From: Christine Peringer, Fundraising Committee Chair

To: Joellen McHard (and eventually the new Fundraising Committee Chair)

Date: January 21, 2021

Re: Fundraising Committee (FC) Chair Handover Note

Hi Joellen,

This memo contains the following:

1. Responsibilities of the Fundraising Chair
2. Overview of what LCCJ does in fundraising – recent past and desired future
3. Key Documents
4. Free information sources online
5. Things to do ASAP re fundraising < I think you are on top of all of these, but listed just in case
6. Final Note to the Fundraising Chair

I hope this is helpful and look forward to filling in any gaps you may identify. I look forward to speaking with the incoming fundraising chair when they are identified,

Christine

1. **Responsibilities of the Fundraising Committee Chair**
2. **Fundraising Committee Meetings**
	1. Draft agenda, chair and take minutes/record of decisions for meetings. Make sure a next meeting is scheduled. The next meeting is planned for Tuesday February 9th at 10:30 am – 12 Noon
	2. Membership - Lead in identifying/filling gaps in the FC membership. Currently, only Joellen and Brian Peters are on the committee, so a chair and 1-2 other members would be great.
3. **Oversee subcommittee activities**
We have a decentralized model where groups of people come together for specific tasks when needed, without being burdened with extra meetings. If these don’t self-start, as Fundraising Chair I check in with them.
Currently we have two such groups:
	1. Polar Bear Plunge Committee – Led by Alfred von Mirbach
	2. Golf Tournament – Sue Landry has been a stable group lead for the last 2 years – need to check in with Sue in Feb/March 2021 to see if she is OK to lead again in 2021

Other groups could develop e.g. post-covid a Dinner Fundraiser, fundraising concerts etc.

1. **Monitor/Update the shared documents with fundraising information** that house our fundraising information (using Google sheets). See list below under “Key Documents”
2. **Liaise with Joellen** every few weeks to consider opportunities, next steps etc.
3. **Other Specific Tasks I took on:**
I have done some specific activities myself, but they don’t need to be done by the chair.
These include:
	1. Approaching individual past/potential donors for donations
	2. Mail requests for donations to some service clubs or other local community organizations (sample letters from past requests are on file, so just update the date and content slightly and send) (~3-7 each year)
	3. Do speaking engagements and pitches for funds (I did ~ 1/year)
	4. Starting specific projects e.g. foundations we might approach; legacy giving etc.
	5. Have an eye out for volunteers who might take on specific projects
4. **Overview of what LCCJ does in fundraising**
5. **Recent history -- What we have done**A review of the fundraising committee (FC) minutes shows that since 2019 we have undertaken the following fundraising activities (no doubt some are missing, this just gives an idea):
	* MCCSS, United Way and Perth& District Foundation requests (Joellen does these)
	* Service Clubs Appeals
	* Municipality Requests
	* Other local funders (e.g. the Hub, Commonwell)
	* Federal Grants: Dept. of Justice
	* Provincial Grants (other than MSSCC): Law Foundation of Ontario, Trillium,
	* Specific philanthropic individuals in the County
	* “Do Nothing Fundraiser” Christmas request letter (2x)
	* Got the polar bear plunge and organization underway
	* Golf Tournament 2019 and 2020
	* Craig Cardiff Concerts March 7, 2019
	* Identified a list of 9 possible family foundations

See the FC Minutes and reports to the board for all the details and tallies of funds raised to date.

1. **What we still want to do**We have identified the following as being useful. For some, we have taken small steps but consider beyond our ability right now to do (or do more) without funding or finding a volunteer to take them on:
	* Create a fundraising plan (this is part of the LCCJ strategic plan)
	* Approach the justice community for funds (lawyers, court officials etc.)
	* Events (if we want to continue with small events)
		1. Drive-in Movie fundraiser
		2. Dinner fundraiser
		3. Another Craig Cardiff concert
	* Approach the 9 family foundations identified and potentially others
	* Establish a legacy program encouraging people to name LCCJ as beneficiaries for a specified amount in their wills
2. **Key Documents**
	1. **Google Sheets**These are online documents so we have one “latest” document listing donors. Viewing/editing ability on the docs are shared by the Fundraising Chair, the ED and occasionally others.
3. The Constituents List
This was developed by Ross Dickson, Joellen and me in 2019 from various lists. It is our complete mailing list – all volunteers, past donors etc.
4. Grants and Funders List (Calendar)
A list of all our possibly recurring sources of grants/money large and small that we are applying to or considering applying to each year. Joellen makes most of these applications, the FC chair does some of them (the easy ones 😊)
5. Service Clubs/Municipalities/Funders – all the contact information and history related to past requests to Service Clubs & municipalities and other actual/potential sources of local funding
	1. **Folder with Key Documents:**Anthony created a folder on the board members part of the website called “Fundraising”. I am in the process of culling my files and posting to this folder relevant folders. This will include past agendas, minutes, sample ppt presentations, past fundraising events posters etc., funding request letters etc. This will be done by January 31, 2021.
6. **Free information sources online**

These are free sources of in formation related to nonprofit fundraising. You don’t need to subscribe to any of them, but I did and found them useful from time to time. Most of them have a newsletter or other info to which I subscribed:

* <https://www.keela.co/> “Keela is a comprehensive platform that gives you powerful, intelligent tools to manage your donors, mobilize your volunteers, market your nonprofit, and raise more money.”

### [www.blueskyphilanthropy.com](file:///C%3A%5CUsers%5CChristine%5CDropbox%5CVolunteerCommunity%5CLCCJ%5CFundraising%5CLeaving%20Fundraising%20Chair%20Dec%202020%5Cwww.blueskyphilanthropy.com)

Blue Sky Philanthropy, Toronto, On, Canada

### [**sumac.com**](file:///C%3A%5CUsers%5CChristine%5CDropbox%5CVolunteerCommunity%5CLCCJ%5CFundraising%5CLeaving%20Fundraising%20Chair%20Dec%202020%5Csumac.com)Quebec-based fundraising tools and software company with excellent free newsletter and free gifts etc.

* [www.theonn.ca](file:///C%3A%5CUsers%5CChristine%5CDropbox%5CVolunteerCommunity%5CLCCJ%5CFundraising%5CLeaving%20Fundraising%20Chair%20Dec%202020%5Cwww.theonn.ca) **The Ontario Non-Profit Network** Quality articles of use to non profit leaders, including on fundraising.
1. **Things to do January/February 2021**
* Find a new Fundraising chair – I had a “no” from Ann Trick, Deborah Duffy and Alfred von Mirbach. I sent an email to Joellen and Steve Graham with three recommendations.
* Follow up with Civitan (Almonte) re possible funds – ask Dave Burkett re who to approach
* Contact Lanark Highlands and schedule a presentation to council
1. **Final Note to the New Fundraising Chair**

Please be in touch with me so we can go over this note and the files together.

I am keen to pass on what I know and advise if/as needed.

Christine

Christine Peringer

613.259.2073

[christine@peringer.ca](file:///C%3A%5CUsers%5CChristine%5CDropbox%5CVolunteerCommunity%5CLCCJ%5CFundraising%5CLeaving%20Fundraising%20Chair%20Dec%202020%5Cchristine%40peringer.ca)