



Getting to Give

Ideas and Resources
For Youth Fund Development

"All of us, if we are reasonably comfortable, healthy and safe owe immense debts to the past. There is no way, of course to repay the past. We can only pay these debts by making gifts to the future."

-Jane Jacobs, Community Planner, Canada)



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GETTING TO GIVE

Introduction

There are many different types of Youth in Philanthropy programs - community-based, school-based, partnered with other organizations, and hybrids of various models. But whatever the version, they all "get to give" -that is, they have the responsibility and the satisfaction of giving away money to support good causes in their communities. They get to do something that is fun and rewarding, and that allows them to make a positive contribution while gaining new knowledge, skills and experience that will be valuable in many aspects of their lives.

And most youth philanthropy programs also need to "get to give" - that is, they have to work to get the funds that they give away, and so spend some of their time helping to build their youth endowment fund, and often also raising some funds to support their own activities. So this guide is about YACs "Getting to Give", and it will hopefully give you lots of new ideas and tools to help your YAC get to give as much as possible, because we know that, not only is it better to give than to receive, but by giving, you receive much more than you give! And besides, as Anne Frank said, "No one has ever become poor by giving."

So let's get started....

Typically, community foundation youth advisory councils (YACs) operate as a committee of their foundation, and work to the roles and practices outlined in the CFC document *Explorations: Principles for Community Foundations*. These roles include: 1) Fund Development 2) Grantmaking, and 3) Community Leadership

All three roles are important and dependant on each other; if it doesn't have funds, a YAC has nothing to grant to worthwhile projects. When a YAC makes grants, they demonstrate to potential donors why they are worth supporting. Their leadership activities also help them to get known in the community and to donors, and are especially important when they are just getting started and don't have funds to grant with.

Helpful background resources: *Explorations: Principles for Community Foundations*
YIP Grantmaking Manual
YIPTIPs: YIP: The Community Leadership Role





So how do YACs get money to grant? And to operate?

Ideally, the community foundation creates a youth *endowment fund* and works with the YAC to help build the fund so that it generates enough investment income to meet the YAC's granting needs. The granting needs will depend on the size of the community, and it may take awhile for the fund to get big enough to respond to all the grant requests the YAC finds worth supporting. But YACs can often make *flow-through grants* with money they have raised themselves, or been provided with by their parent foundation or another donor. Flow-through grants are especially important in those early days so that YAC members can get granting experience, get known in the community, and get some grant stories to share so that donors and others can see why the YAC is worth supporting.

YACs usually also need some *operating funds* to cover costs such as refreshments for meetings, printing grant guidelines, application forms and brochures, or undertaking leadership activities. Some YACs are given an operating budget from their parent foundation; others undertake fundraising activities to obtain the funds they need. Some YACs that already have a large endowment fund make a small grant to themselves each year to cover their operating costs. Developing a realistic operating budget is an important part of a YAC's annual planning so that it knows how much its activities will cost and how much it will need to raise to do its work.

This is probably a good time to make sure we're clear about some of the terms we've used here, and other useful definitions in the lexicon of philanthropy. To help you out, a *Glossary of Terms* has been included as an appendix to this resource. It may provide more detail than most YACers need for their fund development activities, but it's a good idea to get familiar with the basic terms used in fund development and foundations. Your community foundation may also have other terms that are important to know about – *founder's circle*, *honorary board*, *Leave-a-Legacy* or other activities, funds or programs. But staff or board members, or your adult advisor will make sure you have the information you need to speak knowledgably about the community foundation, and will be there to support your YAC in its fund development activities.

More information:

- your community foundation website
- Community Foundations of Canada website: www.cfc-fcc.ca
- Professional Advisors E-Resource: www.cfc-fcc.ca/prof-advisors/index.cfm
- Council of Michigan Foundations "Youth Grantmakers Contribute to Community Foundation Growth"
www.youthgrantmakers.org/Documents/Youthcontributes





Fundraising & Fund Development - so what's the difference anyway?

Most youth have been involved in *fundraising* of some type or another, whether selling chocolate bars to help raise money for a school band trip, or doing a car wash to raise money for charity. Regardless of the end cause or means to get there, fundraising usually involves product sales, planning and running an event, or a solicitation campaign, such as coin boxes, or mall displays. The right type of fundraising activity can be a good way to raise operating dollars, get experience with organizing events, do some team-building among the group, and generate some publicity. However, they are usually a lot of work for the amount that they raise, and may put the YAC in competition for funds with other youth organizations.

Fund development, on the other hand, is a more long-term approach that focuses on building relationships with individuals and organizations that are interested in supporting the work of the community foundation and its YAC. It involves marketing, cultivation and solicitation activities aimed at attracting gifts, both in the short-term and the long-term.

| FUND DEVELOPMENT | FUNDRAISING |
|---|---|
| <p>Basic Approach/Concepts</p> <ul style="list-style-type: none"> • Commitment of Board, staff, volunteers • Service to donors is a priority • Policies, guidelines, procedures in place • Administrative, investment, and record keeping capacity available • Detailed plan with short & long-term goals • Organizational strength: credible, valuable, long-term, accountable • Understanding of regulations required • Availability of professional expertise • Significant number of gift prospects available | <p>Basic Approach/Concepts</p> <ul style="list-style-type: none"> • Project oriented • Short-term approach; year-to-year • Unreliable, possibly risky • Limited return relative to investment of time and resources • People usually get something in return for their \$\$ - product, chance to win a prize • Many donors, small amounts • Attractive to corporate sponsors • Potential for publicity |
| <p>Activities</p> <ul style="list-style-type: none"> • Establish endowment funds • Prepare marketing materials; communications plan • Train staff and volunteers • Research and identification of potential donors (prospects) • Engagement of professional advisors • Development of planned giving program • Involve influential, affluent people • Donor acknowledgement and recognition • Donor engagement and education • Evaluate results, review and revise plan | <p>Activities</p> <ul style="list-style-type: none"> • Door-to-door fundraising • Golf tournaments • Dinner, luncheon, gala, ball • Auction • Direct mail • Annual campaigns, telethons • Gaming: bingo, casino, raffle, lottery • Walkathon, run, bowlathon, etc. • Sales: chocolates, cards, chicken, cookies etc. • Bottle drive, carwash, coin drive |



Getting Ready: What will it take?

Successful fund development takes preparation, planning, commitment and follow-through, and just as important, teamwork, energy, and enthusiasm!

An important part of preparation is **orientation and training**, to ensure that all YAC members are capable of and comfortable with talking about their YAC and community foundation, and why they are worth supporting. **Creating a plan** is the next step, including identifying both **short-term and long-term goals**, the **activities** that will help achieve them, **key messages**, **potential donors**, and the **timeframe** for the plan. The activities will need to be supported by **materials**, such as brochures, the foundation's annual reports, grant stories, photos and other presentation materials. There will also need to be **coordination** with the parent community foundation - both their fund development activities, as well as any events they have planned. Sounds like a lot of work, but once you get organized with a plan, fund development becomes a routine part of YAC activity, and the results of a growing youth endowment fund are a great reward!

Youth Advisory Council Fund Development Training

Planning and relationship building are important for successful fund development. A training session that includes advice from local funders will not only help YACs to start their planning, but will also help to start building relationships. The whole workshop will require approximately 3 hours, with the first part dedicated to the panel of funders. In some YAC training sessions, Mayors or city councilors have presented, along with someone from a service club, such as Rotary, and a local business. Set the date well in advance and have YAC members confirm arrangements with guest speakers, and all other YAC members. It is also a good idea to invite the chair of the community foundation's fund development committee or fund development staff as resource persons.

Panel:

- ✓ Representatives from funding organizations, such as service clubs, local government, business or private foundations.
- ✓ Each representative is introduced and asked to speak for approximately 10 minutes about their organization's funding availability, how to apply and any tips or "dos and don'ts"





- ✓ Questions may be asked after each speaker, or following all of the presentations. Approximately 1 hour should be allocated for the panel. Speakers should be formally thanked by YAC members. A written thank you should also be sent after the event.

Debrief:

Once the speakers have left, approximately 10 minutes should be spent on debriefing the presentations. What were the most important points made? Were there any surprises? How can the YAC use this information in its planning?

Discussion:

Fund Development vs. Fundraising

What is the difference? When is each appropriate for a YAC?

Why people give

List motivations for giving by brainstorming. Ask participants to think of why they give. Compare with information and statistics from "Getting To Give"; also "Survey on Giving and Volunteerism" from Imagine Canada.

Review:

Endowment vs. Flow-through

Operating funds vs. granting funds

Concepts such as matching grants, leveraging, in-kind support

Planning:

Why should people give to the youth council?

Brainstorm to develop key messages

Who could give to the youth council?

Identify prospects. Discuss what makes them good prospects; prioritize.

How do we reach them?

Do YAC or CF board members have any personal connections? Who are the most appropriate people to "make the ask"? What kind of information and materials will be required? What is the timing involved?





Developing a Plan

- Ideas
- Information and research
- Setting goals: short-term and long-term
- Activities
- Coordination, timing

Role Play:

Have 3 volunteers role play “making the ask” in front of the group. One person will act as the potential donor, and 2 people as YAC members. To set up the situation, the donor should be identified and how the meeting was arranged should be described. After the role play, observers provide feedback, focusing on the positive and offering suggestions for improvement.

If time permits, continue role playing, either with other volunteers in front of the whole group, or in small groups, until everyone has had a chance to “make the ask”. This helps to raise everyone’s comfort level in talking about the YAC with donors, and to ensure that everyone has correct information, as well as good examples of the kinds of things the YAC has funded, or in the case of new YACs, might fund.

....And while a lot of people aren't crazy about role playing, it's a really good way to get a feel for what you need to know and how well prepared you need to be when talking to people about supporting your YAC. And don't think of it as asking people for something - think of it as inviting people to be part of something important in their community.

As the Victoria Foundation says in their tag line: *"Connecting people who care, with causes that matter"*. Or as Dr. Seuss put it: *"Unless someone like you cares a whole awful lot, nothing is going to get better. It's not."* (The Lorax)

Additional Resources:

- Fund Development Readiness Checklist
- CFC Fund Development Planning Workbook
- CFC “Engaging Youth in Philanthropy” manual
- ImagineCanada website www.imaginecanada.ca





Developing the Plan

STEP 1 - Most fund development planning usually starts with identifying **financial goals**: How much does the YAC need to raise to support its grantmaking, leadership, and operational activities? In setting both short-term and long-term goals, there are many things to consider:

? How much do we need to cover our **operating costs** for the next year? How much do we already have available and from what sources? Are there activities beyond the next year that we should start budgeting for, such as a conference, an exchange with another YAC, a special leadership initiative....?

? how much income does the youth endowment fund now provide for **granting**? Will the parent community foundation be providing some additional funds for us to grant? Do we have access to any **flow-through funding** to grant with until our youth endowment fund generates enough income to meet our granting needs? Your Adult Advisor and/or community foundation board liaison will be able to provide you with this information. You may also want to think about whether additional granting funds may be required for special granting initiatives, such as a mini-grants program, or a pro-active grant to address an issue the YAC thinks is a priority in the community.

There are a number of ways that YACs can estimate how much they will need for short-term and long-term granting goals. If a community foundation's practice is to make 5% of the fund's income available for granting (its *disbursement policy*), consider that a \$100,000 endowment fund will only result in \$5000 to use for grants. Or on a \$50,000 endowment, there will only be \$2500 available. Although YACs know that small grants can make a big difference, it is not hard to see that working to build a substantial youth endowment fund is an important goal.

For established YACs that have already gone through several grant cycles, and are well known to potential applicants, a simple approach can be to look at how much money would be required to fund all the worthwhile applications received in a given year. For newer YACs, it may take awhile to become known and to start receiving the kind of requests that are a true indicator of youth issues and opportunities in your community. And as a YAC becomes more involved in community leadership, increased youth engagement in the community may result in even more opportunities for grantmaking.

This just reinforces that, when it comes to fund development, it's all about the grantmaking!





STEP 2 - To get everyone informed and engaged in the planning process, and start them thinking about identifying potential donors, it's helpful to think about what motivates people to give to charities and other causes. This will help you to identify reasons why people should support the YAC, and who the potential donors are in your community.

Start by brainstorming reasons why people donate. Think about the causes you have given to over the past year, and why you gave. Compare your list with information and statistics from the "Survey on Giving and Volunteerism" from Imagine Canada:

22.2 million Canadians (85% of the population aged 15 and over) made a financial donation in 2004, while 86% made an in-kind donation. Top motivations:

- ▶ Compassion towards people (94%)
- ▶ Belief in a cause (91%)
- ▶ Personally affected / connected with cause (69%)
- ▶ Owe something to community (58%)
- ▶ Religious beliefs (31%)
- ▶ Income tax credit (13%)

Then think about **why** people should give to the YAC. The list of reasons can be used to develop your **key messages**. The key messages are the most important facts and features to communicate about the YAC and the community foundation. Everyone in the YAC will need to know them, and they should be used in presentations, meetings with potential donors, print materials, your website, and press releases or any other media activities.

STEP 3 - The next step is to consider **who** could give to the YAC, by brainstorming potential donors in your community - this might be individuals, families, businesses, local government, foundations, service clubs, credit unions or co-ops. You might start with general suggestions, such as "pioneer families", "people of wealth" or "businesses that cater to youth". Then you can move on to specific individuals, businesses or organizations. Discuss what makes them good prospects, that is, why should they be interested? Then prioritize them. Your Adult Advisor or someone from the foundation's fund development committee should be able to tell you who in the community already supports the foundation, and if any existing donors have expressed an interest in the YAC. And remember: *it's really important to make sure that you communicate and coordinate all of your fund development plans with the foundation staff and fund development committee!*



STEP 4 - Once you have identified and prioritized potential donors, the next step is to consider how best to reach them. Consider:

- Do YAC or foundation board members have any personal connections?
- Would the potential donor attend an event?
- Would they be receptive to a request letter?
- For service clubs, foundations or government funders, do they have guidelines and an application process, and is there a deadline?
- Who are the most appropriate people to make a presentation?
- What kind of information and materials will be required?
- What is the timing involved?

Then prepare a task list that details your decisions on what activities you will undertake to reach your prospects, including who will do what, by when, and what preparation and material is needed for the activity. It might look something like this:

| Prospect | Activity | Responsibility | Timing | Preparation/materials |
|--|----------------------------|---|--------------------------------|---|
| Rotary Club | presentation | YAC co-chairs and Advisor | Rotary meeting 7:30 am Jan. 15 | Projector, grant photos, grant stories, foundation annual report, YAC brochure, request letter -meet week before to prepare and rehearse presentation, write request letter |
| Individuals identified by YAC and CF board members | Request letter | All YAC members, Advisor, foundation fund development committee chair | Sept-Oct. | Draft letter – get approval from fund development committee chair -prepare letters for mailing at October meeting |
| Existing foundation donors | Display at foundation gala | All YAC members | April 21 | Start planning at Feb. meeting; prepare display materials; update brochure; obtain photos from funded projects; confirm YAC members attending |

STEP 5 - You will also want to build **monitoring and evaluation** into your plan - keeping on track and measuring your success. It's a good idea to review your plan at every meeting and to check in to make sure that everyone is doing what they have committed to. Sometimes you might find that situations have developed that require you to make changes to your plan. For example, a new funding program might be announced by a local foundation that is a good fit for your YAC. Preparing an application might take priority over activities that are less time-sensitive. The important thing is to be flexible and see your plan as a work in progress that you can adjust and build on as opportunities arise.





Developing the Plan: Whistler's YAC shares their experience

Recently, the Community Foundation of Whistler's Youth Advisory Council got together to develop a plan for building their youth endowment fund. They started by talking about the kinds of charitable activities each of them had personally supported over the past few years:

- World Vision
- Terry Fox Run
- Relay for Life
- Pennies for Patients
- 30 Hour Famine
- Variety Telethon pledges
- Sponsoring children in developing countries
- Sales: cookies, daffodils, chocolates, poinsettias
- Sports teams: car washes, bottle drives
- Raffles; silent auctions
- Dinners - Global Awareness
 - Balding for Dollars
- Movie nights

Then they considered why they donated to these causes:

- Connection to the cause
- Belief in cause
- Affected by cause
- They were asked
- Faith; tithing
- Prizes
- Guilt
- Karma; happy-making

Next they brainstormed **why** people might want to give to the Youth Advisory Council of the Community Foundation of Whistler:

- It's a gift that keeps on giving
- It's youth to youth
- Youth know what youth need
- It helps youth
- Youth should have a say in their community
- They know about their community
- They can offer choice, variety, options to donors
- It's easy and convenient for donors
- They are accountable: they monitor grants and can provide reports; there is good financial administration; financial statements are available
- The community foundation has processes in place for donors and granting
- The funds stay in the community
- They will provide recognition to donors
- They can show by their grant stories that they are making a difference





Their next step was to identify **who** in their community might support them:

1. Business owners:
 - Big ones; eg. real estate
 - Who have kids
 - Whose businesses make money from youth
 - That are locally owned
 - That have connections to the community foundation
 - That are new to town
 - That are leaving town
2. people of wealth
3. community pioneers
4. people who have an interest in youth; are open-minded
5. people who care

Then their discussion focused on **how** they could reach these people:

- inviting them to grant presentation or celebration events
- sending solicitation letters
- hosting cultivation events

Once they had this framework, they would work with the community foundation's fund development committee to develop it into a detailed plan that includes specific prospects, activities, responsibilities, timing and the preparation required to get underway. They already had a regular donor in the Whistler Valley Trail Run, which gave them the funds raised from the annual trail run, so they had some experience in **donor relations** and knew that was also important to build into their plan. Their other fund development tips for YACs:

- ▶ Get connected in the community, build and maintain networks
- ▶ Build relationships with partners, prospects and donors
- ▶ Identify assets, prospects, opportunities
- ▶ Listen, learn, leverage, link
- ▶ Have a focused, simple, but detailed plan
- ▶ Be accountable - implement accountable, responsive processes; measure, demonstrate results
- ▶ Be a Passionate Ambassador! Tell stories
- ▶ Talk to donors about their charitable goals and interests
- ▶ Give donors information about needs and opportunities in the organization
- ▶ Bring donors on site visits to see the organization in action
- ▶ Invite donors to annual meetings, other events
- ▶ Monitor your progress, adjust as necessary, and celebrate your success!





Another Approach - A Challenge and a Goal

The Challenge to Hamilton Community Foundation's YAC - Fall 2007

At the Hamilton Community Foundation's Annual General Meeting in June of 2007, President and CEO, Carolyn Milne, issued a challenge to the Youth Advisory Council on behalf of the board: raise \$5000. to launch Youth-led Community Action Projects 2008. The incoming co-chair, Coby, immediately accepted the challenge with a big grin. The audience, awe-struck by YAC's willingness to take on this task - a new venture for them - reacted with cheers and applause.

Fall emerged and the task got more serious. Three YAC members volunteered for training on how they could accomplish this task. Fundraising events were out of the question - how would they go about finding \$5000?

The first workshop with our CEO gave the kids a background about the planning and preparation that they needed before asking potential donors for funds. As they worked through the methodology, you could see their enthusiasm growing. At the close of the workshop, each team member took responsibility for connecting with a specific potential donor and the first phone calls to set up appointments were made.

Then the homework and coordination started. Their plan involved several steps in the presentations they would make to each donor in person and the coordination of their efforts:

- Explain what YAC is.
- Tell why each of the three YAC members belongs to the group and their particular interests.
- Describe the previous Canadian Heritage sponsored program as well as the 2007 Youth-led Community Action Projects and the grant recipients.
- Discuss the challenge laid down by the board and why YAC is committed to carrying out the program.
- Explain how a gift from that donor would be an investment in the future of youth in Hamilton, and invite the donor to make a commitment.

The team met with the first potential donors who decided to support them but issued yet another challenge - their contribution would be based on doubling whatever else they could raise!

After meeting with several donors the YAC members were successful in their quest. They had learned much about how to go about having people support and invest in their efforts, skills that will stand them in good stead in the future.

And now Youth-led Community Action Projects 2008 will launch in January 2008!





Sample fund development solicitation letters

September 20th, 2003

Dear Friend of Vancouver Foundation;

"The greatest reward for doing is the opportunity to do more." -Jonas Salk

For the past sixty years, Vancouver Foundation has been dedicated to strengthening the community through financial support to charities. Vancouver Foundation's Youth Philanthropy Council supports youth-oriented programs through grants and volunteerism. The Youth Philanthropy Council, comprised of diverse youth from various backgrounds in Vancouver, has helped to improve the lives of many young people province-wide.

As members of the Youth Philanthropy Council, we believe our position in the community is one of opportunity and responsibility. Collectively, we do our best to ensure that funding is provided for highly beneficial programs that meet the needs of youth today. We strongly believe that by encouraging youth through funding their projects, we are helping find solutions to challenging issues.

Since 1998, the Youth Philanthropy Council has supported a wide variety of amazing projects that have benefited diverse groups of youth. For example, in 2002, we funded "The Take a Hike Youth at Risk Foundation" to purchase equipment for their alternate school program. Focusing on learning through outdoor education, the program has been very successful in helping students from challenging backgrounds to complete school, develop healthy behaviours and become contributing citizens.

To be selected for funding, grant applications are subject to an in-depth assessment process. Once funded, projects are monitored and reviewed to ensure they are completed and the funding is spent appropriately. The Council has supported projects dealing with a variety of significant issues, including environmental education, violence, volunteerism, leadership, social justice, and global awareness.

VFYPC has proudly supported many projects addressing youth issues and providing opportunities for youth to get involved in their community. It is only through the support and generosity of others, however, that youth philanthropy continues to grow. By contributing to Vancouver Foundation's Youth Philanthropy Council's endowment fund, you will help to ensure that this good work will continue to make a difference, now and forever.

Sincerely,

Vancouver Foundations' Youth Philanthropy Council

YOUTH IN PHILANTHROPY CANADA



www.yipcanada.org





Youth VIP Committee (Giving Youth a Voice in the Community)

date

«Contact_First_Name» «Contact_Last_Name»
«Address1»
«City», «Province»«Postal»

We are the Youth VIP (Voice in Philanthropy) Committee of the Community Foundation of the North Okanagan (CFNO). The Foundation is a registered charity that manages donated capital in perpetuity. The capital is invested to generate income that is then granted to charities within the North Okanagan Regional District. (Please see attached brochure for more information.)

The Youth VIP Committee is a newly founded component of the CFNO. We consist of a diverse network of youth, whose role is to give youth a voice in the distribution of funds to youth related projects. Our interest is to make positive long-term differences in our community. We believe that to ensure a strong community in the future, youth need to be supported now.

What do we do? We evaluate applications and then provide grants to youth focused projects, which we as youth think are most important. Furthermore, we have created a youth endowment fund that will ensure on-going support for youth in the community. In the past we have funded projects such as the 'Skate Jam 2002'. This project was sponsored by the Vernon Disability Resource Centre. It brought skateboarders together for a day of fun and competition. It was held at the Vernon Skateboard Park and provided an opportunity for youth to demonstrate their skills and expertise.

How can you help us help? By providing us with a financial contribution you will provide the community with a forever lasting legacy. Your tax deductible donation will be placed in a youth endowment fund, directed by the Board of Directors of the Foundation. In addition, matching funds will be provided by the Vancouver Foundation and the Community Foundation of the North Okanagan, which means for every dollar donated our fund will grow by \$4.00. Cheques should be made payable to the Community Foundation of the North Okanagan.

We will be contacting you by telephone in the near future to answer any of your questions and arrange a visit to give a short presentation if appropriate.

Sincerely,

Co-Chair
Youth VIP Committee
Web: www.cfno.org/youth

Co-Chair
Youth VIP Committee

CC: M.D. Armstrong - Executive Director, Community Foundation of the North Okanagan





Some good advice from a YAC that's done it

The Youth Advisory Committee of the Community Foundation of Greater Kingston has prepared an excellent YAC Training Manual, available on the YIP Canada website. It includes a section on fund development on pages 29-34, some of which is excerpted here, but make sure to check out the full Manual.

http://www.yipcanada.org/resource_docs/YACTrainingManualKingston.pdf

Remember that most YACs are committees of the community foundation, and as such, are representatives for the overall foundation. Therefore it is important that the initiatives of the YAC are in line with the goals of the overall foundation. In fund development, having an Advisor/Liason is often crucial. He or she can assist in finding appropriate donors, coordinating efforts, and help give moral support when approaching donors for the first time.

Relationship-building

- Cultivate relationships with potential donors
- Tell your story
- Ask about other partners
- Ask about potential donors
- Be sure that this is a coordinated effort and that there is communication between all people involved. There is nothing worse than asking the same company/organization/person twice! It is also important to coordinate with your community foundation's fund development plans.

- There are different methods of approaching potential donors:
 - o As a first step, a **letter** often works well
 - Create a generic donor letter. Much of the information from one letter can be used in the next, but be sure each letter is slightly individualized to reflect the research you have done. Showing you have interest in the company will cause them to take more interest in you.
 - o Alternatively, a **phone call** can also be useful
 - It may help to practice the phone call beforehand and rehearse what you want to say. It may even be useful to have a 'script' to ensure that all your information is accurate.
 - o The next step is to follow up with a **presentation**
 - Should be made by members of the YAC committee and accompanied by a board member or Advisor





- Should be no longer than 20 minutes
- Should be included in the presentation*:
 - What is the purpose of the Committee
 - What are the goals of the Committee for the future?
 - What is the age range of the Committee?
 - List the names of the members
 - How frequently the Committee meets
 - How many individuals, corporations and government organizations supported the Committee in the past (careful here - you don't want to violate the confidentiality agreement and jeopardize a donor's trust)
 - The committee's financial plans for the upcoming year
 - Examples of grants made by YAC
- After the presentation, a follow-up phone call is often helpful to see if they require any further information

Budgeting

- What will it cost to accomplish our goals?
- Make a list of the items we need and their cost. Consider in-kind contributions. For example, partner with a radio station to provide free air-time or a printing company to donate printing of programs, tickets or brochures.

Building a network

- Attend workshops, conferences, forums
- Keep in contact through e-mail or phone calls
- Tell everyone what we want to do
- Share successes
- Keep in mind that there is more than one way that businesses can contribute to YACs*.
 1. Money:
 - A business has several money-giving 'donors'
 - Donations program
 - Promotion and advertising budget
 - Individual donations from the owner and employees
 - Employee donations made by means of payroll deductions





- Employee associations and/or employee social and recreational clubs can donate funds. They can also organize fundraising events on your behalf
 - Unions can donate funds, especially if their members can benefit in some way from the donation (via the work of your group), or if there is some connection between their work and our organization's goals
2. People
 - Businesses and Unions can:
 - Lend a person to help by either giving their employee time off to volunteer for you, or have flexible work makeup arrangements for your staff
 - Contact someone who has recently retired, who still has contacts with the business or union, who may have time to help you
 3. Skills
 - Businesses and Unions possess an abundance of individuals with skills, for example, carpenters, plumbers, etc.
 4. Services
 - Anything from using an in-house print shop, graphic and design services, mailing machines, photocopiers, fax machine, or computer equipment, to borrowing equipment such as a truck, ladder, or bank of telephones
 5. Products
 - A business can provide a range of used products, and a business can also donate or sell, at cost, products that it manufactures
 6. Raw Materials
 - Businesses that manufacture or import raw materials can donate these free or at their cost. This category includes lumber and steel.

Celebrate!!

- Acknowledge those who helped us reach our goal
- Recognize the donors - Some ideas*:
 - o Write a personalized thank-you letter or note
 - o Use the donor's logo on publicity material, when the donor is not an individual
 - o Make them an honorary member, if appropriate
- Report back to our donors on progress
- Celebrate our success!!





Some Last Minute Tips:

1. Listen, Listen, LISTEN! Always be attentive before and after your presentation, as well as during.
2. Understand what the organizations' opinions and biases are. Try to adapt yourself to their mandate rather than having them adapt to yours. Ensuring that your scope encompasses the company's goals will encourage maximal participation from approached donors.
3. Promote interactive discussion between your donors and yourselves.
4. Try to keep your points to 3 minutes or less then invite comments or questions from your donors
5. Emphasize how your funds will benefit the community at large, not just your group
6. The right person can sometimes make all the difference
7. Donors often are captivated by those with similar interests. Try to match your presenter with the donor to the best of your ability.
8. Be encouraging, not pushy. Think of yourselves as... investment counselors!
9. Have fun and enjoy yourselves!

More learning from each other

Another great source of information is the **Council of Michigan Foundations**, whose Michigan Community Foundations' Youth Project has served as an inspiration for youth philanthropy everywhere. Their many excellent resources include a brief publication to help engage youth in community foundation development: "Youth Grantmakers Contribute to Community Foundation Growth" which is available on their website: www.youthgrantmakers.org/Documents/Youthcontributes

As the Youth in Philanthropy movement continues to grow, more promising practices will emerge, along with more tools, information and stories of successful fund development. We have gathered some of these stories from near and far; some very successful, and others that experienced challenges, but provided good learning opportunities. We would like to thank all who have shared their stories, and encourage others to do so as well. Following the stories, we have provided a simple questionnaire to outline your fund development experience, but feel free to submit it in any other format that will effectively communicate your story. We are constantly hearing of creative and effective YAC activity, and, knowing how much we can learn from each other, appreciate the opportunity to share it here.





Fund Development Stories From Around the World

Kingston, Ontario

The Community Foundation of Greater Kingston YAC raised \$10,000 through 'directed solicitation'. They targeted some specific people and it was promoted in the community foundation's "Ripples" newsletter. When they received donations that were undesignated, they would call the donor and suggest that they apply the money to the Youth Endowment Fund, because of its matching program. Most people said yes. One regular anonymous donor (who had made gifts to the funds matching program in previous years) gave \$3000 to this campaign. The 'match' is always a good selling point!

Hamilton, Ontario

Hamilton Community Foundation's YAC decided to approach Therese and Kent Newcomb, who have been long time supporters of the YAC, and provided the initial gift to its youth endowment fund. To prepare, 5 of the YAC members met after school before visiting the Newcombs at their home. In making the ask, YAC members presented a clear picture of what their goals were for the year, the activities they had been involved in over the past year to reach their goals, and an invitation for the Newcombs to participate. They also talked to them about partnering with them to share their story with other potential donors who may have an interest in supporting the work of the YAC.

Each member of the delegation had an assigned task to talk about one aspect of their activities to date. The YAC chair then made the "ask" for a specific amount that they felt the Newcomb's would be comfortable with. This amount was determined as a result of an ongoing relationship with the potential donor and their knowledge of the donors' interests. YAC members believe the key to the "ask" was this relationship and knowledge. In response to the meeting, the Newcombs generously donated \$4,000. Some of their donation was to enable a fourth member of the YAC to attend the national conference, but the bulk of it, approximately \$3,400, was for granting.





Golden, B.C.

"This class has left behind a legacy to be proud of."

Georgia Santucci, Golden Youth Opportunity Council

The town of Golden is located close to four of Canada's most famous National Parks, in the north end of the Columbia Valley, nestled between the Canadian Rockies in the east and the Purcell Mountains to the west. The town has a population of approximately 8000 people and is surrounded by the Columbia Valley Wetlands and two great rivers: the Columbia and the Kicking Horse.

The Golden Youth Opportunity Council was conceived in 2003 as a result of the efforts of the entire graduating class of Golden Secondary School. The graduating class raised funds for their graduation ceremonies by making and selling apple pies, putting on school dances and a number of other social events. After calculating their expenses, they had \$2500 still remaining and they wanted to do something worthwhile with the money.

With help from their teacher sponsor, and through their work in leadership class, the grad class took their \$2500 and used it to leverage an additional \$2500 from the Columbia Shuswap Regional Electoral Area Grants-in-Aid program. They then leveraged those funds through a successful application to the Columbia Basin Trust Community Initiatives Fund for a further \$5000, bringing their total to \$10,000. Committing these funds towards a youth endowment fund and the start of a Youth Advisory Council with the Golden Community Foundation made them eligible for a \$5000 match from Vancouver Foundation's Youth Philanthropy Program. This brought their endowment fund up to \$15,000.

The fundraising took approximately seven months starting in September 2002 and then both applications took another couple of months to complete and have processed. Support from the graduating class, community, government decision makers and the Golden & District Community Foundation to manage the fund was necessary in order for the concept to happen.

In addition to the creation of The Golden Youth Opportunity Council, the activity was acknowledged in the newspaper and an immense sense of pride manifested among the 2003 graduating class. The youth have also set a wonderful example for other graduating classes and youth in general in the community and created a fund development legacy for future graduating classes to follow.





Salmon Arm, B.C.

"The aim is to create a new generation of philanthropists by showing them, first hand, the good it can do for communities." Cindy Derkaz, Shuswap Community Foundation

The Shuswap Community Foundation serves a community of close to 50,000 people in the Columbia Shuswap Regional District in the north end of the beautiful Kootenay and Okanagan valleys in British Columbia, Canada. The internationally renowned Shuswap Lake System dominates the area of deciduous, evergreen and rain forests and provides 400km of shoreline adventure for tourists. Shuswap Lake is named after the Shuswap Indians, an Interior Salish tribe, and is home to many artists, craftspeople and authors.

The Youth Advisory Committee of the Shuswap (YACOS) was fortunate to have been supported by the local Credit Union in the creation of a Salmon Arm Savings and Credit Union Youth Endowment Fund in September 2002. The Board of the Shuswap Community Foundation created a proposal and approached the Salmon Arm Savings and Credit Union, knowing that the Credit Union was looking for a way to support youth in the community.

The commitment from the Credit Union was an initial \$4000 with an additional \$4000 in each of the following two years. This enabled the YACOS to qualify for a matching grant program with Vancouver Foundation. In addition to establishing the Endowment Fund, the Credit Union recognized there would not be sufficient income from the fund to make a significant grant early on, so they provided an additional \$1500 in flow through funds to be granted in their first year.

The YACOS followed up by planning a "lunch" at the Credit Union. A giant "hand" mural was created out of donated materials from REVY Canada, depicting positive youth activities in the community that the YACOS wanted to support. The "hand" was unveiled at a photo-op in the lobby of the credit union and remained on display for a week. All of this created substantial publicity around the youth in philanthropy program with coverage in the local newspaper and the Credit Union newsletter.

The total amount added to their YAC fund as a result was \$13,500 from the Credit Union, plus \$6000 from Vancouver Foundation as well as \$6000 for granting over the next three years from Vancouver Foundation. The Credit Union also "topped-up" the money for granting in the second year.

As well as deciding which projects receive funding, the youth committee must also raise money for the endowed fund, so that gifts can be made from interest the fund earns. Eventually, they hope to be able to distribute up to \$25,000 or more a year to charitable projects benefiting youth in the Shuswap. "The aim is to create a new generation of philanthropists by showing them first hand the good it can do for communities," says Cindy Derkaz, President of the Shuswap Community Foundation. If they were to do this again, she continues, "the YACOS would be involved in the approach, including a written and personal presentation to the potential donor. It could be a very valuable experience for both the YACOS and the potential donor; we can all learn to communicate better."



Melbourne, Australia

"We wish to further a society that values community and family based on compassion, trust, loyalty, truth, respect and honesty with equality of opportunity and rights for young women."
-Foundation Mission Statement

Nestled on the banks of the Yarra River, east of Melbourne in Victoria, Australia, sits the Melbourne Girls' College. Established in 1994, the school caters to roughly 1150 grade seven through twelve students, and places special emphasis on science, technology and leadership. From a state-of the art complex to house the Arts, Media and Physical Education programs, to the future development of a boatshed on the river, the college is committed to live up to their motto "where girls lead and achieve."

The Melbourne Girls' College Student Foundation is an independent fund initiated and organized in 2001 by the students at Melbourne Girls' College. It was decided that to encourage the development of all aspects of philanthropy, the students would develop their own logo, application paperwork, criteria for assessment of applications and advertising material. The Student Leadership Executive runs the Foundation, with the assistance of the Funding Allocation committee and the SRC, who take responsibility for fund-raising.

Initial funds of \$4000 were raised by the SRC by doing things such as casual clothing days and selling chocolates. A \$500 donation from the Myer Foundation and a \$4000 matching grant provided by the Council for the Encouragement of Philanthropy in Australia helped to raise their total. Two grants of \$750 are offered each year.

The first grant was given to a project submitted by the Brosnan Centre called 'Cookin's Cool,' where the funding was used to buy a barbeque to develop both cooking and socialization skills for youth recently discharged from correctional institutions. The second grant went to Grassmere Youth Services for a project called 'Girl Power,' a 10 week course for girls with severe emotional and personal problems. In both cases students from the college were involved in the evaluation of the projects.

The Melbourne Girls' College Student Foundation is grateful for the knowledge, time and advice that the Melbourne Community Foundation, Education Foundation and the Stegley Foundation, have generously offered on many occasions. The Foundation truly believes that "**Everyone** can make a difference - **You** can make a difference too!" and encourages others to make that first step.





Mini Cassia, Idaho

"When given the chance young people can do amazing things. They are creative and full of life. Young people are always looking for the chance to help out in any way possible"

Sara Bott, Mini Cassia HealthNet Youth Action Council

The Mini Cassia Health Net Youth Action Council in Idaho serves a population of about 40,000 people. They have approximately 40 youth in their Youth Advisory Committee and are able to grant \$9000 each year.

There are two events that proved success for them in 2001 and 2002. With only two months planning, "Spook Alley" in October successfully supported their "Shop with a YAC" in December 2001. A building was donated to use for the event, materials were purchased (out of their own pockets), local youth were recruited and "Spook Alley" was created for two weeks of Halloween festivities in the community. The total added to their YAC fund was \$1500.

But instead of keeping the money and using it for themselves, the Mini Cassia Health Net Youth Action Council gave the money back to the community with their "Shop with a YAC" day and gave area youth and community members a Christmas they might not have had. They also helped a Local Helping Hands Mission in Christmas of 2002 where they worked on a "Blankets for Buddies Bedding Drive" and again were able to see first hand the positive impact they had on their communities.

When asked what the most rewarding and memorable part of their activities were, they replied, "the youth felt like they accomplished what they set out to do. They felt great giving back to the community and making a difference in the life of younger children." The Mini Cassia Health Net Youth Action Council would do it all again in a heartbeat and intend to. The only thing they would want to improve upon would be to serve more community members.





Calgary, Alberta

"Providing youth with an opportunity to create positive change in their community."

The Calgary Youth Foundation was launched in 1995 with seed funding from the Calgary Foundation, as an initiative of Child and Youth Friendly Calgary (CYFC). CYFC was created in 1992 based on the belief that young people who experience being a contributing member of society will become adults who have a sense of ownership and responsibility to their community. The Child and Youth Friendly City concept is spreading and CYFC has assisted many cities around the world in developing their own youth-inclusive initiatives. Serving a population of over one million people, Child and Youth Friendly Calgary provides the opportunity for youth to volunteer, serve on boards of directors, voice their opinions to business leaders and politicians, learn about diversity of their community, serve on a youth foundation and learn citizenship, not to mention help to raise self esteem in the youth.

The Calgary Youth Foundation is one of the many programs CYFC has developed to inspire youth to take an active role in their community, raise awareness among youth about the resources in the community, and raise awareness in the community about the abilities of youth. The Foundation is made up of 9 members, aged 13-18, representing Calgary's diverse youth population. The youth meet twice a month to discuss fundraising activities, promotion ideas and grant making. They send out grant applications and then select youth driven "grassroots" projects to receive grants of up to \$1,500. All granting decisions are made by the Foundation members; adult involvement is strictly advisory. They go through an interview process with each grant applicant. They have roughly \$6,500 in their endowment and much of their granting is flow-through.

In the spring of 2001 the Calgary Youth Foundation began preparation for the creation of a 'Rock for Peace' music CD. They put out a call to local Calgary youth artists to create original music based on the theme of peace. A compilation of 12 songs were selected and recorded at Two Smiles Music, a professional recording studio, which donated free studio time and a professional producer. The Youth Foundation members burned, packaged and sold the CD at various locations and events and on their website (for \$10) and also held a CD release party, which was fun and helped in publicity.

The project took one year to complete; approximately 25 people were involved and generated just over \$1000. Other benefits which resulted from the activity: the honing of leadership skills; publicity for the Calgary Youth Foundation and CYFC; it gave local artists a chance to record; and gave opportunity for everyone to work together to promote peace. In the future, if they decide to do this type of project again, they would delegate more of the production of the CD to a professional company, advertise and sell at more events and they would like to have some money to start with.

To value youth in society and ask them to take on more responsibility, they need to be included in all aspects of community life. Through its efforts, Calgary Youth Foundation and CYFC hopes to build for youth a world where young minds can be challenged, heard, and valued so that they, in turn, can make that world even better.





Queensland, Australia

Just an hour's drive from Brisbane in Queensland Australia, in the small picturesque town of Boonah, high school students are helping to keep their town alive with a vision, teamwork and determination. Their goal: to build a cottage in three days and sell it to raise funds for an endowment fund that would help with training and business ventures for future generations of youth.

Historically, about 90% of high school students leave Boonah for school or work opportunities elsewhere, which makes engaging youth in community building a challenge, (and therefore the future of Boonah questionable). Michael, the team leader of the project says, "We say young people are our future, but by the time we try to engage them in our communities, they have already left." The goal is to show every rural community losing their youth to the big cities, that they can do something like this to engage young people before they leave, and create incentive for them to stay.

As word got out about the project, other kids from other Australian towns came to take part to learn and bring back ideas to their respective communities. Students learned valuable skills about getting started, managing a group, teamwork, and equally as important, met up with like minded youth to network with.

With the help of the town builder, the group of forty untrained students built a two-bedroom cottage in seventy-two hours. They took part in all aspects of the construction from buying ladders, to building the frame and installing the electrical. The cottage did not take long to sell, as the local school showed immediate interest and ended up buying it for \$25,000 as soon as it was finished. On a whim, the students invited the Prime Minister of Australia to show him what they had done. What a boost for the students to see the support on their project from the Prime Minister, who not only officially opened the building, but also committed to matching the funds raised!

Throughout, the construction of the cottage, student involvement and the grand opening was filmed and then broadcast on television. This was fantastic exposure for the project, and the endowment fund, not to mention a well-deserved moment of recognition for the students responsible. This visionary idea proved to be a great community building exercise for the town of Boonah and the community hopes this example motivates other youth to think of ways to positively engage in their own communities and leave a legacy to be proud of.





Revelstoke, B.C.

Revelstoke, which started out as an old mining and logging town, is nestled between the Selkirk and Monashee Mountains in the Columbia Valley of British Columbia. It is well known today for its spectacular mountain terrain and wildlife that entices both summer and winter outdoor enthusiasts. The Revelstoke Community Foundation serves a community of approximately 8000 people.

Five members of the Youth Advisory Committee (YAC) of the Foundation, who are also known as, "Young Philanthropists Liking all Youth" (YPLAY), were instrumental in adding \$1340.00 to their youth endowment fund in 2002 and \$415.00 in 2003.

In the spring of 2002, Revelstoke Builders Home Hardware owners Gerry and Barry Ozero approached the Foundation about the idea of them hosting a painting and decorating show with the proceeds going to YPLAY. The results: over 600 people attended the show which resulted in a donation of \$1340.00. Committee member Ashley Rohde accepted the cheque, on stage in front of an audience and officially introduced YPLAY to the community, which helped to put them in the public eye. YPLAY is very grateful for the generosity of their local Home Hardware store. The Home Hardware Corporation sponsors events like these, so it may be a likely option in your community.

In April of 2003, Foundation Board member and owner of Pharmasave, Steven Hui, arranged for YPLAY members to fill and sell bags of topsoil on the same day that Pharmasave was having a sidewalk sale. Revelstoke Equipment Rentals donated and delivered a load of topsoil to the parking lot and Pharmasave donated the bags. A load of topsoil and five hours later, YPLAY had made \$415.00 and had spent a full day connecting with the community.

The best part of this event says Debby Robinson, Adult Advisor for YPLAY, is "providing something for a donation rather than just receiving a donation." She continues, "it was also a great way for the community to see the connection between the Foundation and YPLAY." They would definitely do this event again, but would make sure to have pamphlets available for the community.





Charlotte County, New Brunswick

Charlotte County is located in the Bay of Fundy area along the southern part of the largest of Canada's three Maritime provinces, New Brunswick. Warm sandy beaches along the Gulf of St. Lawrence line the north east coast of New Brunswick while to the east, there is the 15 mile wide Isthmus of Chignecto which links New Brunswick to Nova Scotia. The Bay of Fundy is one of the Marine Wonders of the World where tides rise and fall over 50 feet daily, and have carved an impressive shoreline including the famous Flowerpot Rocks. The world-famous Confederation Bridge also connects New Brunswick to Prince Edward Island.

Fundy Community Foundation was incorporated in 1993, and started the first Youth In Philanthropy Program (YIP) in Atlantic Canada in 2001. FCF put out a letter to all middle and high schools in Charlotte County inviting school principals to appoint students to join a Youth Advisory Committee to the FCF Board of Directors. The youth are responsible for making grants in support of charitable work in Charlotte County, which has approximately 30,000 people. The seven members of the YAC call themselves TIP (Teens in Philanthropy), have approximately \$2500 in their Youth Endowment Fund and once the fund reaches the minimum level of \$5,000, income from the fund will be available for TIP members, now and in the future expect to make grants of about \$3000 per year to the communities of Charlotte County.

On November 15, 2003 TIP performed a skit called "A Community Idol," a spoof based on the hit TV show "An American Idol." The eight-minute skit was performed during the Fundy Community Foundation's 10th Anniversary Gala. The Gala, where the Thomists also performed (a 20 member Big Band style dance orchestra) was a sell out event to 300 people. The humorous performance was successful in raising \$1625 in donations that night, plus an additional \$800 which came in over the following few days, for a total of \$2500 to open the first FCF Youth in Philanthropy Endowment Fund.

In the skit, judges were modeled after the characters on the TV show, but the contestants, instead of having a 'talent' contest, competed for grant applications. The applications from the contestants were funny, but accurate in the criteria required for eligibility for funding, such as demonstrating volunteer commitment, community interest, partnerships, root cause of community issue, etc. An extension on a community outhouse got the judges' attention; the whole community was going to pitch in to do the work, locals had donated materials and Grandpa had already sold lots of moonshine to raise some money, but they just needed some more funding....





In the end, the judges discussed the merits of all the applications and decided they were all worthy projects and so all would be funded. But at the last minute the show host received a cell phone call with the bad news that the network was bankrupt and there was no funding to award. What to do? One of the judges suggested starting up an endowment fund with the Fundy Community Foundation. The other judges weren't sure where the money would come from, but the first judge explained that it would come from the community, of course! ---He gestured to the audience, who by then was starting to realize what was going to happen next--. There were some lighthearted jokes "Can they afford to give?" "They sure look like they can!"... and then the contestants came out from behind the curtain with huge oversized collection buckets, and the cast broke into a song, "If you are happy and you know it give to TIP" - The whole audience clapped along, and the collection began for our first Youth Endowment Fund.

Just before the skit, the adult advisor gave a short introduction about the Youth In Philanthropy program, highlighting some of their success stories. This lent credence to the YAC members, and got the audience primed for what they were going to do.

The YAC members spent about 10 hours total to create the performance. They met several times to write the original script and then twice before the performance to rehearse it. The only resources needed were some props that YAC members brought from home. Leslie Cuthbertson, Executive Director of FCF comments "The whole activity raised the profile of the YIP program from only a very few people having heard of it to a whole community being blown away by it!" The activity also received coverage in the local paper.

They would definitely do it again and comment, "a skit is a fun way to show off the creativity of the YAC members and shed a positive light on what philanthropy is all about." When asked what they might have done differently, the adult supervisor responded, "To have the YAC members take their time collecting after making the ask. They were a little shy about it and did not want to stay too long at any one table." Plus, she adds, "I, as the adult advisor, might have taken the microphone while they were collecting and explained some giving options other than just cash from the wallet." She continues "People wanted to give - they just needed the opportunity."





Whanganui, New Zealand

In early 2003 the Youth Grant Making Committee of the Whanganui Community Foundation met to consider what they would do in 2003. There was a sense of disenchantment with their previous grant making and the impact on the youth community. A process was begun to consider what the youth wanted to achieve. As a result the committee came up with three objectives:

1. To raise the profile of youth culture in the community.
2. To provide for those youth who are often "left out".
3. To build bridges between different groups of youth in the community.

To do this, the group decided that rather than grant making they wanted to organize a Hip Hop Festival. This involved workshops during the day such as Graffiti Art, Break Dancing, MCing and DJing, an open air concert and displays of break dancing, skate boarding and other elements of youth culture in the centre of the city during the day and a concert in the evening.

Hip Hop was chosen because of its appeal to a number of groups of youth and the range of activities associated with Hip Hop culture that would allow many youth to be involved. Underpinning Hip Hop is a culture of respecting people and their space and establishing status through skill. It has been used extensively overseas as a tool in working with youth gangs.

The planning process involved several adults who acted as informal mentors. An events organizer was also employed to put ideas into practice. As planning went on, several people joined the meetings and by the end of the process there was an amazing group of people from all walks of life around the table. Bonds were forged and a new appreciation of each other was gained. Youth learned a number of useful skills. The Youth took responsibility for arranging sponsorship, including a presentation to the Local District Council, and for determining the shape of the day.

The Festival was an overwhelming success with participation well beyond expectations. Young people came from throughout the region. The open air concert was a huge success with people of all ages attending. The participation of Youth Aid police officers, in civilian clothing, helped to break down barriers and stereotypes. The sight of police officers enjoying themselves with "at risk youth" was wonderful.

The Whanganui Community Foundation is very proud of its youth committee. The event was much more work than grant making but ultimately the rewards were also much greater and the young people involved gained considerably from the process.

**Sechelt, B.C.****Sunshine Coast Community Foundation****Youth SCOOP (Youth Sunshine Coast Organization of Philanthropy)****Size of population served by YAC: 28,000****# of YAC members: 12****Youth Endowment Fund: \$21,000****Average amount granted each year: \$1000****What fund development activity was successful for your YAC?**

Our YAC is only three years old and so far, the parent SCCF Board has initiated all the fund development activity. In the first year the Foundation secured a \$5000 gift from our local cable company, Coast Cable. This was matched by the YAC matching grant program of the Vancouver Foundation. In the second year, the Foundation added \$4000 from an undesignated gift of securities and the Vancouver Foundation also matched this. Once again this year the Foundation has added \$3000 from an undesignated gift and has applied for the final \$3000 match from the Vancouver Foundation. Once received, the "Youth Legacy Fund" will show principle of \$24,000.

Did the activity result in publicity for your YAC and/or community foundation?

The initial gift from Coast Cable coincided with the launch of Youth SCOOP and was reported in an article in our local weekly newspaper. Last year the YAC concentrated its efforts on granting making with the Foundation adding \$1500 to it's granting total. This activity received a write up in our local weekly newspaper on two separate occasions.

Future fund development.

Now that we have successfully achieved the final Vancouver Foundation matching grant, our YAC will be concentrating on developing their own fund development activities. The first is now being planned and will take place early in the new year.





Grand Rapids, Michigan

Youth Grant Committee - Grand Rapids Community Foundation

Youth Endowment Fund: \$1.6 M Average amount granted each year: \$70,000

What fund development activity was successful for your YAC?

Soliciting gifts from individuals known to YGC members

What steps did your YAC take to make it happen?

1. Developed a case statement: You should support the YGC because it provides funding for programs that address youth needs while teaching youth about philanthropy, leadership, and responsibility.
2. Identified prospects: brainstormed ideas about who might support the Youth Fund; from that list narrowed it down to a few key populations to target; committee members brought in names/addresses.
3. Drafted a gift request letter: used samples from other funds held at the foundation, got approval from the GRCF president for both letter and list of recipients.
4. Sent out letter: Some committee members jotted personal notes on letters.
5. Acknowledged gifts: in addition to the typical foundation thank you letter, committee members all signed a thank you card to donors. Also, committee co-chairs phoned donors to thank them. Donors who gave large gifts were invited to the year-end dinner.

How many people were involved? Full committee.

When did it happen? Began the process in Fall 2001, worked on it throughout that school year. Now that a process is in place, we try to do it every year (ID new prospects, revise letter, etc.).

How much time did it take? Initially, we spent a significant amount of time at three monthly meetings...about 45 minutes at three meetings. In subsequent years, the process is reviewed for newer members, and the only time spent is to gather new prospect information and updating the letter.

What did you need to make it happen? Eg. money, equipment, brochure, materials...

The GRCF's donor relations director helped to facilitate the process initially. This year, the YGC is expanding to do some donor calls as well as letters. They will be sharing the YGC brochure with the prospect during the donor call.





Fremont, Michigan

Fremont Area Community Foundation Youth Advisory Council

Size of population served by YAC: 3,500 **# of YAC members:** 20
Youth Endowment Fund: \$1.2 million

Average amount granted each year: \$60,000

What fund development activity was successful for your YAC?

We tried an open house this year and invited community members in to go through stations that were manned by YACers. That event raised \$275. Last year we made a presentation to board members and that raised over \$1,000.

What steps did your YAC take to make it happen?

For the open house, we wrote an invitation letter. Gathered names and addresses of community leaders and friends of parents. Plan out each station. Made refreshments. Set up. Welcomed people to the event. Made the presentations, asked for their support, and thanked them for coming.

How many people were involved? 20 YACers and about 8 attendees.

When did it happen? January 25th 2004

How much time did it take?

The event was 1.5 hours. The planning took another 3-4 hours.

What did you need to make it happen?

Creativity. Very little money. Fund cards, brochures, refreshments, name tags, photos of activities.

How much money was added to your YAC fund as a result? \$275, but we're hoping to send a follow up letter requesting contributions.

Were there other benefits that resulted from the fund development activity?

YAC members gained experience and confidence in making presentations and pulling off an event.





Cadillac, Michigan

Cadillac & Kellogg For Youth - Cadillac Area Community Foundation

Size of population served by YAC: 25,000 # of YAC members: 19

Youth Endowment Fund: \$1,100,000

Average amount granted each year: \$30,000

What fund development activity was successful for your YAC?

Very limited success having youth solicit \$2,000 gifts from tax exempted individuals

What steps did your YAC take to make it happen?

Training from the Council of Michigan Foundations

2 internal training sessions

Each youth contacts one donor for an appointment and takes a 2nd youth for back-up

How many people were involved? 6

When did it happen? 2003

How much time did it take? About 5 hours of training and another 5 hours preparing materials

What did you need to make it happen?

Brochure from foundation, list of current and past grants, tax calculations, solicitation list from board, list of current and past members and response cards

How much money was added to your YAC fund as a result? \$5,000

Endowed in community foundation general fund - \$800

Endowed in YAC fund \$1,600

Pass through funds \$2,600

Were there other benefits that resulted from the fund development activity?

We found out which youth could do it and which could not

Did the activity result in publicity for your YAC and/or community foundation?

No





Share Your Fund Development Success Story

Name of YAC:

Community Foundation:

Location:

Size of population served by YAC:

of YAC members:

\$ in Youth Endowment Fund:

Average amount granted each year:

What fund development activity was successful for your YAC?

What steps did your YAC take to make it happen?

How many people were involved?

When did it happen?

How much time did it take?

What did you need to make it happen? Eg. money, equipment, brochure, materials...

How much money was added to your YAC fund as a result?

Was it for flow-through granting, a youth endowment fund, or YAC operating costs?

Were there other benefits that resulted from the fund development activity?

Did the activity result in publicity for your YAC and/or community foundation?

Would you do it again?

If so, are there things you would do different?

Would you recommend it to other YACs?

Thank you for your story!

Please email to boates@cfc-fcc.ca

YOUTH IN PHILANTHROPY CANADA



www.yipcanada.org





Glossary

Philanthropy

Philanthropy is defined in different ways. The origin of the word philanthropy is Greek and means love for mankind. Today, philanthropy includes the concept of voluntary giving by an individual or group to promote the common good. ...

Community Foundation

Locally-run public foundations build and manage endowment funds to support charitable activities in their area. Each community foundation is autonomous and governed by a volunteer board of local leaders.

Fund Development

A program of marketing, cultivation and solicitation activities to attract capital, operating and flow-through (temporary) funds.

Donor

A person, corporation, foundation, or other organization that makes a gift

Stewardship

The process by which a charitable institution acknowledges gifts, recognizes donors, honours donor intent, and invests and uses gifts prudently. It also conveys the sense of ongoing “nurturing” of the donor relationship over time

TYPES OF FUNDS

Administrative/Operating Endowment

A permanently endowed fund providing a source of investment income designated to offset operating costs.

Agency Endowments

Funds established by charitable organizations as permanent funds to ensure an ongoing source of support for their programs and operations. They are held by the foundation as designated funds.

Community Fund

A term often used to describe the community foundation’s general unrestricted permanent endowment fund. Contributions received without designation are generally placed in this fund. Some community foundations set up named sub-funds of their Community Fund in order to recognize generous donors.

Designated/Donor Directed Fund

Funds given to support particular agencies or organizations, selected by the donor at the time of gift.

Discretionary/Unrestricted Funds

Funds given for general charitable purposes, enabling the foundation to respond to a broad range of community needs and opportunities; often referred to as the “Community Fund”.





Donor Advised Fund

Funds enabling donor participation in the distribution of income (and sometimes principal) from their fund. While the donor's advice on grants is welcomed and generally followed, by law, the Board is not bound by it. Many community foundations have a policy that such funds become unrestricted upon the death of the donor or at some agreed-upon time.

Endowment/Endowed/Capital Funds

Funds held as permanent capital and invested for the purpose of generating income for distribution.

Field-of-interest Funds

Funds established by the community foundation to attract contributions for a particular area, e.g. children, education, the arts, or a geographic location, without limitation to a specific organization or beneficiary.

Flow-through/Temporary Funds

Non-permanent funds received for distribution over a period of time, often for grantmaking or special projects.

Managed Fund

Non-component funds entrusted by other charitable organizations to the foundation for administrative purposes only.

Memorial/Tribute Fund

A permanent endowment fund established in memory or honour of an individual or family, or in recognition of an event; it can be funded by one or many contributors. See also Named Funds. (Small memorial contributions received in response to obituary notices are generally added to the unrestricted fund or placed in the operating fund.)

Named Fund

Fund established by, or named for, an individual, family, corporation or other group to carry out the charitable interests of the donor(s) or deceased/honoree.

Open/Closed Funds

Open Funds can be any fund within your community foundation to which any donor may contribute to. Closed Funds are any funds to which only designated donors may contribute.

Operating/Administrative Fund

Donations and investment revenue used to offset the foundation's operating costs.

Project Fund

Permanent or flow-through fund set up to receive contributions for support of a particular project, e.g. disaster fund, renovation fund, early grantmaking fund.

Restricted Fund

Funds established by donors to support particular areas of personal interest, e.g., the performing arts, child welfare. The Board allocates the income to appropriate recipients within the defined category(ies).





Scholarship/Bursary Funds

Permanent endowment funds set up to support educational costs of deserving students selected by a committee of independent persons and based on fair and legitimate eligibility criteria suggested by the donor. Scholarship funds usually call for high academic performance while bursary funds concentrate on financial need and satisfactory academic progress. These funds can become labour intensive.

TYPES OF GIFTS:

Planned Giving/Gift Planning

The process of designing charitable gifts that enable donors to realize their philanthropic objectives while considering tax and other financial benefits.

Planned Gifts

Charitable donations usually made from assets (wealth) rather than from current income. They may be received immediately (present gift) or at a later time (deferred gift). They usually involve a legal instrument, e.g. will, insurance policy, deed of gift, trust agreement.

Bequest

A provision in a will instructing executors to distribute a certain amount, a percentage or residue of the estate to one or more charities.

Deferred Gifts

An asset/gift to be transferred later, often upon the donor's death.

Gift Expectancy

A deferred gift that a donor has advised the community foundation of through correspondence or a gift/pledge form.

Gifts-in-Kind

Real estate, securities, or personal property. Appreciated marketable securities qualify for a reduction in realized capital gain if listed on a prescribed exchange.

Outright

The donor retains no interest in the gift; it is immediately available to the foundation, e.g. cash.

Revocable

The donor may change his/her mind about the gift; however, it is likely - but not guaranteed - that with good stewardship the foundation will receive the gift, e.g. bequest in a will.

PROFESSIONAL ADVISORS:

Professional advisors are indispensable to community foundations for they are in a position to advise both the community foundation and clients on various aspects of estate and financial / tax planning. Systematic and well planned efforts to inform professional advisors in your community about the community foundation and planned giving options will increase the likelihood of referrals and gifts from clients.





A final note....

When undertaking fund development activities, it is important to ensure that policies and practices are respectful and ethical. YACs should be aware of their community foundation's Code of Ethics, values and relevant policies, such as those concerned with confidentiality, privacy, and donor recognition. The Code of Ethics of the Association of Fundraising Professionals is also helpful to look at, and although it is specific to fund raising professionals, it includes a lot of good direction for anyone involved in fund development.

Association of Fundraising Professionals Code of Ethics

The Association of Fundraising Professionals Codes of Ethical Principles and Standards of Professional Practice:

1. Members shall not engage in activities that harm the members' organization, clients or profession.
2. Members shall not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations or their clients.
3. Members shall effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. Members shall not exploit any relationship with a donor, prospect, volunteer, or employee for the benefit of the member or the member's organization.
5. Members shall comply with all applicable local, state, provincial, and federal civil and criminal laws.
6. Members recognize their individual boundaries of competence and are forthcoming and truthful about their professional experience and qualifications.
7. Members shall take care to ensure that all solicitation materials are accurate and correctly reflect their organization's mission and use of solicited funds.
8. Members shall take care to ensure that all donors receive informed, accurate and ethical advice about the value and tax implications of potential gifts.
9. Members shall take care to ensure that contributions are used in accordance with donors' intentions.





10. Members shall take care to ensure that proper stewardship of charitable contributions, including timely reports on the use and management of funds.

11. Members shall obtain explicit consent by the donor before altering the conditions of a gift.

12. Members shall not disclose privileged or confidential information to unauthorized parties.

13. Members shall adhere to the principal that all donor and prospect information, created by, or on behalf of, an organization is the property of that organization and shall not be transferred or utilized except on behalf of that organization.

14. Members shall give donors the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.

15. Members shall, when stating fundraising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the American Institute of Certified Public Accountants (AICPA)* for the type of organization involved.

*in countries out side the United States, comparable authority shall be utilized.

16. Members shall not accept compensation that is based on a percentage of charitable contributions; nor shall they accept finders fees.*

*Refer to AFP's professional Compensation Position Paper

17. Members may accept performance based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices with in the members' own organizations, and are not based on a percentage of charitable contributions raised.

18. Members shall not pay finder's fees, or commissions or percentage compensation, based on charitable contributions, and shall take care to discourage their organizations from making such payments.

