

Introduction to Fundraising

For Nonprofit Organizations

May 21, 2025
1:00 – 2:00 PM

 **IntegralOrg**



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Moh'kinsstis

Land Acknowledgement

Bearspaw First Nation Siksika First Nation

Piikani First Nation Goodstoney First Nation

Chiniki First Nation Tsuut'ina First Nation Kainai First Nation

Métis Nation of Alberta, District 5 and 6



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Your Facilitator for

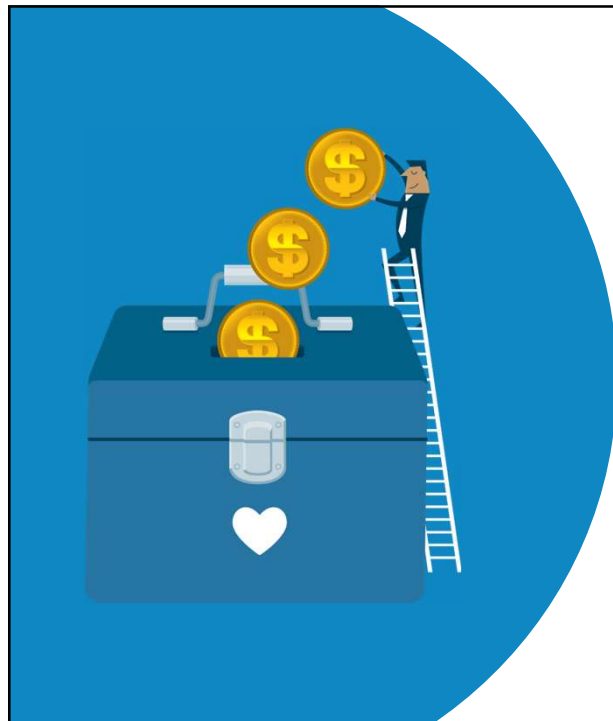
Introduction to Fundraising

For Nonprofit Organizations

Derek Bechthold, CFRE



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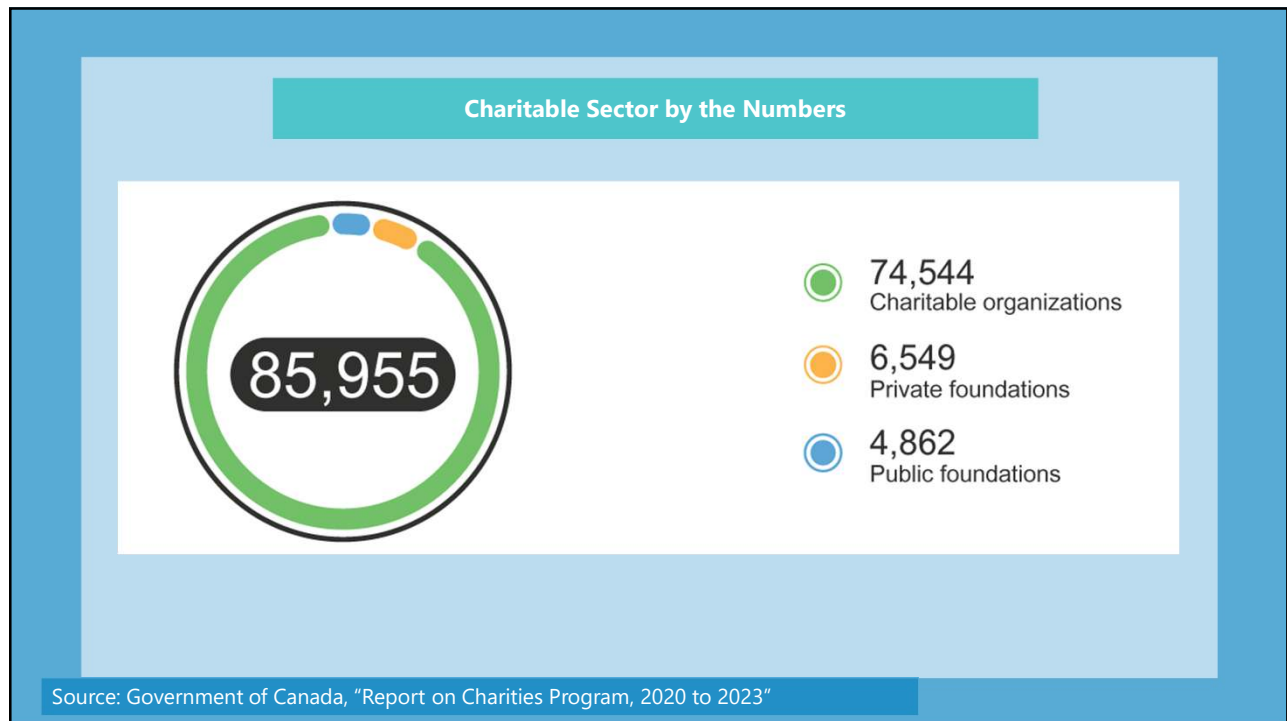
Overview

- Fundraising profession and some trends to keep in mind for 2025 and beyond ...
- Fundraising 101 ...
 - **Return on investment** in fundraising
 - **The Ask** – who, when, and how
 - **Stewardship** – the art and science of thanking
 - **Tools** – enhancing your fundraising

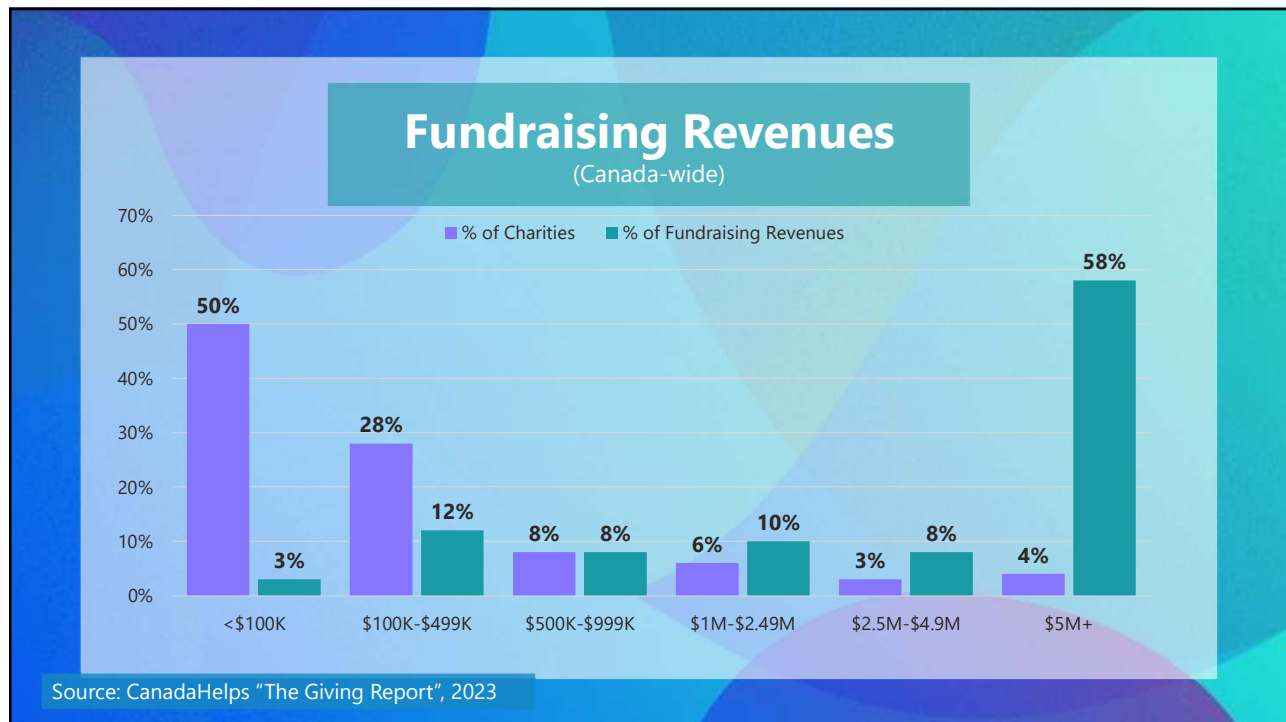
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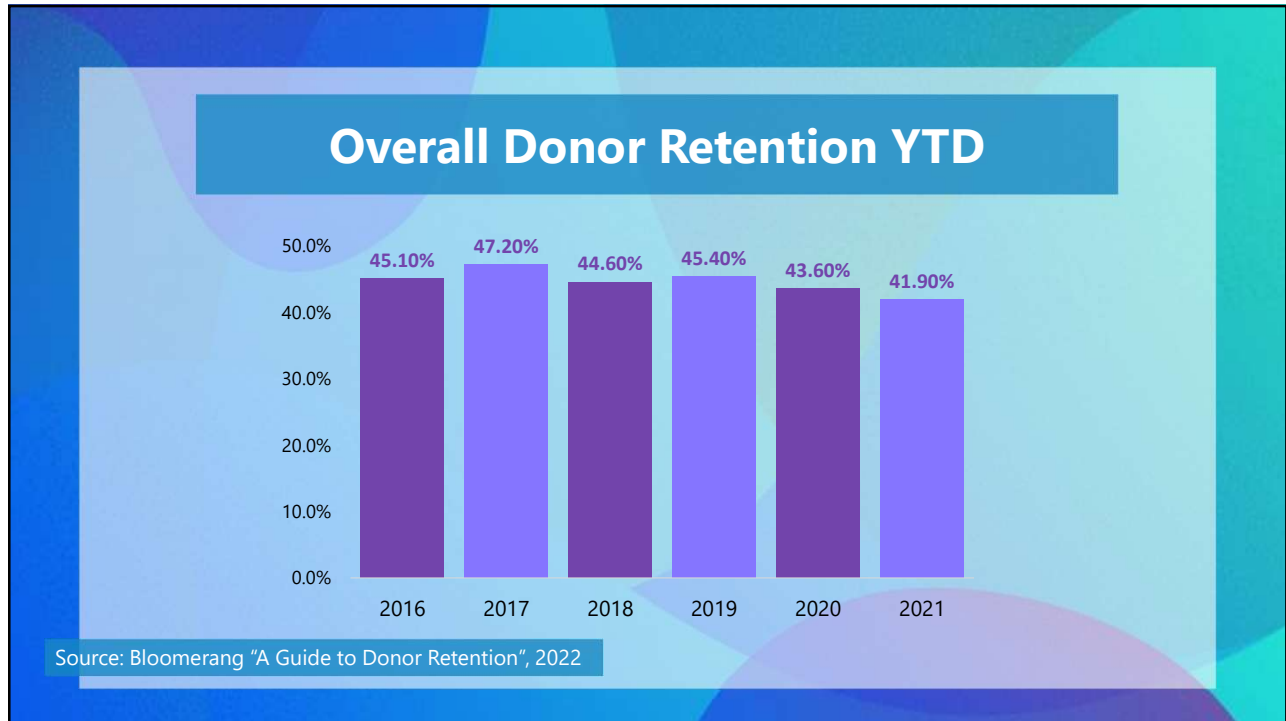
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Summary of Charitable Donations in AB: 2019 to 2023

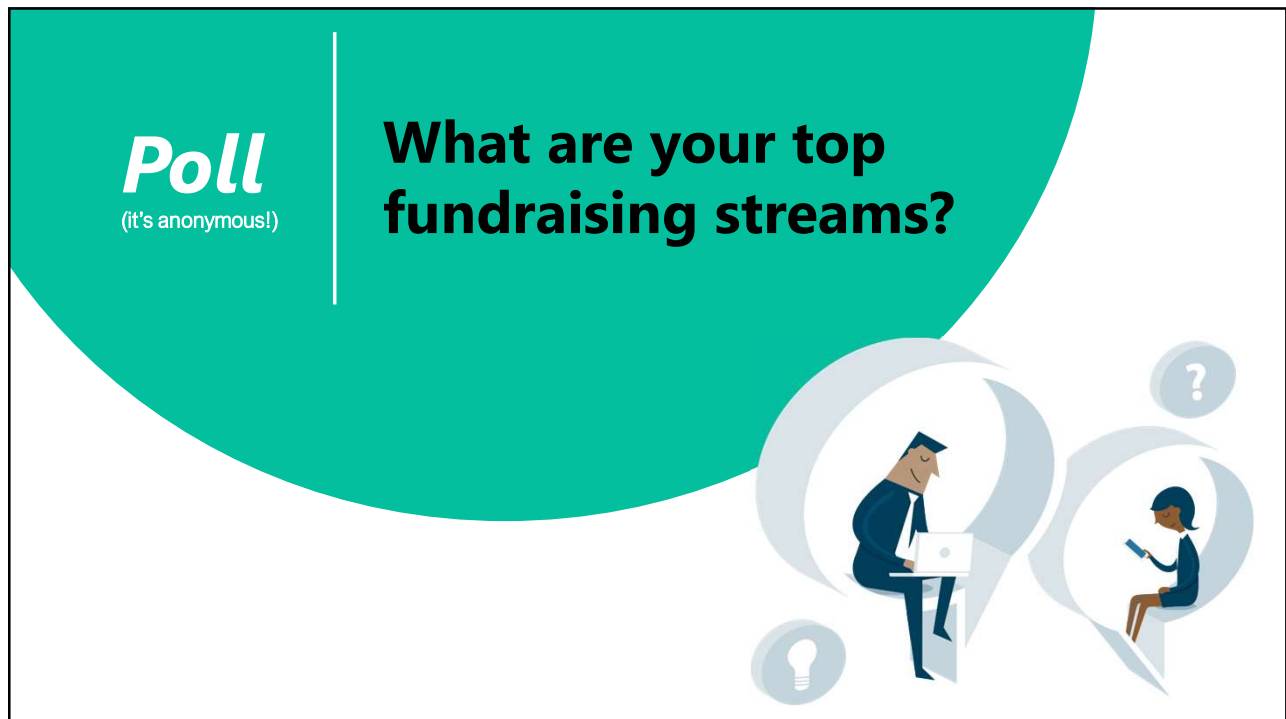
	2019	2020	2021	2022	2023
Number of tax filers	3,020,670	3,076,390	3,096,250	3,217,330	3,403,970
Number of donors	560,600	544,210	528,270	528,720	579,830
Average age of donors	53	53	54	54	54
Dollars					
Average donations, donors aged 0 to 24	910	930	1,100	1,170	1,140
Average donations, donors aged 25 to 34	1,340	1,380	1,510	1,540	1,500
Average donations, donors aged 35 to 44	1,990	2,020	2,270	2,200	2,110
Average donations, donors aged 45 to 54	2,400	2,440	2,620	2,710	2,650
Average donations, donors aged 55 to 64	3,480	3,250	3,690	3,380	3,720
Average donations, donors aged 65 and over	4,330	4,390	4,630	5,640	6,090
Total charitable donations (x 1,000)	1,611,620	1,568,745	1,679,795	1,817,725	2,100,070
Median donations	500	510	550	580	510
Median total income of donors	72,880	72,920	74,150	77,890	80,590

Source: Government of Canada, Summary of Charitable Donors, 2025

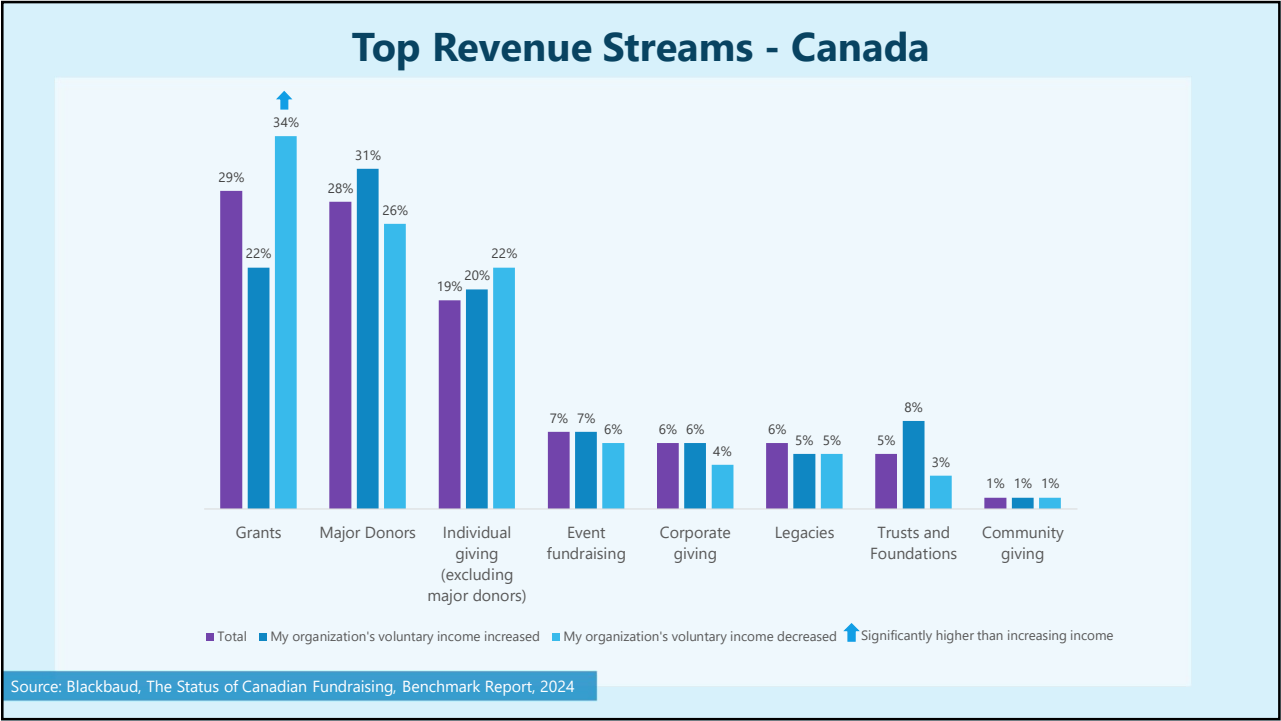
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Donation Rate by Cause Area

Cause area	Total	Age					Donor Status
		18-29	30-39	40-49	50-59	60+	Charitable Donors*
Weighted Total	720	100	96	108	123	294	720
Animal charities (wildlife conservation, animal welfare, zoos)	27%	27%	18%	25%	24%	32%	27%
Arts & Culture (museums, festivals, community art, theatre, children's programming)	9%	10%	6%	10%	5%	12%	9%
Education	14%	20%	17%	14%	12%	12%	14%
Environment	13%	10%	13%	9%	13%	15%	13%
Health (e.g. mental health, hospitals, specific diseases, etc)	55%	45%	35%	63%	55%	62%	55%
Indigenous Peoples	4%	4%	13%	5%	1%	2%	4%
International (e.g. international social services, health, or disaster relief)	17%	25%	17%	8%	11%	20%	17%
Religious	21%	19%	13%	19%	14%	28%	21%
Social services (e.g. children and youth, domestic disaster relief, poverty, food banks)	40%	35%	37%	34%	37%	46%	40%
Public benefit (e.g. community foundations, funding organizations like United Ways or Rotary Clubs, umbrella organizations, public spaces not otherwise captured)	25%	24%	13%	20%	35%	28%	25%
Other (specify)	3%	3%	3%	2%	6%	3%	3%

Source: CanadaHelps "The Giving Report", 2024

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Fundraising in 2025 and beyond

Things to think about ...

- Artificial Intelligence (AI)
- Recurring Donors and Giving Flexibility
- Peer-to-Peer Fundraising as an Acquisition Tool
- Continued transparency, ethical conduct and accountability



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Fundraising: The ROI

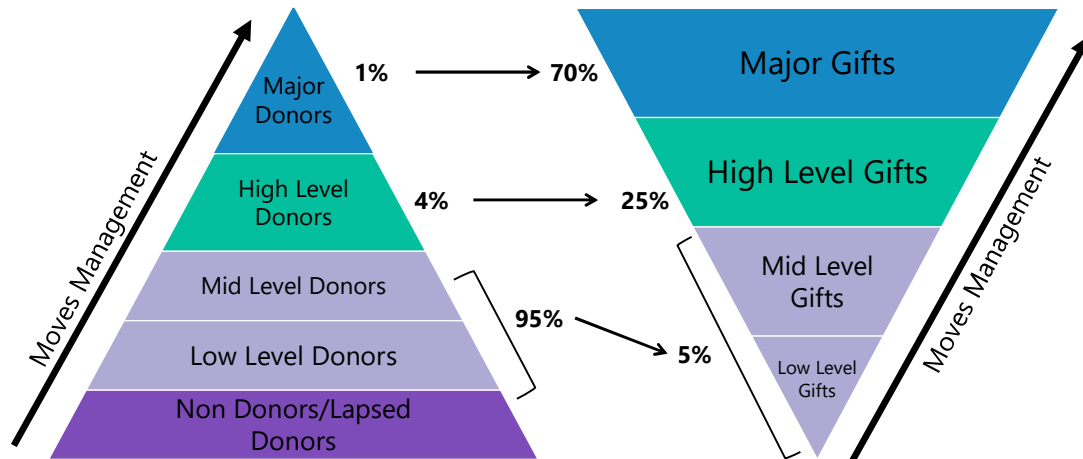
Fundraising Activity	Average Cost to Raise 1 Dollar
Capital Campaign / Major Gifts	\$0.07 per dollar raised
Planned Giving	\$0.07 per dollar raised
Grant Writing	\$0.20 per dollar raised
Direct Mail Renewal	\$0.20 per dollar raised
Benefit / Special Event	\$0.25 of gross proceeds
Direct Mail Acquisition	\$1.00 per dollar raised

Source: Guy Mallabone et al, (2022) **Excellence in Fundraising in Canada, Volume One, Second Edition: The Definitive Resource for Canadian Fundraisers**. Civil Sector Press: Dan Pallotta. Association of Fundraising Professionals.

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Donor and Fund Pyramids

5% of Donors = 95% of \$



Source: Harris Connect: IDC Fundraising Division

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The Ask Who?

Individuals Can you leverage them?

- Board members
- Volunteers
- Staff members
- Your stakeholders (clients?)
- Connections through long standing donors
- Vendors?
- ... and so on ...



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The Ask Who?

Grants

Foundations

- Community Foundations
- Nickle Family Foundation
- The Ed Stelmach Community Foundation

Corporations

- Financial – RBC, ATB
- Telecommunications – Rogers, TELUS
- Oil and Gas – Cenovus, Imperial Oil

Service Clubs

- Rotary
- Kinsmen
- Lions



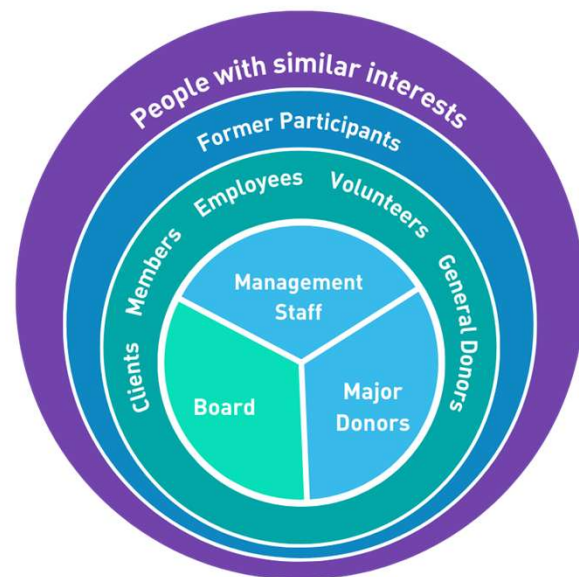
Government

- Community Initiatives Program
- Community Facility Enhancement Program (CFEP)

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Rosso's Concentric Circles of Influence

Source: Rosso, Henry. "The Principles & Techniques of Fundraising", Association of Fundraising Professionals.



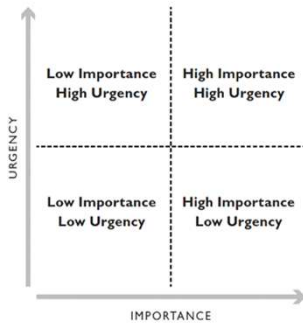
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The Ask

When?

Prioritize

- Do not take on all initiatives or asks at once.
- Set very realistic, bite-sized goals.



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The Ask

When?

Prioritize

Build a **yearly calendar of grant dates**: dates of grant application deadlines. This makes the process manageable and gives you a larger strategic view.



January	May	September
ABC Foundation	DEF Foundation	GHI Foundation

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The Ask

When?



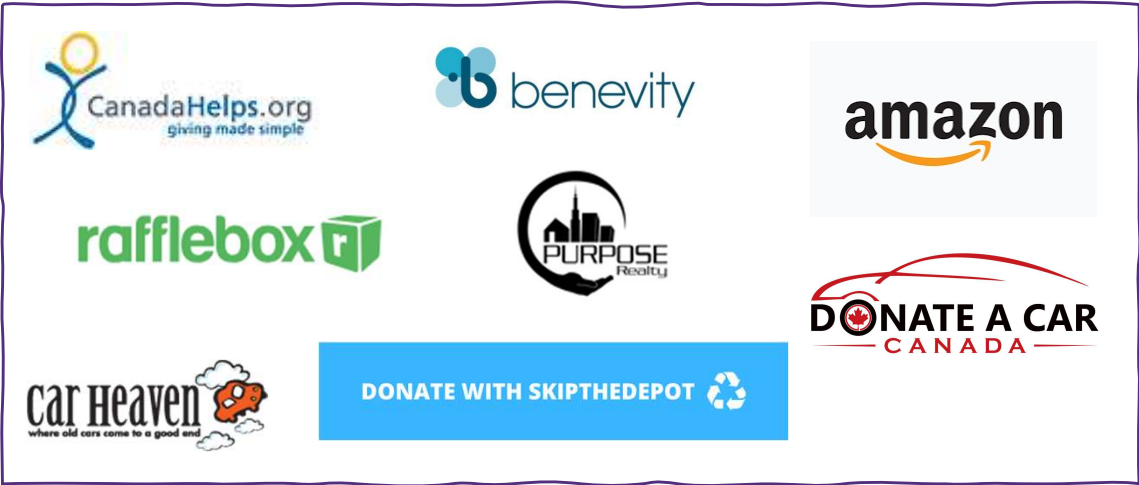
Prioritize

Build in contact and **communication** with new prospects between your grant dates.

January	February	May	June	July	September	October	November	December
ABC Foundation	ABC Service Club	Mail Out Campaign	DEF Foundation	DEF Service Club	GHI Foundation	Individual Prospecting	ABC Corporation	Mail Out Campaign

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Ongoing or Passive Fundraising



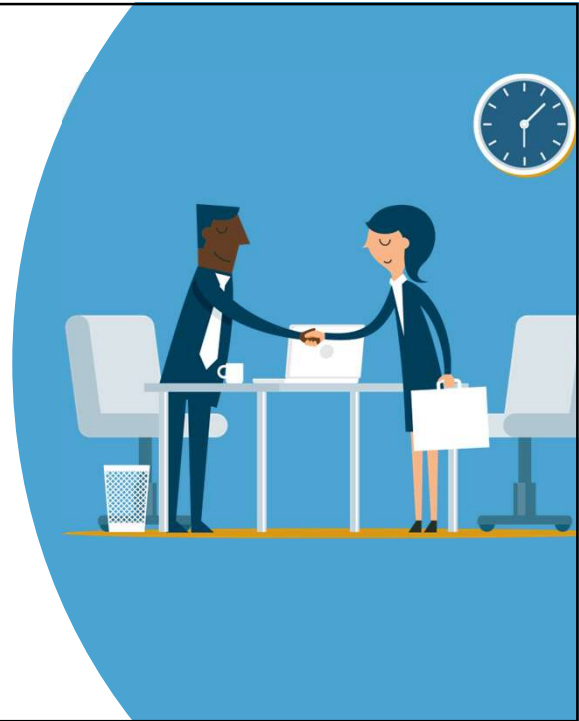
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The Ask How?

Preparation The 5 R's

- ✓ The *right* person...
- ✓ ...asking the *right* prospect...
- ✓ ...for the *right* project...
- ✓ ...at the *right* time...
- ✓ ...for the *right* amount.

If you fail to plan, you are planning to fail
- Benjamin Franklin



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The Ask How?

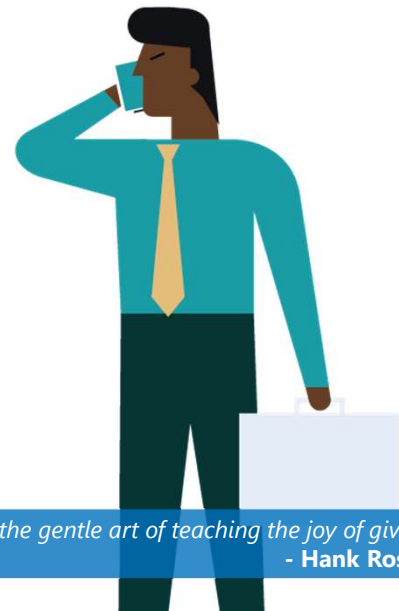
On the day

"Listen the ask" – Listen to the prospect and actualize their philanthropic dreams

- What's important to them?
- Why do they want to donate?
- What are they hoping to achieve?

Your toolbox should contain ...

- Facts, figures, numbers.
- Impacts and outcomes.
- Stories and emotion.



Fundraising is the gentle art of teaching the joy of giving
- Hank Rosso

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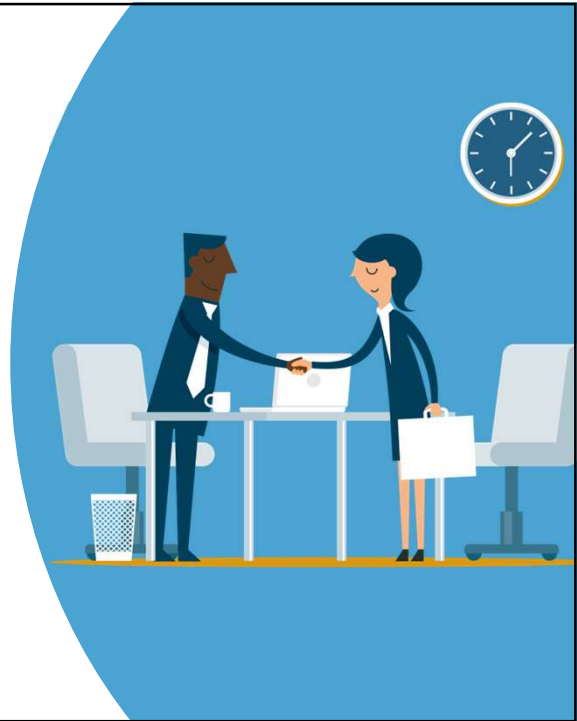
The Ask

How?

The Aftermath

- Thank them – regardless of the outcome.
- Manage expectations – you will receive no's. Be kind to yourself.
- Every ask, every yes, and every no is a learning moment – embrace it!

We need to value donors as much as we need value from them.
- Reinier Spruit



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Stewardship – The Thanking

Thanking is *far* more important than *asking* - you can't properly *ask* for money unless you can properly *thank*.

The Association of Fundraising Professionals (AFP)
Fundraising Effectiveness Report:

Why do people stop giving?

- They were not thanked;
- They were not shown impact; didn't really know what their donation went to;
- Asked too often;
- Financial reasons (much further down on the list).



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In the chat box ...

How do you currently thank your donors?



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Stewardship – The Thanking

What can you do to retain your donors?

- Thank your donors and thank them often.
 - Letters, reports, phone calls, handwritten cards, tours, visits.
- Show impact: share your numbers, facts, and figures.
- Tell stories: triumphs and tragedies.
- Transparency, ethical conduct and accountability.

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel!"
 - Maya Angelou



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Tools for Your Shop

Case for Support

The reasons why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs, and plans.

(Association of Fundraising Professionals)

A 2-pager for your Board, staff, volunteers and donors that shares:

- Who you are.
- What you do.
- Why you do it – statistics.
- How you are able to do it.
- What it costs to do.
- How people can help you do it.

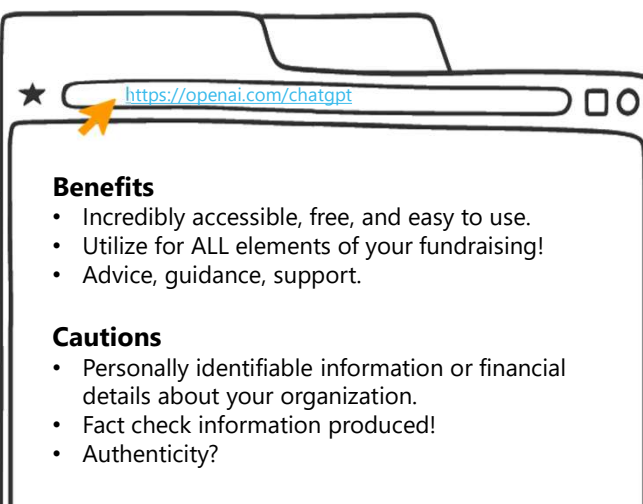
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Tools for Your Shop

Artificial Intelligence (AI)

What is ChatGPT?

Artificial intelligence chatbot that produces human-like responses to questions.



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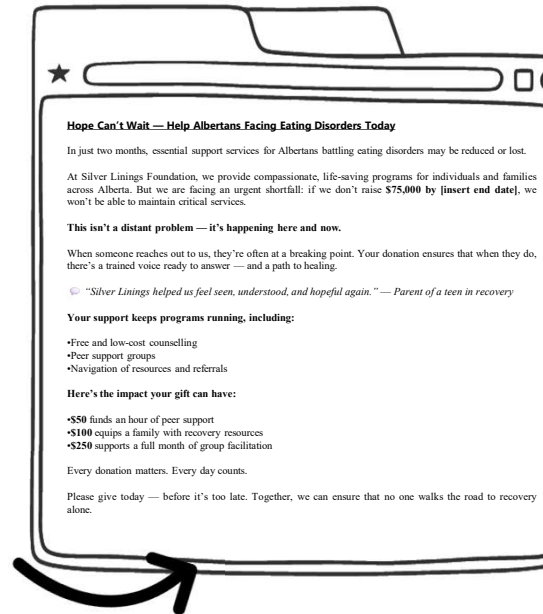
Tools for Your Shop

Artificial Intelligence (AI)

Example: The Silver Linings Foundation (To bridge gaps in accessibility and care of eating disorders in Alberta)

Create a donation ask letter for the Silver Linings Foundation...

- Act as a fundraising copywrite expert and help to prepare a successful fundraising appeal for the Silver Linings Foundation.
- The message should have an urgent tone as the campaign will end in two months.
- The message should show the impact of their donation.
- The message should be in the form of an email.
- It should be about 400 words long and begin with an attention-grabbing subject line.



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Tools for Your Shop

Customer Relations Management (CRM)

A donor database



The goal is to make your life easier!

- Track your donors, their donations, your volunteers and their time.
- Spend the right amount of time on the right people (80/20 Rule).
- CanadaHelps, Salesforce, Little Green Light
- Affordable CRM: Sumac, DonorPerfect, Exceed! through **TechSoup**

"If you need to raise funds from donors, you need to study them, respect them, and build everything you do around them."
- Jeff Brooks

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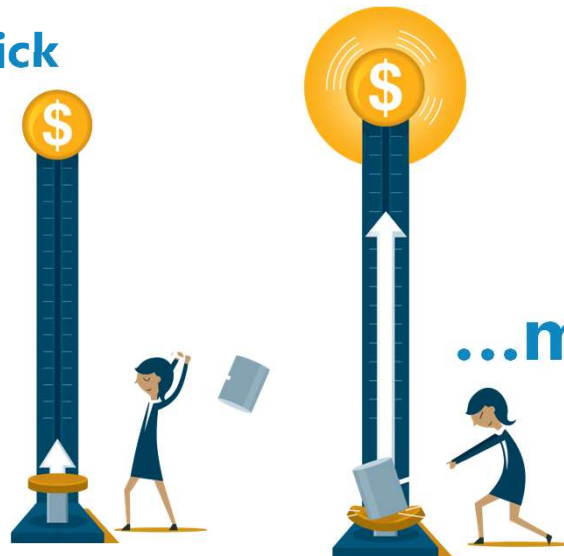
Rome wasn't built in a day.

Neither was a fundraising program!



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**When you pick
an activity...**



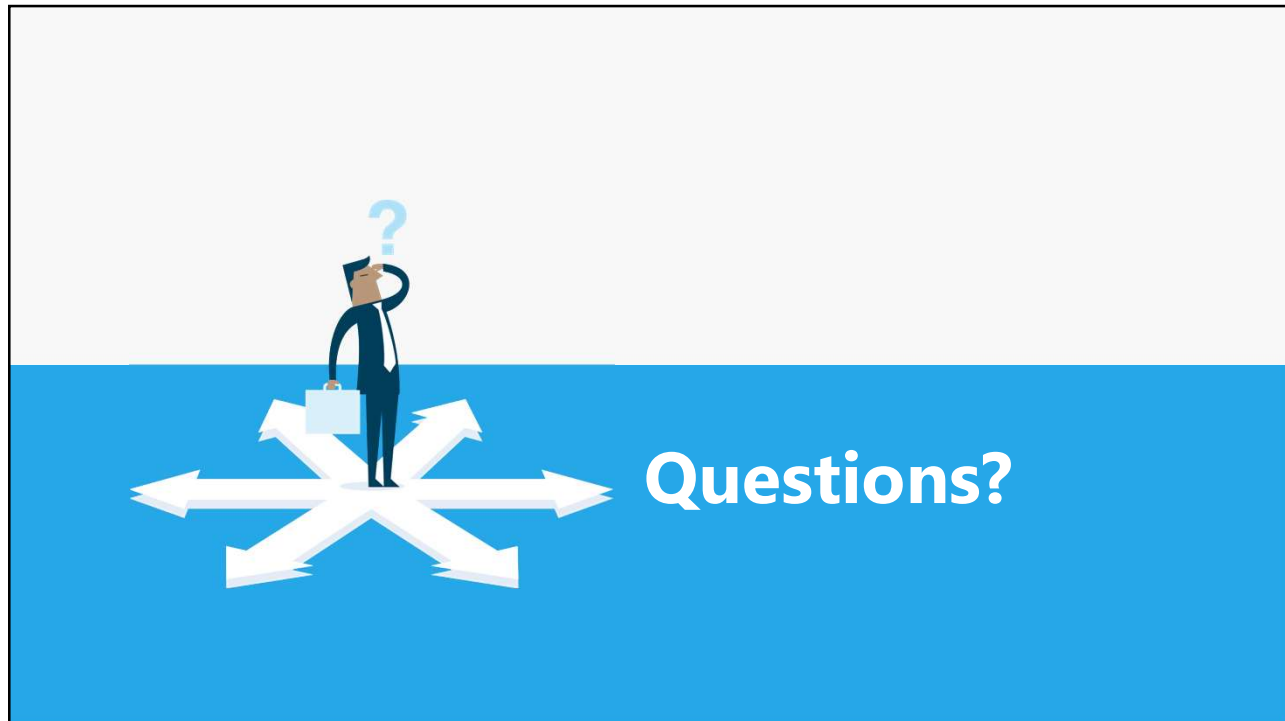
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- Self-paced Learning**
Work through the elements of nonprofit development at your own pace
- Organizational Development Plan**
Get clear on your priorities and next steps
- Expert Coaching**
Receiving coaching from subject matter experts to ensure you are on the right track

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or**

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- Strategic planning
- Policies & bylaws (writing and review)
- Social enterprise legal structures
- Governance and board development

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