



**University
of Victoria**

**Continuing
Studies**

Learning that shapes who you are.

Cultural Resource Management Program

COURSE: HA488M Fundraising in Cultural Organizations
DATES: May 8 – 13, 2017
INSTRUCTOR: Dianne Lister
Email: diannelister@gmail.com
LOCATION: Room 108, Fine Arts Building, University of Victoria

Course Outline

Course Overview

Museums and heritage sites are increasingly being asked to generate operating revenue through philanthropy, sponsorship, private-public partnerships, in-kind gifts, and other various fundraising activities. This course will build your knowledge and understanding of the range of tools and strategies to engage communities, staff, board members, and private sector resources in co-creating sustainable museum and heritage programs. Through this course, you will consider donors as investors in the community-building capacity of your organization. New trends in private sector philanthropy will be explored in relation to the strategic vision and management of heritage and museum organizations.

Learning Objectives

The course will develop your ability to:

- Recognize the role of fundraising in the sustainability of museum and heritage site programming
- Develop and use tools and strategies for future fundraising activities
- Understand legal and governance issues
- Attract and retain donors as investors and partners
- Plan your fundraising strategies
- Market and communicate your mission statement to potential donors
- Engage your staff and board members in planning short and long term fundraising activities

Class Schedule

Monday May 8, 2017

TOPIC: Arts & Culture within the Canadian Charitable Landscape

9:00 - 10:30	Participant introductions and objectives; course overview and evaluation strategy
10:30 -10:45	BREAK
10:45 - 12:00	Introduction to Canadian Charitable Sector
12:00 - 1:00	LUNCH
1:00 - 2:30	The Big Picture: Fundraising Basics 101 (overview of required textbook – “Excellence in Fundraising in Canada”)
2:30 - 2:45	BREAK
2:45 - 4:30	Discussion: Competitive advantages and challenges within the Arts & Culture Sector
4:30 – 6:00	Optional social gathering at the University Club

Tuesday May 9, 2017 TOPIC: Profile, Engagement & Loyalty

9:00 - 10:30	Developing the Loyalty Ladder: Part One: Curious Visitor to Member
10:30 -10:45	BREAK
10:45 - 12:00	Developing the Loyalty Ladder: Part Two: Member to Donor to Benefactor
12:00 - 1:00	LUNCH
1:00 - 2:30	Case Studies & Analysis: Excellent Special Events that Raise Profile and Dollars
2:30 - 2:45	BREAK
2:45 - 4:30	Case Studies & Analysis: Engaging Donors and Prospective Donors through Anniversaries & Milestones

Wednesday, May 10, 2017 TOPIC: Building the Pipeline & Creating a Philanthropic Culture

9:00 - 10:30	Creating a Philanthropic Culture in your Organization – Everyone has a Role to Play
10:30 -10:45	BREAK
10:45 - 12:00	Establishing and Evaluating Annual Funds and Patrons Programs
12:00 - 1:00	LUNCH

1:00 - 2:30	Prospect Identification, Research & Rating – How to Build an Effective Pipeline
2:30 - 2:45	BREAK
2:45 - 4:30	Marketing, Donor Recognition & Stewardship – Demonstrating Impact

Thursday, May 11, 2017 TOPIC: Raising Significant Funds & Developing Partners

9:00 - 10:30	Corporate Sponsorships & Partnerships – Marketing Exhibitions and Programs
10:30 -10:45	BREAK
10:45 - 12:00	Role of the Leadership Volunteers in Raising Significant Funds – guest speaker TBC
12:00 - 1:00	LUNCH
1:00 - 2:30	Major Gifts & Planned Gifts – Earning the Commitment of Philanthropists and Exemplifying Best Practices
2:30 - 2:45	Travel to AGGV
2:45 - 4:30	Field Trip to Art Gallery of Greater Victoria, with host, Janyce Ronson – “Putting the Loyalty Ladder into Practice”

Friday May 12, 2017 TOPIC: BUSINESS PLANS & DEVELOPMENT PLANS

9:00 - 10:30	How Business Plans Anchor Development: Case Study: McMichael Canadian Art Collection
10:30 -10:45	BREAK
10:45 - 12:00	Understanding Financial Statements
12:00 - 1:00	LUNCH
1:00 - 2:30	Elements of a Development Plan: Assumptions, Resources and Industry Standards
2:30 - 2:45	BREAK
2:45 - 4:30	Creating the Framework for your Development Plan: in-class exercise to build a customized Development Plan

Saturday May 13, 2017 Ethics & Public Trust; Taking the Lessons Home

9:00 - 10:30	Overview of Ethics in Fundraising: AFP Code of Ethical Standards
10:30 -10:45	BREAK
10:45 - 12:00	Case Studies: Ethical Decision-Making – Understanding the Interplay between good business decisions, reputation management and ethics
12:00 - 1:30	WORKING LUNCH: Lessons you will take home
1:30 – 2:00	Course Evaluations