

# Office of Advancement

Fund Development

March 14, 2012

Presenter:

Colleen Lathan

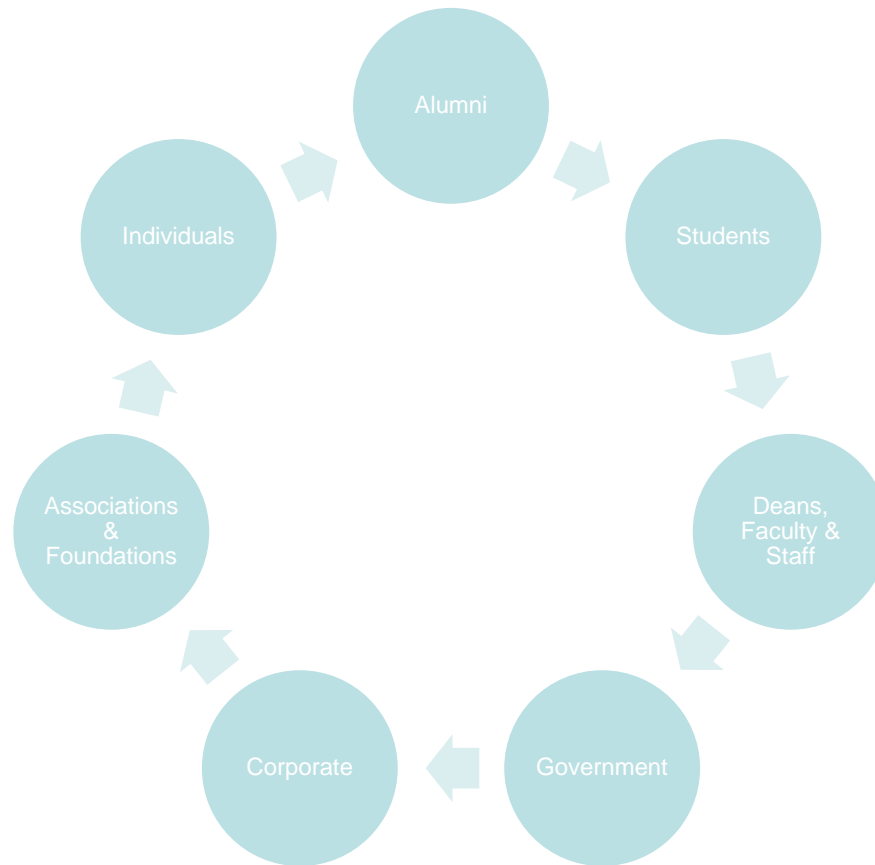
# Overview of Presentation

- ❖ Function of Fund Development
- ❖ Elements of Success
- ❖ Fund Development's Role in supporting the Athabasca River Basin Institute
- ❖ Accomplishments

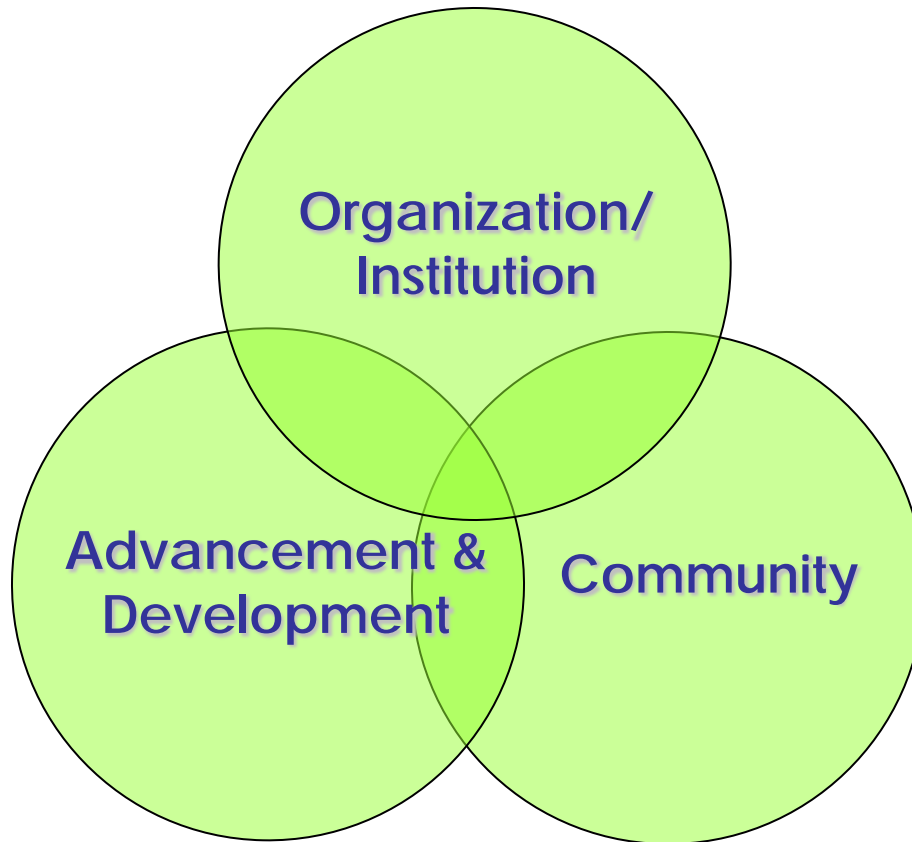
# Functions of Fund Development

- Relationship Building
- Capacity Building
- Resource Building

# Relationship Building



# A Philanthropic Culture



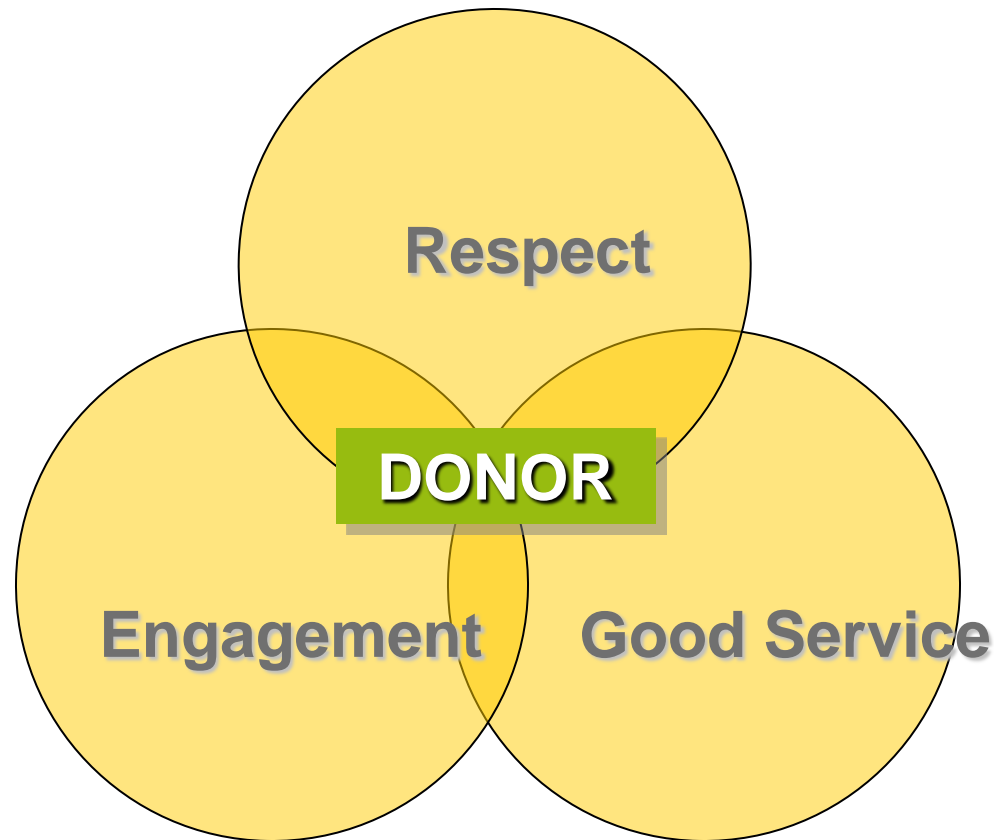
# Capacity Building

- Greater awareness and understanding

# Resource Building

- Sufficient charitable gift resources to support people, programs, infrastructure and research
- Recruitment of volunteers
- Annual, Major and planned giving
- Campaigns

# Donor Centred Philosophy





# Critical Elements of Success

NEED

Vision  
Mission Mandate

Strategic Direction

Priority Needs  
(Case)

Identification

Review

Cultivation

PLAN

Relationship Management

Donor  
& Volunteer

Solicitation

Stewardship

Negotiation

TEAM

Recognition

Institutional  
Leadership

Faculty/staff/  
Internal champions

Development Team

Volunteers,  
Faculty, Staff

# Ingredients For Success

- An inspiring, timely ARBRI mission and vision statement
- A developed long-range strategic plan for ARBRI
- Emphasis on programs/projects (and budgets) which support ARBRI'S mission and vision
- Clear, concise and compelling case for support-proposal
- Strategic engagement and charitable gift leadership from ARBRI Faculty/Director

# Ingredients for Success

- Teamwork on the part of the VP Academic, VP Advancement, Director of ARBRI and Fund Development staff
- Meaningful engagement of influential volunteers
- Recognition and Stewardship of donors

# Key Roles for ARBRI Leadership

1. Serve as the chief ARBRI spokesperson
2. Engage Faculty and staff
3. Actively steward a portfolio of 5 -10 major donor prospects
4. Articulate a compelling strategic vision for the future of ARBRI
5. Support Advancement staff

# Key Roles For Fund Development

1. Prepare the infrastructure, and the database
2. Prepare the preliminary and final case statements for ARBRI
3. Organize and coordinate the moves process and volunteers, or faculty leadership
4. Implement the solicitation plans
5. Communicate progress, milestones and successes

# Positive Outcomes

- Increase levels of gift income
- Strengthen the brand of Athabasca University and the Athabasca River Basin Research Institute
- Engage a committed group of volunteers

# Accomplishments

- RBC support to the Community Engagement Project
- Imperial Oil to BARBI project

# Quote

“Fundraising isn’t a simple process  
of begging –

It is a process of transferring the  
importance of the project to the  
donor”

- Hank Rosso



# Thank You

Colleen Lathan  
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Officer