



25th Anniversary Donor Solicitation Key Points for Discussion

Who are we and what do we do?

The Community Foundation of Portage and District is a public foundation serving the charitable needs of donors and grant seekers the City & RM of Portage la Prairie. The contributions of donors are pooled into permanent, income earning endowment funds which continue to grow in order to provide funding for local community priorities for many years to come.

What have we accomplished?

- Awarded over **\$2.5 million in grants** to charities in the following sectors: social services, arts and culture, medical services, physical fitness & health, education, children, youth & family, & environment
- Raised over \$8.3 million since launch in 1994 either to the general endowment fund or specific funds
- Since our inception over 1400 donors have made a gift to CFPD

What's an endowment?

Donors make a gifts to our endowment fund that is held in perpetuity with a portion of the annual income allocated to charitable causes.

Donors can have as much or as little involvement with selection of beneficiary by selecting different types of funds:

- Donor Advised
- Designated
- Undesignated
- Field of Interest
- Award or Bursary

Examples of Support Given to the Community over 25 years:

- | | | | |
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| • Various Day Care Facility Renovations | • Centennial Community Club Arena Upgrades | • Habitat for Humanity Project Grants | • La Verendrye School Family Room |
| • Art Smarts Program | • PCI Plaza | • Scouts Camping Gear | • Tennis Court Resurface |
| • Non Profit Office Equipment | • Rotary Republic Park Ball Diamonds | • Numerous School Playground Upgrades | • Herman Prior Centre Upgrades & Equipment |
| • Poplar Point Arena Lighting | • Glesby Centre Building & Equipment Upgrades | • Portage Heritage Inc. CPR Station | • Portage Soup Kitchen Equipment |
| • Crescentview School Code Club iPads | • Koko Platz Rec Centre Playground Upgrade | • CMHA Thrive Recovery College | • Oakville Arena Upgrades |
| • PAWS Pet Carriers | • PDAC Program Equipment | • PCI Angling Program | • In School Breakfast Programs |

25th Anniversary Fundraising Campaign – Why?

First and foremost, we are celebrating our 25th Anniversary to commemorate 25 years of serving Portage la Prairie & District, all of the success we have seen and to carry on the legacy our Founders established in 1994.

Secondly, CFPD has launched a **25th Anniversary Fundraising Campaign** to grow our endowment fund enabling us to increase our support for the community.

Each year CFPD works with non profit organizations, program coordinators and other groups to allocate thousands of dollars back into our community. However, each year we receive almost **three times** the dollar amount of requests than we are able to provide. In order to facilitate these rising demands, we have launched the 25th Anniversary Fundraising Campaign with a goal to reach \$10 million invested in our endowment fund, which in turn would see over \$400,000 given back to non profit organizations, programs and initiatives annually.



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How do you open the first door?

Many existing & potential donors have been identified for our 25th Anniversary fundraising campaign. Initially most will receive an “Ask Letter” and depending on the desired outcome these letters may be followed up by a phone call or meeting.

Prior to contacting these existing and potential donors it’s a good idea to gather some background about the them and prepare what you are going to say during the call. This may include talking to office staff in regards to what type of gifts they have given to CFPD or if there has been any recent contact with the office.

Once you are ready to make the call here are some points to follow:

Tell the foundation story from your perspective. Come prepared with some stories about your favourite grants. Tell them why you said yes to be a board member or volunteer. What is it about the foundation that impresses you?

It’s also an opportunity to learn more about what they are interested in. With this in mind, during the get together, ask the following: *What is it in Portage la Prairie that you are most passionate about? What are you doing to fulfill that passion?*

Listen to what they’re saying and see if there is a fit with the foundation.

And if its an existing donor be sure to thank them for their previous giving up front.

Next state the reason for calling “I’m calling to follow up on our 25th Anniversary Fundraising Campaign Letter that you received from us. Do you remember seeing it?”

You can then follow this part of the conversation with the ask “Would they consider commemorating our 25th Anniversary by making a donation to our campaign” or take the opportunity to schedule a follow-up meeting to discuss a donation further.

Finally thank them for taking the time to learn more about the foundation and discuss our fundraising campaign.

After the call be sure to record any information discussed in the conversation the office staff should be made aware of. Also record and important feedback that may be helpful when soliciting other donors.

If the follow up to the letter includes a face to face visit with a potential donor a “fundraising package” has been compiled with the following information for presentation at meeting:

- Personalized Letter*
- 2017 Annual Report
- 25 Years Fact Sheet
- Why I give Testimonial
- Brochure
- 25th Anniversary Legacy Fund Levels*
- Fund Options Sheet *
- Sample Agreement *

*optional depending on “ask”