cure is held in over 32 cities across Canada - all on the same day. More than 120,000 people will participate by running and walking this year.

The secret to the explosive growth and success of this event is not in the numbers; it’s in the people. The CBCF has maintained a strong commitment to the volunteers, the supporters and the participants. And it has relied on and connected with people who have a passion for the cause. Every run in every city is organised and conducted by volunteer committees rather than by professional fundraising staff. These volunteers are people who are passionate about this cause and who believe they can make a difference.

A key element of the Canadian Breast Cancer Foundation CIBC Run for the Cure



is the opportunity for participants to run on behalf of somebody they care about or know. Each runner wears a bib indicating whom they are running for and this bib is a constant reminder of why they are participating. It is a way to make a difference in a very personal way. It is this personal connection to the cause that keeps so many people coming back, year after year, to help raise funds for the CBCF. So why has the CBCF been working with DVANavion?

The need to fund research, education and treatment efforts is growing faster than the growth in revenue that is generated by the Run. DVANavion has been working with the Canadian Breast Cancer Foundation to conduct a feasibility study for a major campaign with a focus on individual major giving.

Whatever new direction the CBCF may eventually take, we are confident it will build upon the strengths that have made it such a success so far - like us, they are people with passion.

...the event raised a remarkable \$12 million in a single day.

By Ron Fairchild, CFRE
C.E.O. & President (Australasia)

Are You Ready for a Campaign?

Fundraising, like any endeavor, continues to change and mature with time. Successful organisations involved in fundraising are continually evolving through developing a better understanding of the best techniques and procedures that enhance results. The advancement made in the sophistication level of the charitable sector in the last five years is unprecedented.

Without question, we are in the most competitive fundraising environment in history, and only one thing is certain – the competition for the charitable dollar will get more intense. Across the world, the increasing need for funds, as well as the number of new charities entering the playing field, impacts fundraising organisations substantially. Our donors are becoming inundated with requests and are finding it increasingly difficult to respond to all the “worthy causes”.

With this as the backdrop, it is obvious that when launching a campaign, the need to be more prepared than ever before is paramount.

A campaign can be a wonderful experience that helps to elevate an organisation to new heights and momentum with long-term benefits. Conversely, if not conducted properly, a campaign can do irreparable damage to relationships with donors, the reputation of the organisation and future fundraising activities. Those that choose to race into a campaign without good planning up front, generally regret their action after it is too late to fix their problems with minor modifications. Launching a campaign without conducting a proper Internal Readiness Program is similar to flying an airplane as you build it.

Ebert Hobbs, my mentor and the former Deputy Chair of **DVANavion**, has a saying, “*Campaigns are won or lost in the first months, not the last months*”. In other words, how effective you are with your early planning, structuring and building “buy in” from the key internal leaders is critical. The rest is simply a matter of implementing and working the plan. Get it right at the beginning and you will be celebrating at the end.

A Changing Landscape

In the mid 1990’s I attended a fundraising

conference where much of the discussion focused on the belief that campaigns were on the way out. The opinion at the time was that mature fundraising organisations were moving toward comprehensive programs with enhanced major gift activity. Therefore, campaigns would no longer be needed. While the rationale was strong, the facts simply did not support the notion that campaigns were dead.

Now, in 2002, campaigns are still alive and well with a substantial increase in the number of programs and size of goals. However, there has been one very significant change – the relationship between the campaign and other ongoing fundraising within the organisation. Many charities are now viewing a campaign as a regular part of their long-term strategy. In other words, rather than a rare occurrence in the life of the organisation, campaigns are seen as part of the fundraising cycle. This cycle includes an annual program which incorporates a major gift component that will “spike” every three to five years with a special campaign. Still others use the unique nature of a campaign to help launch or “springboard” their fundraising into an advanced annual major gifts program.

Without question, the days of campaigns being totally separate and distinct are past. The trend is toward building programs that are linked and have a relationship to enhancing sustainability.

Values of a Campaign

Campaigns can be wonderful events in the life of an organisation. If conducted properly, there are few fundraising activities that can rival the dramatic impact a campaign can make.

A campaign will:

- Secure funding needs quicker and at a far greater level than annual funding.
- Build a significant major gift donor base.
- Increase the visibility and credibility of the organisation.
- Elevate the annual fund potential.
- Help build a strong volunteer leadership base.
- Hone the skills of the development staff.
- Unite the organisation’s constituency in a common cause.



Ron Fairchild

Campaigns are won or lost in the first months, not the last months

The Ultimate Factor for Success

I have had the privilege of being involved in over 100 campaigns. I have seen many programs exceed expectations and some that have struggled. Those that do well have common characteristics that help push them to succeed, and rise above the challenges.

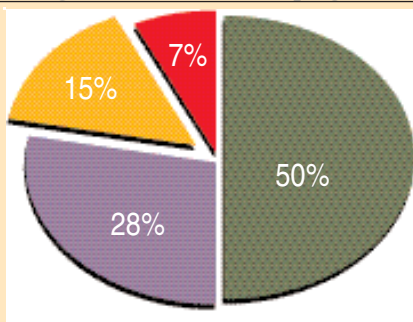
Strong and dedicated staff and volunteer leadership that is truly committed to success, supercedes all factors in your ability to accomplish the goal. If your leadership is weak or does not have sufficient level of commitment, your program will struggle. Strong leadership can counteract weakness in other aspects of the campaign. However, nothing can mask weak leadership.

A Substantial Change for the Better

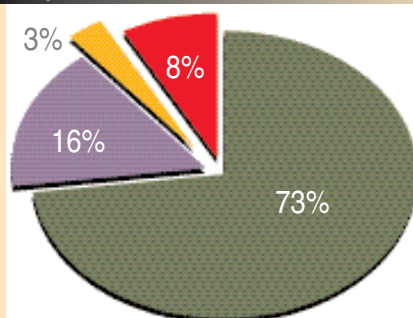
In the last number of years, we have tracked a continuous increase in the size of gifts being given to our campaigns. The most significant “jump” has taken place in the last 3 years, where unprecedented levels of gifts have been received.

In the charts below, we illustrate what was projected in the original campaign planning, (chart above) and what ultimately was received, (chart below). As the charts demonstrate, we received 23% more from large-end leadership gifts than we had projected - outstanding news for the projects.

Giving Levels - Select Campaign Results



Projected



Actual

- Leadership Gifts
- Major Gifts
- Special Gifts
- General Gifts

Internal Readiness – Setting the Stage for Success

The complexity of the charity will determine the length of time it will take to properly prepare your campaign. One observation I have made is that, in recent years, getting ready is simply taking longer. Factors, such as the availability of the top internal leaders, how thoroughly the key stakeholders have “bought in” to the Case and how much cultivation is required to excite top donors, will dictate your planning timetable. Time availability is always a factor that we must work through. My experience is that available time directly correlates to the urgency of the matter. In other words, people will always find time if it is a true priority, no matter how busy they may appear.

In dealing with the internal buy-in process for the Case and the development of a strong cultivation program, you must not cut corners or you will run the risk of paying the significant price of having an internal constituency at odds over the program and/or limiting the financial potential from some vital prospects.

In many instances, strategic planning and priority setting for a campaign has been done with a relatively small “inner circle” of the organisation. This makes a significant assumption that what is agreed to at the most senior leadership level will be accepted by the entire organisation. In order to protect against any possible backlash from other vital players, the initial campaign strategic planning should be expanded to a broad audience of participation. For example, universities should include the faculty Deans and hospitals should include physicians and not just those serving on the boards. Organisations should look to be more inclusive than the past model of exclusivity in the planning process.

The Final Word

Are you ready for a campaign?

It depends on the strength of conviction to plan properly, dedicate the time necessary, focus on the things that really matter and rise above the challenges. In my opinion, to be ready you must complete the following:

- High level strategic planning
- Win the campaign on paper
- Develop effective systems and procedures
- Build an outstanding team
- Understand the challenges and obstacles
- Test, validate & cultivate support

Are you ready for a campaign? If you are ready to inspire others– then the answer is YES.

Campaign

Are you ready for a campaign? If you are ready to inspire others – then the answer is YES.

By Chris Downes
Chief Financial Officer and
Specialist Telefundraising
Consultant

...a 20,000
database can
be contacted
within eight to
ten weeks.

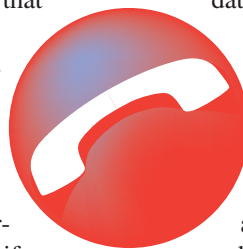
Involved, Immediate and Inspirational

It would be nice to believe that the association you have with your donors is unique.

It would be nice to think that you would remain a top priority in their scale of philanthropic importance.

How well can you really understand your donors or constituency if you never talk to them? What if you could talk to them one-on-one interacting in 'real time'? Not a one sided conversation through a letter but two people, someone from your organisation and your donor actually talking to each other.

Telefundraising allows you to do this. It is not Telemarketing; no cold calling is involved. The combination of a letter and phone call can do marvellous things. It will provide the greatest PR experience you could imagine. It will contact many people in a small amount of time. A 20,000



database can be contacted within eight to ten weeks. It will raise large amounts of money, higher average donations and greater response levels than any mail campaign can deliver.

It will open your eyes to a better understanding of your constituency and inspire those within your organisation and your supporter base to consider a stronger bond and commitment.

How about these results? A University conducted a campaign to 29,000 Alumni and raised \$1,200,000, not including a six figure bequest previously unknown. A Secondary College contacted 6,500 former collegians and raised over \$250,000.

It is an important part of any fundraising campaign to make an effort to communicate with your supporters. To do so will have your donor involved, give you immediate results and provide a bond between you both that is inspirational.

Ringling The Changes Continued from page 1

Two New Divisions in Canada

After a record year in 2001/2002 where the Canadian business grew by over 40%, the DVANavion Council decided to divide that business into two separate Divisions in order to properly serve our many clients.

Sue Egles has been named President of Eastern Canada. Sue joined us in 1997 and has skillfully served as Vice-President. She has 17 years of fundraising experience and since joining the firm has worked with many clients from all sectors. Sue leads the largest business in

our worldwide firm.

Ross Marsh has become President of Western Canada. Ross has been with the firm for 12 years and has successfully managed many clients all over Canada. He is an award winning fundraiser and is particularly well known for his work in Major Gifts campaigns and Total Development.

Chris Hobbs has moved from his role as Chief Operating Officer in Canada to that

of Senior Vice-President in Eastern Canada. He is responsible for project management and service.

New Partner announced

Colin Baillie has been made a partner and member of Council. He is based in Melbourne and has established himself with fine work for many clients and especially the Melbourne Zoos. Colin was formerly part of our South African team.

Expanding our international research capabilities

DVANavion has appointed *David White* as International Director of Research. A seasoned fundraising professional, David is a leading authority on prospect research. He now leads an international resource based in Toronto and this research capability is available to all DVANavion offices and clients for the improvement of their campaigns. We will also contract directly with organisations requiring only our research services.



Sue Egles
President of Eastern Canada

New Vision Planning Tool for Universities

By Wayne Hussey
Chairman of DVA Navion

The Navigator Strategic Planning process is unique in a number of ways. Firstly, the services are performed quickly. This means that the benefits of the process are immediate and billing time is kept to a minimum. Secondly, the outcomes of these products are practical. This results in action that quickly improves the performance of the client organisation. Finally, the product designs are relatively flexible. They are constantly reworked in order to have maximum utility to a university or school.

The Fundraising Vision Day

With a minimum of meeting time, a not-for-profit organisation or Foundation can generate a full Strategic Plan with a Vision (their preferred future), Mission (a simple yet clear descriptor of who they are today), seven Performance Goals, and up to 20 specific and measurable action objectives.

Various designs are used to suit small business, global corporations, educational and charitable organisations.

Many strategic planning exercises take place over several days with considerable time and cost involved before the event and often days or even weeks afterwards before you receive the planning document. With The Navigator this is not the case.

Direct **DVANavion** involvement in the process is usually over the equivalent of five days. Days 1 and 2 are gathering background information and preparing to conduct/facilitate the process. Day 3 is the actual conduct/facilitation. Days 4 and 5 are preparing a written report on the outcomes, and preparing a fundraising strategy for the client.

A minimum of one full day is required from all the key players so that there is full opportunity for active participation and a buy-in by all concerned to the actions, Mission and Vision adopted. The commitment and involvement of key stakeholders like the Vice-Chancellor and School Principal is vital.

In order to confine the active participation to as short a period as possible, the advance gathering of some essential information about the client organisation is essential.



A typical set of objectives of a Foundation Vision Day should include:

- A clear, practical, and simple Vision statement describing the preferred future of the organisation (Foundation) and its advancement program.
- A Mission statement which is a 30 second 'commercial' that describes the essence of the client's fundraising.
- Both the Vision and Mission should be single sentence statements that are easy to remember and 'bring to life'. They are crucial to guiding the key action plans that are generated in the next phase.
- Identifying a limited number (3-4) of significant visionary projects that demand considerable funding and that have a genuine prospect of attracting corporate partners and/or private financial support.
- Identifying and prioritising key performance goals for your fundraising program.
- Developing an operational plan as a clear timetable for its implementation. The final revision to the plan and implementation timetable are delivered within 48 hours of the meeting.

The fee for conducting a Fundraising Vision or Strategy Planning Day is quite modest and depends upon the size and sophistication of the client organisation and its advancement/fundraising program.

The commitment and involvement of key stakeholders like the Vice-Chancellor and School Principal is vital.

By Ed Laity
President (U.S.A.)

Hi-Hope provides quality services to adults with mental retardation in a caring environment that builds self-esteem...

Hi-Hope Service Center

Lawrenceville, Georgia

Founded in 1958 as the Gwinnett County Association for Retarded Citizens, the Hi-Hope Service Center found itself at the proverbial crossroads. With limited resources, a lack of organisational focus, an aging client population, stagnant funding and a significant management turnover, the Board of Directors needed advice and counsel on both the present and the future. Serving more than 135 adults through various programs and services, Hi-Hope had potential, yet needed to be reminded of its mission of action, a vision of service and a legacy of caring.

In May 2001, Hi-Hope retained **DVANavion** to assist with a strategic planning exercise. The board hoped that through a series of interviews, a weekend retreat and the use of outside counsel, that a three to five year strategic plan could be created. After individual interviews with each of the members of the Board, **DVANavion** facilitated a planning retreat that outlined a new mission, vision and strategic thrust for the organisation. One hundred percent of the Board attended the retreat, sharing the joy of service to this worthy institution. Once the final planning document had been presented and approved by the Board, it quickly became evident that both fundraising staff and a major campaign effort would be necessary to attain the new vision for the organisation.

Again, **DVANavion** was retained, to assist with an executive search program for the first-ever Director of Resource Development and to begin a feasibility study to determine the potential for a multi-million dollar capital and endowment campaign. The search process uncovered an individual with the passion and soul to work with adults with mental retardation. The feasibility study outlined the potential and necessary steps to embark on a \$3.5 million campaign to renovate the current facility, expand programs and services and create a small endowment for future operations.

The campaign is currently underway, with the full backing and financial support of the Board, the staff and the families at Hi-Hope Service Center. Success is assured because the proper foundation was laid. Through the energy and enthusiasm of the Board, professional staff and the work of **DVANavion**, Hi-Hope will continue to meet the changing needs of adults with mental retardation. The new mission statement says it all: *Hi-Hope provides quality services to adults with mental retardation in a caring environment that builds self-esteem and a sense of accomplishment through a variety of individual choices.*



Canada & USA

Atlanta Office

3525A Habersham at Northlake
Tucker, Georgia 30084
Tel: (404) 688 4410
E-mail: atlanta@dvanavion.com

Calgary Office

444 - Fifth Avenue S.W.
Suite 1120
Calgary, Alberta T2P 2T8
Tel: (403) 216 8470
E-mail: calgary@dvanavion.com

Montréal Office

2120 rue Sherbrooke Est,
Bureau 217
Montréal, Québec H2K 1C3
Tel: (514) 284 5665
E-mail: montreal@dvanavion.com

Toronto Office

1 Eglinton Avenue E.
Suite 801
Toronto, Ontario M4P 3A1
Tel: (416) 544 9700
E-mail: toronto@dvanavion.com

Vancouver Office

35 - 23281 Kanaka Way
Maple Ridge BC V2W 1Z2
Tel: (604) 467 5402
E-mail: vancouver@dvanavion.com

Australia

Adelaide Office

PO Box 670
Mt Barker SA 5251
Tel: +61 8 8378 3637
E-mail: adelaide@dvanavion.com

Perth Office

Suite 1, 12 Prowse Street
West Perth WA 6005
Tel: +61 8 9486 4447
E-mail: perth@dvanavion.com

Sydney Office

1B Napoleon Street
Sydney NSW 2000
Tel: +61 2 9279 0444
E-mail: sydney@dvanavion.com

Melbourne Office

Unit 14, 83 High Street
Kew VIC 3101
Tel: +61 3 9853 5111
E-mail: melbourne@dvanavion.com

New Zealand

Auckland Office

91A Market Road
Auckland 1003, New Zealand
Tel: +64 9 523 1403
E-mail: auckland@dvanavion.com

South Africa

Cape Town Office

4 Hildalan Road
Claremont 7708
Cape Town, South Africa
Tel: +27 21 674 0803
E-mail: capetown@dvanavion.com

HI-HOPE