# Shared Services

Supporting Investees with Fundraising + IT

# Introductions + Overview

A pilot project

# IT

"I'm stuck and feel like I'm being held hostage"

# Fundraising

Show me the money!

# Q&A

Help us (help you?)!

# A Shared Services story…

## Too much admin

- Pilot - a work in progress

- Environmental Scan

- Needs Assessment

- Funding Model

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# Question - What is IT in our context?

- Common themes?
- What can we address and how?
- What impacts can we make?

**Approach** - Ask and Listen

Investees may be unique?

# Discovery - Evolved 3-Step Approach

1. **IT Assessments Phase**
   - 90 minutes, no formal preparation
   - "Language of the Investees"
2. **Work and Data Flow, Pain Points**
   - Priorities, Opportunities, map to Scaling Plans
   - Framing, Scoping, Initial added value
3. **IT Go-Forward Plans**

   - Mapping to Investee Realities

Investee IT Projects - 50/50 funding up to $5K from SVP

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# One Year On - From a Standing Start

- Engaged with 10 Investees so far and counting
  - Two projects went live last week
  - 4 in process, 5 "on deck", + New Investees

- Very positive reactions, good "buzz" from Investees and Partners



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# What sort of projects came forward?

1. Urgent website replacement
   a. "Sticker Shock", being "held hostage", it's 2018??
2. Database/CRM to address data and workflow needs
3. Advanced Volunteer Scheduling and Management
4. Workflow - simplification, productivity and automation
5. "There's an app or plug-in for that" overkill & integration issues
6. Case Management & longer-term engagement with "clients"

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# Pop Quiz - Question #1

## TRUE OR FALSE

Using technical IT language (products, technologies, suppliers) to explain concepts to our Investees is the most effective way to communicate.

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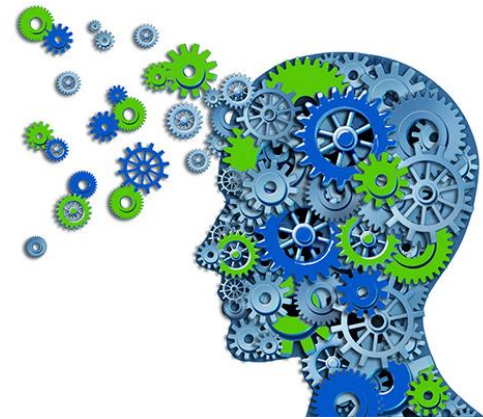
# Pop Quiz - Question #2

## TRUE OR FALSE

There are service and product suppliers specific to non-profits that do a much better job than conventional companies serving the private sector.

…

# Pop Quiz - Question #3

TRUE OR FALSE

It is best to approach projects slowly and with a comprehensive planning process to identify all areas of improvement, prior to taking any actions.

...

# Pop Quiz - Question #4

TRUE OR FALSE

Given the technological advances available in 2018, solutions are simpler and more obvious.

...

# WHERE TO START?

The OCAT Fund Development exercise identifies key ingredients for fund development to thrive.

**Goal:** Help Investees rise to their full potential.

# Key Ingredients

- DATA MANAGEMENT
- FUNDRAISING SKILLS
- FUNDING SOURCES
- STRATEGY + RESOURCES
- ACCOUNTABILITY
- REVENUE GENERATION

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# …let's get cookin' … PRIORITY PIE

**DATA MANAGEMENT**

CRM

Prospect Screening

**FUNDRAISING SKILLS**

Relationship Management

Excellent written + oral communications

Comfortable with soliciting gifts

Leadership

**FUNDING SOURCES**

Individual Giving

Corporate Giving

Grants (private/public)

**STRATEGY + RESOURCES**

Approved budget

Fundraising Plan

Case for Support

**ACCOUNTABILITY**

Gift acceptance policies + procedures

CRA guidelines

Donor Bill of Rights

**REVENUE GENERATION**

Social Enterprise

Cause-related marketing

Earned Revenue

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# Challenges

- Not enough time – priority and pace

- Fear of fundraising

- Leadership gaps

# Learning

- Immersive Focus

- Group sessions and collaborative debriefs

- Learning by doing – strategy sessions + key deadlines in calendar
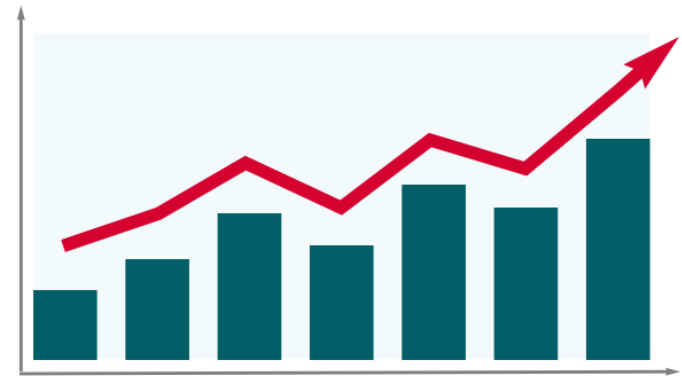
# New Opportunities

- Retreats

- Monthly fundraising debriefs

- Engage alumni

# The Future
## Growing Shared Services

- Social Impact Coach
- Financial Reviews/Bookkeeping

# Q&A

Wait, we have 'suggested' questions…

- Do the power dynamics of a funder providing these services create any issues?
- Are there any differences between an employee vs. partner led service?
- Your turn!

# Thank You!

(or you can keep talking to us)

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