

On Target

AFP OTTAWA CHAPTER Summer 2008



On Target is an electronic publication of the Ottawa Chapter of the Association of Fundraising Professionals (AFP). It is distributed regularly throughout the year.

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Best Practices in Our Community: Mastering the Cold Call

by Kim Strydonck, CFRE

Cold calling is part of the job for most fundraising professionals but, for many, it has never been a task to which we look forward. Cold calling can be frustrating because the caller is often rebuffed and suffers a high rate of rejection. These calls are also frustrating for the person receiving the call, who expects, upon picking up the phone, to hear from someone they know and care about. Instead, they deal with a minor nuisance in the form of a sales pitch.

Wouldn't it be great to find approaches to overcome call reluctance and achieve results? Enter Melanie Yasinski and Terry Ledden! The two recently provided attendees of the AFP Ottawa 12th Annual Fundraising Conference a workshop on *Mastering the Cold Call*.

"Being successful at cold calling comes down to working on three areas: Passion, technique and behaviour," explains Yasinski, Director of Philanthropy at the Queensway Carleton Hospital Foundation. "The person at the other end of the phone can't see your face and body language, so he or she needs to hear your passion for your organization, not in an over-the-top way, but in a sincere way. Behaviour is the concept of 'just do it.' If it helps, give yourself a treat for every cold call you make."

Ledden, Managing Partner of Sales AboutFace and authorized licensee of Sandler Training, encourages us to "[a]pproach cold calls from a relationship building approach rather than with a sales mentality." To get us started, Ledden outlines techniques for success.

Introduction:

- Speak in a warm, friendly, sincere voice. "Hi, I'm looking for John, is he around?" If a gatekeeper asks who is calling, "Actually, it's personal." Ledden cautions to adjust this approach if you're trying to reach someone of the opposite gender -- it could be misinterpreted!

- When you reach your prospect: "Hi, it's Terry from ABC Organization. I probably caught you right in the middle of something, didn't I?" Your prospect will probably give you a minute, but if he or she is truly busy, arrange a time to call back.

Up- Front Contract:

- If the person has time, "Thanks, I appreciate that. Would it be alright if I take half a minute to tell you who I am and why I'm calling, and then you can decide if we should have a conversation or not? Does that sound fair?" You are taking the pressure off your prospect, giving them control and engaging them. Now it's no longer a cold-call. It's just a conversation.

30-Second Commercial:

- Give a brief explanation about your organization. "1 in 3 people in our community are affected by cancer. We're trying to increase survivorship. Do you know anyone affected by cancer?" This kind of pitch can be used by any organization, regardless of your mission. The goal is to create a connection and engage your prospect in conversation.



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Upcoming Educational Sessions & Events

June 18, 2008

Annual General Meeting
And Inspirational Lunch
with Stephen Greenberg

Fall 2008 Line Up:

September 17, 2008

Breakfast for Success
Code of Ethics – New
Additions to the Code
that Every Fundraiser
Must Know

October 2, 2008

Audio-Conference
Marketing Planned
Giving – Maybe We
Have It All Wrong?

October 15, 2008

Breakfast for Success
Small Shop – Big
Goals – Getting
Everything Done
While Growing
Your Organization

Watch for the next
edition of *On Target*
and visit
www.afpottawa.ca
for announcements
of more great
educational sessions
this fall!

The AGM and Breakfast
for Success sessions
will take place at the
Hampton Inn Ottawa
Conference Centre.
Audio-Conferences
take place at Saint Paul
University.

Member Spotlight:

Sarah Feldberg, Development Manager Great Canadian Theatre Company

By Dawn Cooper

How did your fundraising career begin?

I earned a BA in English and a Masters in Culture Studies. Then I went to Humber College to take Arts Administration in order to get a "real job." I was introduced to fundraising when I joined the National Arts Centre Foundation. I've been at the GCTC for five years, and have loved every minute of it!



What makes fundraising for a theatre particularly interesting or challenging?

Arts and culture is reflective of a healthy society. Fundraising is a challenge as people don't tend to give money to this sector. However, it does have the highest retention rate in sustaining donors who are committed to the arts. The GCTC has very loyal donors, who have helped us grow from an idea in the minds of several people at Carleton University, to a vibrant regional theatre which recently moved into the elegant, state-of-the-art \$12 million Irving Greenberg Theatre.

What advice can you offer to new fundraisers?

Don't burn yourself out! Manage your time; there's always a way to raise more money.

What do you most enjoy doing when you're not working?

I have a passion for special events, so I throw parties for myself! I'm also really excited about my upcoming trip to Europe, planned for later this summer.

"Ask Eric"

By Eric Dean, FAHP, CFRE
With Michelle Schafer



Eric Dean, FAHP, CFRE
AFP Ottawa President

How can I help Board members become comfortable with identifying and researching major gift prospects, in addition to making thank-you calls to donors?

Getting your Board "on board" is critical, and highlights the importance of your fundraising to others. Here are some strategies to help your directors ask for significant donations:

- **Start with the question "who else should hear our story?"** This will help Board members identify individuals who may be able to support your cause, and which of those potential donors would benefit from a face-to-face visit.

- **Demonstrate respect to prospective donors.** Show the Board that you want people to hear and consider your story in the context of their own values and priorities, as opposed to asking for a donation as a personal favour. If you demonstrate respect and sincerity in your approach, Board members may be more comfortable with sharing their network contacts.

- **Just say "thanks."** Board members can call to simply thank donors and ask them for feedback, to help the Board member better understand why donors give.

Please send your fundraising questions to jothurlbeck@rogers.com, subject line "Ask Eric." LIRE CET ARTICLE EN FRANÇAIS À LA PAGE 5.

AFP Ottawa Annual General Meeting & Inspirational Lunch

DON'T MISS IT...

June 18, 2008

Hampton Inn Ottawa
Conference Centre
100 Coventry Road, Ottawa

11:15 AM - Registration
11:45 AM to 1:15 PM -
Lunch, AGM and Keynote

Keynote:
Stephen Greenberg
AFP Ottawa's 2007
Volunteer Fundraiser
of the Year

**"The Noble Art of
Fundraising"**

Please join us for
business and an
inspiring message from
Mr. Greenberg!

[Click here to register](#)

Mastering the Cold Call (Continued from page 1)

Brief Conversation:

• Gauge which direction to take the conversation based on your prospect's interests. Rather than answering all of your prospect's questions, select the right moment to say, "Maybe getting together face-to-face would be appropriate; what do you think?" Pause to get his or her permission.

Set Up for New Up-Front Contract:

• "I don't know, at this point, whether ABC Organization is the right fit for your interests. I'm looking forward to meeting you so we can discuss this and see where it takes us, does that sound good to you?" This demonstrates that you're not forcing your agenda and builds trust.

"Top performers look for tasks that scare them, and then they go do them," reminds Ledden. "Give yourself permission to not be perfect the first time, and watch how you progress."

Mastering the Cold Call was a popular session at the AFP Ottawa 12th Annual Fundraising Conference, which attracted a crowd of 165. Be sure to attend next year's event – mark your calendar now for May 2009!

Interested in seeing an On Target article that features your charity or consulting agency? Contact us at jothurlbeck@rogers.com

How AFP Ottawa Serves You:

A Word from Your Chair of Professional Advancement

By Daniel Clapin, ACFRE with Michelle Schafer

As your Chair of Advancement, my mandate over the past two years has been to encourage AFP Ottawa members to be motivated by learning. I truly believe that if we advance personally and collectively, we will advance as a profession.

I am pleased to report we have over 40 CFREs in the National Capital Region. Seeing the smiles on the faces of new CFREs has been a highlight for me.

A great way to prepare for the CFRE is to use the AFP Ottawa Study Buddies program. Participants find that this program helps tremendously as they prepare to write the exam. The next session will begin on September 26.

In the 2008 membership survey, several individuals indicated an interest in pursuing the ACFRE, or Advanced Certified Fundraising Executive designation. The ACFRE represents the highest level of advancement within the field of philanthropy. In fact, there are only 5 in Canada and 81 worldwide. The ACFRE can be obtained within two to three years, and the process is comprised of four stages: application, exam, portfolio of activity and face-to-face peer review. If you are interested in obtaining your ACFRE, please call me.

I have been working as a professional fundraiser since 1984, receiving my CFRE in 1994 and my ACFRE in 2002. As Director, Alumni and Development for Saint Paul University, I focus on acquiring donors, renewing donor support and upgrading donors to higher giving levels.

As my term on the AFP Ottawa Board comes to an end, I would like to tell you what an honour it has been to serve you. I look forward to keeping in touch with AFP members. Professional advancement is a lifelong journey – best of luck with yours!

Daniel Clapin, ACFRE
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News Briefs

LOCAL NEWS

● **CONGRATULATIONS TO DAVID TIMMS, CFRE:** David Timms, CFRE, Senior Development Associate with the Faculty of Science at Carleton University, is AFP Ottawa's newest CFRE.

● **PLAN TO ATTEND THE AFP OTTAWA PHILANTHROPY AWARDS 2008:** This year's event will take place on Wednesday, November 12, 2008 at the Canadian Museum of Civilization in Gatineau. For more information or to nominate someone (hurry, the deadline is June 6!) **click here.**

● **VISITOR FROM AFP INDONESIA:** AFP Ottawa was proud to host Hannah Baerveldt, of AFP Jakarta, Indonesia at the AFP Ottawa Fundraising Conference on May 14th. "I am deeply grateful for the very warm welcome and supportive attitudes consistently shown to me during my brief visit."

● **BIG WINNER: GILLES LATOUR:** Congratulations to Gilles Latour of CGA-Canada Research Foundation, who won the AFP Ottawa 2008 Membership Survey Draw for two tickets to the Canadian Museum of Civilization IMAX Theatre!

NATIONAL NEWS

● **CRA PROPOSES NEW LEGISLATION ON FUNDRAISING COST GUIDELINES:** The Canada Revenue Agency has proposed new guidelines on how charities should report fundraising costs and whether expenses can be considered charitable or fundraising. AFP will submit comments to the CRA prior to the June 30, 2008 deadline and invites members' feedback to be part of the submission. **Read more by clicking here.**

● **AFP SEEKS TO EXEMPT CHARITIES FROM DO-NOT-CALL LIST FEES:** The AFP joined with Imagine Canada in filing a petition, on April 28, to the Governor in Council to seek relief for all registered charities from unfair fees proposed by the Canadian Radio-television and Telecommunications Commission (CRTC). AFP will report back to members when an official response to the petition is released. **Click here for more information.**

● **A GOVERNMENT-RECOGNIZED NATIONAL PHILANTHROPY DAY WITHIN OUR GRASP:** Bill S-204, proposing that the Canadian government recognize November 15, every year, as "National Philanthropy Day," was recently unanimously passed by the Senate and will soon be voted upon. **Click here for details on the Bill and how you can help.**

CAREER ADVANCEMENT OPPORTUNITIES

● **AFP OTTAWA CFRE STUDY BUDDIES PROGRAM TO BEGIN IN SEPTEMBER:** The 2008-2009 AFP Ottawa Study Buddies program will begin on September 26, 2008. Watch for more information over the summer. **For more details, please contact Daniel Clapin, ACFRE.**

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RESULTS OF 2008 MEMBERSHIP SURVEY:

29% of members responded to the AFP Ottawa 2008 Membership Survey. Thank you for participating! Key finding: The most important professional concerns for respondents are ethics of professional fundraisers, the availability of fundraising/non-profit academic educational opportunities in Ottawa, and expectations for good management on a shoestring budget. For more details on issues of importance to your colleagues, **click here.**

Parting Quote...

*In good times
and bad,
we know that
people give because
you meet needs,
not because
you have needs.*

- Kay Grace

AFP Ottawa Community Relations & Communications Committee

Kim Strydonck, CFRE
Benoit Brunet
Dawn Cooper
Michelle Schafer

News Briefs Continued ...

• **NEW COURSE ON RECEIPTING CHARITABLE GIFTS IN CANADA:** Charityvillage.ca offers several courses including a new one on receipting. [Click here for more details.](#)

RESEARCH AND TRENDS

• **QUESTIONING FUNDRAISING'S 'INEFFICIENCIES':** Can academic research help fundraisers better meet their bottom line? As researchers begin to examine the science of fundraising, it seems the answer could be "yes". [Click here for more details.](#)

• **INTEGRATING FUNDRAISING ACTIVITIES KEY TO SUCCESS:** An AHP study finds the most successful fundraising programs emphasize building relationships, and cultivating and maintaining major gift donors. A wide assortment of fundraising programs yields higher revenue than only one or two programs. [Click here for information.](#)

• **TECH-SAVVY MILLENNIALS THE NEW VOICE OF PHILANTHROPY?** Millennials, also known as Generation Y (born in 1982 and after) show strong promise to be the next great civic-minded generation. [Click here for details.](#)

« Demandez à Eric »

Par Eric Dean, FAHP, CFRE
Avec Michelle Schafer et Benoit Brunet



Eric Dean, FAHP, CFRE
Président de l'AFP d'Ottawa

Comment puis-je aider les membres du conseil d'administration à être plus à l'aise avec l'identification et la recherche de donateurs potentiels d'un don majeur et faire des appels de remerciements ?

Rallier votre Conseil est crucial et souligne le prestige de votre campagne au reste du monde. Voici des stratégies pour aider les membres de votre Conseil à demander des dons substantiels :

• **Commencez par la question : « Qui d'autres devraient entendre notre histoire ? »** Cela aidera les membres du Conseil à identifier les personnes susceptibles d'appuyer votre cause ainsi que les donateurs éventuels qui seraient intéressants de rencontrer personnellement.

• **Soyez respectueux envers les donateurs éventuels.** Montrez au Conseil que vous voulez que les gens écoutent votre histoire pour y retrouver leurs propres valeurs et priorités au lieu de leur demander un don en tant que faveur personnelle. Si votre approche est respectueuse et sincère auprès des membres du Conseil, alors ils seront peut-être plus à l'aise de partager leur réseau de contacts.

• **Un simple « merci ».** Les membres du Conseil peuvent remercier les donateurs et discuter avec eux pour mieux comprendre pourquoi ils donnent.

Envoyez vos questions dites philanthropiques à jothurlbeck@rogers.com. Indiquez «Demandez à Eric» dans l'objet.