Fundraising Off the Side of Your Desk

Building Toward Long-Term Sustainability —

Presented to the Knowledge Development and Exchange Hub

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Me circa 2020, before the beard and my early audition for mall Santa.

20 Years of Experience

Deep roots in Canada's non-profit sector, working with organizations from coast to coast.

Certified Fundraising Executive

B.A. and M.A. in History. Rigorous training meets real-world strategy.

Specializes in Small and Mid-Sized Orgs

Passionate about helping non-fundraisers succeed, because great missions deserve great support.

Be Honest: You Did Not Sign Up for This

Most of you came into this work to deliver a program; to serve children, youth, and/or families. Sustainability quietly landed on your desk anyway, often without a roadmap or extra capacity to handle it.

Today is not a crash course in fundraising. It is practical, grounded thinking about where you are, what is actually in front of you, and what a realistic next step might look like, without pretending you have a development team waiting in the wings.

What Is Actually Happening

You were hired to deliver programming, and for a long time, that was the entire job. Then, somewhere around the last few years, the sustainability question arrives. Suddenly, program staff are expected to think like fundraisers, write development plans, and cultivate donors, on top of everything else and with no extra resources.

Not a Failure

This shift reflects a reality many organizations are facing, one most funders under-prepare grantees for.

A Stage, Not a Crisis

Recognizing where you are in that arc is the first step. You are not starting over; you are building on years of proven work.

You Have More Than You Think

Evidence, relationships, outcomes, and credibility; these are assets most early-stage fundraisers do not have. You do.

Reframing Your Goal

It is sustainability, not fundraising.

When we conflate the two, the task feels impossibly large. When we focus on sustainability (protecting something that already works, for the people who depend on it) the path becomes clearer and more motivating.

You are not trying to become a development professional. You are trying to ensure that work you have already built, already proven, and already delivered continues to reach the children, youth, and families who need it.

The Risk of Single-Funder Dependency

When one funder covers the majority of your operating budget, that funder becomes a single point of failure. Government priorities change. Program officers move on. Terms shift. Funding streams close, sometimes with little warning.

Diversifying your revenue base is not an act of distrust toward your current funder. It is an act of responsible stewardship, by protecting the program you have built, the staff who deliver it, and the community members who rely on it.

⚠ Programs that wait for the funding cliff to arrive before building new relationships rarely have enough time to recover.

Example: The start of the pandemic

One Funder

One decision ends everything. No buffer, no runway, no alternatives.

Diversified

Multiple streams provide stability when any single source shifts or disappears.

What Sustainability Can Look Like

There is no single right model. The goal is to build a mix of revenue sources that fits your program's context, your organization's capacity, and the communities you serve. Not every option below will apply, but most programs can pursue at least two or three.

Multi-Year Government and Foundation Grants

The closest match to your current funding model. Longer timelines require early relationship-building with program officers and clear outcome documentation.

Earned Revenue and Fee-for-Service

Where the model and mandate allow it; training delivery, consultation, licensing. Requires careful margin analysis.

Corporate Partnerships

Aligned with cause-related marketing, employee engagement, or community investment mandates. Works best when the partnership tells a genuine story.

In-Kind Support

Donated goods, services, or space that reduce operating costs. Often overlooked, but genuinely valuable on a constrained budget.

Individual Giving

Including monthly giving programs. Builds a loyal donor base over time. Lower per-gift value, higher long-term retention and predictability.

Example: Second Harvest Canada

Start Small. Start Realistic.

You are not building a development department this year. That expectation is not fair, not practical, and not necessary at this stage.

01

Draft Your Case for Support

Even a rough first draft, i.e. two pages, honest language, real numbers, is more than most programs have.

02

Name Five Champions

Who already believes in this work and has relationships or resources to open doors? Write five names down today.

03

Research Three Foundations

Find three funders whose priorities align with your outcomes. Read their guidelines. Note their deadlines.

Pick one of those three actions. Do it before the end of the month. Let it build on itself over time, because momentum matters more than a perfect plan.

Demystifying Fundraising

Think fundraising requires a massive budget, lavish galas, and a rolodex full of wealthy donors? Think again. The most effective fundraising is built on relationships, shared values, and compelling stories, and your organization already has all three.

The Myth

You need big budgets, big events, and wealthy donors to fundraise successfully.

The Reality

Fundraising is about authentic connections, clear values, and stories that move people to act.

Your Advantage

You have trust, deep community roots, and firsthand evidence of real impact, that's powerful.

Building a Simple Fundraising System

You don't need to reinvent the wheel every time. A lean system lets you stay connected with donors without burning out or letting your programming work suffer. Start small, be consistent, and build from there.

Keep It Focused

- Commit to just 2–3 donor touchpoints you can realistically sustain
- Set aside one dedicated block of time each week or month for all donor-related tasks
- Set clear boundaries to protect time for your main role

Work Smarter, Not Harder

- Draft thank-you notes, update emails, and meeting agendas once, then reuse and adapt them
- Leverage tools you already use, like calendar reminders, spreadsheets, or a lightweight donor database
- Automate where possible with scheduled emails or shared folders for reports
- Write down what you did and when, so nothing slips through the cracks

Example: AdaptAbilities

Quick Wins for the Accidental Fundraiser

You don't need to launch a capital campaign to make a difference. These low-effort, high-impact tactics fit into what you're already doing, and can generate meaningful revenue without major planning or resources.

Small-Scale Campaigns

Donation jars at your front desk, micro-campaigns tied to a specific need, or birthday fundraisers on social media. These are simple to launch and easy for supporters to share.

Leverage What You Already Have

Add a fundraising moment to events you're already hosting, i.e. facility tours, open houses, or special recognition days. No extra planning required; just a brief, heartfelt ask.

Tap Into Your Networks

Your Board members, local businesses, and community service clubs are warm audiences. Ask them to spread the word, make an introduction, or co-host a small fundraising effort.

Telling Your Story

Facts inform, but stories inspire action. The most effective fundraising communications combine a clear narrative structure with specific, tangible details that help donors see (and feel) the difference their support makes.

The Formula That Works

1

Problem

What is the challenge or unmet need in your community?

2

Solution

What is your organization doing to address it?

3

Impact

What difference does it make? Who benefits, and how?

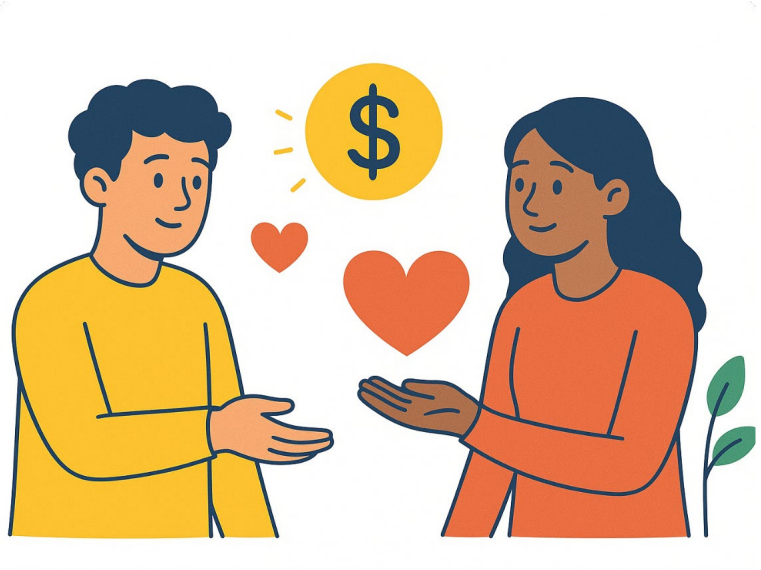
Tips for a Stronger Story

- Be specific: link donation amounts to tangible outcomes (e.g. "$50 provides a week of after-school meals")
- Use visuals: photos, short videos, or a single powerful quote bring the story to life
- Share real anecdotes: a brief personal story from a client, volunteer, or staff member adds authenticity
- End with a clear call to action: tell prospective donors exactly what you want them to do next

Example: Polish vs. enthusiasm

Making the Ask

The ask feels hard because we worry we're taking something. Reframe it: you're offering donors a meaningful opportunity to invest in something they care about. They give through you; your organization is the vehicle for their values.



1 Share the Story

Open with a brief, specific story that illustrates the need. Make it human and real; one person, one moment.

2 Name the Need

Clearly describe what you're raising funds for and why it matters right now. Keep it focused and honest.

3 State the Amount or Action

Make a specific ask. Connect the dollar amount to a tangible outcome. For example, *"$25 buys a book for the reading corner,"* so donors know exactly what their gift does.

Remember: donors are investors in your mission, not customers buying a service. Treat the ask as an invitation, not a transaction.

Donor Stewardship

Keeping a donor is far easier than finding a new one. Thoughtful, genuine stewardship, not high volume or elaborate gestures, is what builds lasting loyalty. A few meaningful touchpoints a year can make all the difference.

Say Thank You…Genuinely!

A quick, personal thank-you by email, handwritten note, or phone call goes a long way. Acknowledge the gift within 48 hours when possible.

Personalize the Connection

Share a specific story or program update that ties directly to their gift. Help donors see the real-world difference they made.

Know Your Limits

A few well-timed touchpoints a year like a newsletter, an update, or a personal note, matter far more than constant contact.

Example: The Terra Centre

Your Case for Support

A Case for Support is a single, clear document that answers the four questions every funder, donor, or board member will ask:

- What do you do?
- Why does it matter?
- Who does it serve?
- What does it cost?

It is not a grant application. It is the foundation beneath every grant application, every ask, and every board conversation you will ever have about sustainability.

The High-Value Tool Many Organizations Don't Have

Once written, a strong Case for Support dramatically reduces the time required for each subsequent funding request. You stop starting from scratch. You start refining and targeting.

It also creates internal alignment; when your team, your board, and your champions are all working from the same document, the message stays consistent regardless of who is in the room.

If you do only one thing after today, write your Case for Support.

A good case is an appetizer, not the main course.

Your Board and Your Ambassadors

You should not carry the sustainability challenge alone. The good news is that you almost certainly do not have to, if you are willing to have a direct conversation about what you actually need.

What Your Board Can Do

- Open doors to funders and donors you cannot reach independently
- Lend credibility to asks and grant applications
- Help draft or champion the Case for Support
- Make their own gifts to demonstrate board commitment

What Other Ambassadors Can Do

- Make warm introductions to foundations or corporate contacts
- Speak publicly about the program's impact
- Connect you to networks and peer funders
- Provide non-financial support that lowers your cost base

A direct conversation about expectations (what you need, what they can realistically offer) is worth more than a dozen Board meetings that never name the ask.

Example: JDRF Canada

Grants Versus Relationships

One of the most important distinctions in sustainability planning is understanding that winning government grants and building donor relationships are genuinely different disciplines, with different skills, different timelines, and different success factors.

Government and Institutional Grants

A specific, learnable technical skill. Competitive, outcome-driven, deadline-oriented. Success depends on strong data, clear deliverables, and alignment with funder priorities. Being good at this does not prepare you for major gifts.

Donor and Foundation Relationships

Slower, more personal, built on trust over time. Requires cultivation before solicitation. Often no formal application, just a relationship that has matured to the point of readiness. Success in grants does not guarantee success here.

Recognizing which discipline a given opportunity requires helps you invest your limited time in the right way, and know when to ask for help.

Examples: The Liu Fu Yu Charity Foundation and Jewish Community Foundation of Montreal DAF

Realistic Timelines

New funding relationships take one to three years to mature.

Prospective funders rarely give to organizations they have just met. They give to organizations they have come to trust through consistent communication and demonstrated impact.

If you are two or three years from the funding cliff, there is real time to build. Start before you hit a crisis point.

Where to Get Help

You do not need to figure this out alone. A range of resources exist, many of them affordable or free.

Consultants

For defined, affordable scopes of work, i.e. a Case for Support, a prospect list, a grant review. You don't need a retainer to get value.

AFP

The Association of Fundraising Professionals offers training, local chapters, and peer connection for people at every experience level.

CAGP

The Canadian Association of Gift Planners specializes in planned and major giving, a longer-term but high-value discipline to understand.

Imagine Canada

A rich, freely available resource library covering governance, funding strategy, sector standards, and more.

This Room!

The peer network already gathered here is one of the most underused resources available to each of you. Share what is working.

Bringing It Back to Impact

> **Sustainability planning is the foundation of your mission, not a distraction from it.**

Every hour you invest in building toward financial sustainability is an hour invested in the children, youth, and families counting on your program to still be there next year, and the year after that.

The goal is simple, even when the path is not: protect what works. Start where you are and then take the next small step.

Questions and Discussion

The floor is now open! Here are some questions for you to think about, but is there anything you'd like to ask me?

Where Is Your Organization Sitting Right Now?

Are you two years from the cliff, or already at the edge? What does your current revenue picture actually look like?

What Feels Like the Biggest Barrier?

Capacity? Knowledge? Board engagement? Naming the barrier honestly is the first step to getting past it.

What Is One Small Step You Could Take This Year?

Not a plan. Not a strategy. One doable action before the end of your fiscal year.

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Thank You!

Let's keep the conversation going, whether you have follow-up questions or are ready to take the next step in your fundraising journey.

Get in Touch

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