

# SURVIVOR 101

FOR COMMUNITY ARTS ORGANIZATIONS



## THE NEXT GENERATION...

# *“Getting Your Funding Ducks in a Row “*



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# Getting Your Funding Ducks in a Row...

## Tuesday, October 29th

9:00 – 9:05	Welcome - <b>#survivor101</b>
9:05 – 9:40	Panel Presentation
9:40 – 10:00	Break & Networking
10:00 – 10:10	Life Cycle presentation
10:10 – 10:40	Breakout session #1
10:40 – 11:10	Breakout #2
11:10 – 11:40	Breakout #3
11:40 – 11:50	Q&A
11:50 – 12:00	Summary Highlights
12:00	Close



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# Stage-based Non-Profit Lifecycles

©Susan Kenny Stevens, Ph.D

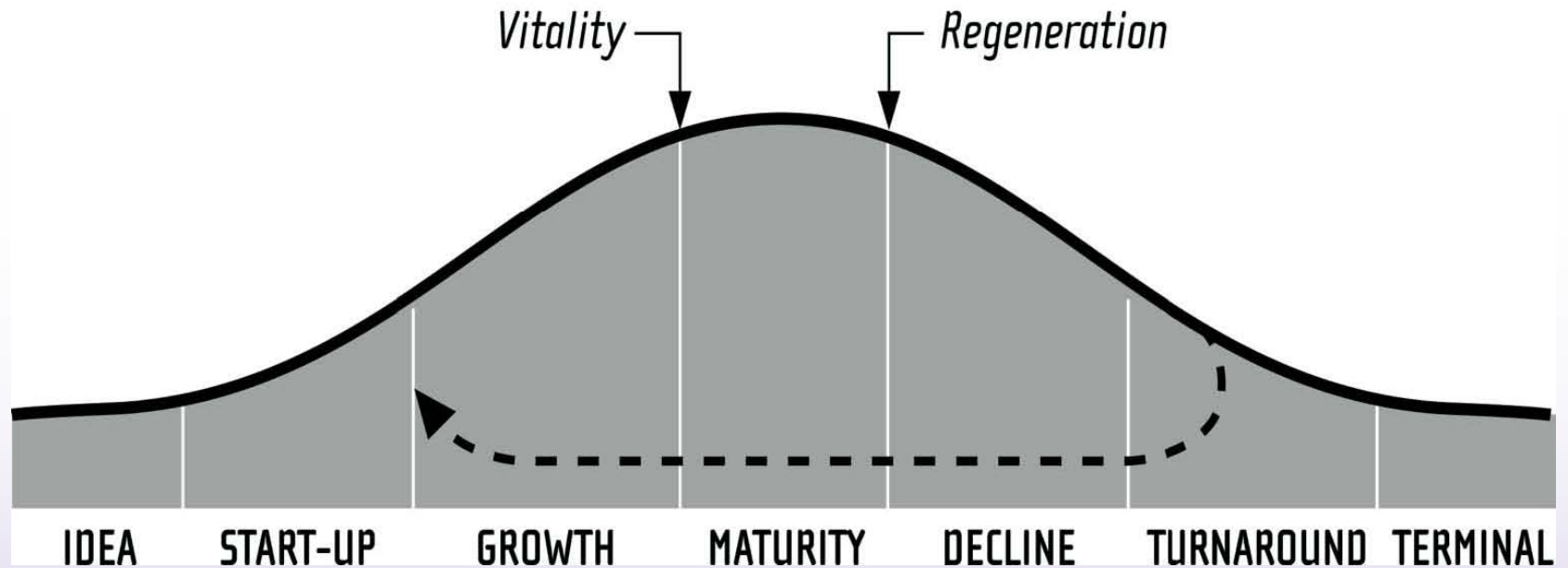
“A stage is a developmental period when characteristic patterns of behavior are evidenced and certain capacities become established”.

[http://www.philanthropyNW.org/s\\_pnw/bin.asp?CID=19671&DID=47299&DOC=FILE.PDF](http://www.philanthropyNW.org/s_pnw/bin.asp?CID=19671&DID=47299&DOC=FILE.PDF)



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# Non-Profit Lifecycle Stages



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# Non-Profit Lifecycle Stages

## Benefits to Organizational Development

- Establishes a solid assessment tool for organizational performance
- Assists in aligning capacity with organizational position
- Helps determine planning priorities for organizational development



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# Non-Profit Lifecycle Stages

## Stage One - IDEA

**Characteristics** - Perceived need sparks founding idea/vision. Programs not defined but driven by personal mandate, no management or Board yet but committed group of supporters with personal connection to mission, self-funded by sweat equity & personal investment , no systems yet.

**Challenges** - Identifying the un-met need, developing a mission that is relevant to the community.

**Resources Needed** - Community need and support, systems, structure, resources.



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# Non-Profit Lifecycle Stages

## Stage Two - STARTUP

**Characteristics** - Energy/passion is high, but systems are lacking. Simple experimental programs emerge, most experienced member emerges as leader, Board still personally connected, low budget, financial/admin systems weak and often outsourced.

**Challenges** - Sharing the mission and responsibility with staff, Board and community support, knowing when to say 'no', turning sweat equity into external support, living within means.

**Resources Needed** - Defined structure (staff and Board) and systems.



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# Non-Profit Lifecycle Stages

## Stage Three - GROWTH

**Characteristics** - Demand exceeds availability and resources. Programs/services differentiate in sector, Management sees infinite potential, Board structure appears, more resources demand greater accounting/compliance complexities, weak systems need to be significantly improved to meet demands/growth.

**Challenges** - Aligning demand with resources, developing Board, est. strategic focus that allows vision to flourish within structure, formalizing org. structure, adapting to change, diversifying revenues.

**Resources Needed** - Board development, strategic planning, system development.



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# Non-Profit Lifecycle Stages

## Stage Four - MATURITY

**Characteristics** - Established reputation for consistent/relevant programs and services, solid org. foundation, in touch with community needs, Mgmt often 2<sup>nd</sup>/3<sup>rd</sup> generation, Board sets direction/policy-oriented & distinct from Mgmt role, diversified revenue sources, clear and defined structure/systems.

**Challenges** - Remaining client-focused rather than policy-bound, keeping staff motivated on mission, building reserves, maintaining 'edge'.

**Resources Needed** - Long-term planning, continual ED /Board dev., renewal of systems and structure



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# Non-Profit Lifecycle Stages

## Stage Five – DECLINE

**Characteristics** - Status quo decision-making , focus on internal needs rather than external. Programs losing edge, decrease in audience/clients, Mgmt unaware or blaming external factors, Board unaware/uninformed, budgets are fixed cost expense-heavy, historical budgeting, systems/space require updates.

**Challenges** - Focus on community need, deleting duplicate programs/services, keeping Board informed/engaged, raising sufficient revenues to avoid drawing from reserves, admin-expense heavy.

**Resources Needed** - Process of self-assessment - realignment of operations and programming.



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# Non-Profit Lifecycle Stages

## Stage Six – TURNAROUND

**Characteristics** - Demonstration of critical self-assessment/awareness & decision to improve relevance. Programs/services re-assessed and modified in context of community need and viability, Leadership is strong with clear sense of direction, core and committed Board ready to restore org. integrity, expenses cut, policies/procedures being re-evaluated

**Challenges** - Finding champion to lead change, est. turnaround culture, having open dialogue with community/constituents.

**Resources Needed** - Committed leadership, community and constituent support for transition.



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# Non-Profit Lifecycle Stages

## Stage Seven – TERMINAL

**Characteristics** - The will/reason to exist is lost. Programs/services inconsistent and under-resourced, Mgmt & staff decreased often unpaid, Board has lost its drive & exists in name only, no money and often accumulated debt, systems abandoned, decisions and work occur on ad-hoc basis.

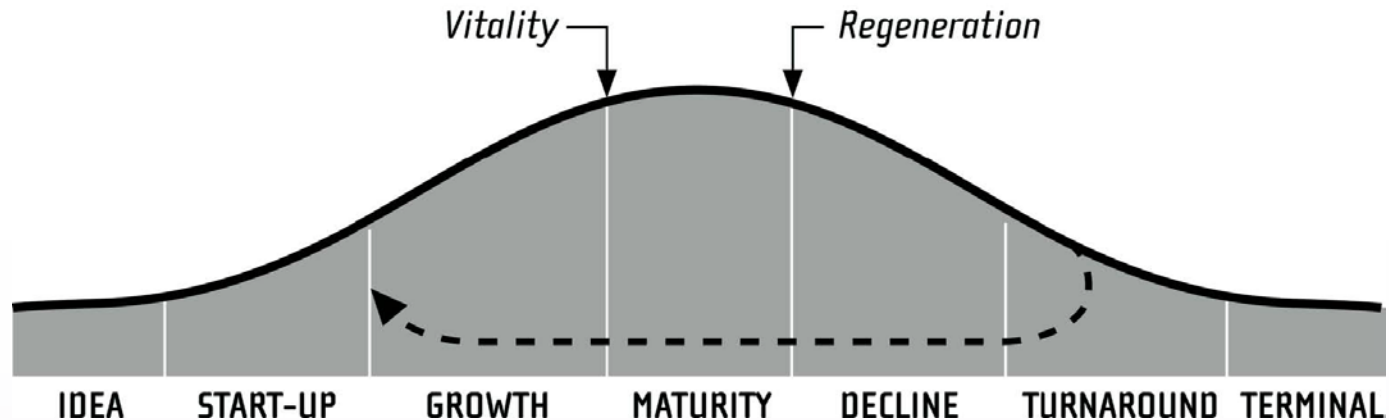
**Challenges** - People to take on responsibility for org. transition or termination, accepting fate, closing in honorable manner with least impact to community, communicating to stakeholders.

**Resources Needed** - Commitment of key leaders to wind-up, open dialogue with community/funders, external professional legal and financial guidance to ensure compliance.



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# Breakout #1



- Which lifecycle stage is your organization's FINANCIAL resources in?
- What is needed for growth and sustainability?



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# Breakout #2

**What are the critical elements to a successful application?**

- Looking at the application from the funder's perspective.
- What are the funders' objectives and priorities when it comes to investing in culture? And does your project support them?



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# Breakout #3

**It is important in this shifting funding climate to be accountable for the financial health of your organization.**

- Are you exploring other income-generating options or social enterprise, in-kind, sponsorships?
- How are you engaging your funder in your work to show the impact it is having in the community?



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# Summary



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# Breakout #1

## Life Cycles

### Summary of attendees' life cycle stages

The numbers indicated how many organizations identified themselves under each stage.

Idea	Start-up	Growth	Maturity	Decline	Turnaround	Terminal
1.5	4.5	15	14.5	4.5	9	0



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# Breakout #1

## Life Cycles

- Start-ups challenged with admin needs; could use a facilitator to help with admin plans;
- Do a course on web-site development on funding
- Funders need to know that **“we want assured operating funds” and a long-term commitment**
- Info meetings could help organizations meet with each other to share project ideas/network, connections, support and resources
- Strong volunteer base with energy, expertise, time, engage younger generation
- Need a strong mandate
- Board development – policy, program awareness & program awareness volunteer



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# Breakout #1

## Life Cycles

- Build connection with youth, young audiences
- Volunteer resources: Volunteer Canada, high school & university students
- Need to develop **strategic plans** in order to meet the needs of the community
- Need a process for self-assessment
- How can we “tell our stories differently”?
- Need more funding for “**outreach**”, **audience awareness**
- Change ho
- use “spaces” ...alternate spaces, etc.; need space to work



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# Breakout #1

## Life Cycles

- Be adaptable to change (e.g. social media)
- Don't rely on one (or a minimal) source of revenue; seek multiple revenue streams
- How to incorporate volunteers and unpaid staff into grant applications? Is this a deterrent for funders or an asset in the application?
- Build better relationships with local businesses in the community
- Mentorship programs by businesses for non-profits
- More established organizations need to be creative and be open to renewal



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# Breakout #2

## What are the critical elements to a successful application?

- Know your funders; share success stories; educate your funders
- Meet your funders in person
- Share your passion for your work
- Know the funders' objectives
- Demonstrate that your Board knows how to allocate funds resourcefully
- Follow-up with funders post-application



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# Breakout #2

## What are the critical elements to a successful application?

- Provide opportunities for sponsors to connect with our audiences
- Be realistic; don't shy away from challenges
- That the project fulfills a need and benefits the community
- Show evidence of measurable outcomes, number of attendees, audience surveys, testimonials
- Provide sponsors with tickets
- Show a diversity of revenues (multiple streams)



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# Breakout #2

## What are the critical elements to a successful application?

- Clear mission and mandate
- Create clear summary/synopsis of your project (a 2-sentence summary that everyone understands)
- Be clear, concise...don't be vague
- Read and re-read your application before submitting; make sure goals, budgets, evaluation process is clear and realistic
- Be honest...don't inflate your outcomes, budgets, etc.
- Make sure your budget balances



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# Breakout #2

## What are the critical elements to a successful application?

- Tell a compelling story
- Remember that some funders are looking for “What’s in it for us?” ... how does your program mandate align with the funder’s?
- Demonstrate that your organization is sustainable
- Have a well articulated, defined audience
- Have metrics available to support your applications (e.g. audience demographics, attendance figures)
- Provide samples of how and where the funders were acknowledged.



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# Breakout #2

## What are the critical elements to a successful application?

- Depending on the funders, make sure you are paying your artists
- That your project has well-laid out steps
- Follow-up after an adjudication was or wasn't successful
- Build relationships with advocates and spokespeople
- Use testimonials, photos, letters of support



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# Breakout #3

**Are you exploring other income-generating options or social enterprise, in-kind, sponsorships?**

- Income from building/facility/equipment rentals
- Onsite businesses supporting initiatives/projects (e.g. partial proceeds from the coffee shop revue)
- Special event fundraisers supported by in-kind
- Always have a donation box available at any events, or in your lobbies
- For new facilities promote opportunities for invest in specific capital needs – dishwasher; cabinets, AV equipment, etc



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# Breakout #3

Are you exploring other income-generating options or social enterprise, in-kind, sponsorships?

- Restructure sponsor benefit package
- Broaden scope of funders/sponsors – “unlikely bedfellows”
- Crowd sourcing
- Work with your municipal offices
- Work with developers – “Amenity contribution”
- Kickstarter, Indigogo, Chimp.org, Aviva, Canada Helps
- Ask for smaller amounts from smaller businesses



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# Breakout #3

**How are you engaging your funder in your work to show the impact it is having in the community?**

- Try and get media coverage for your event or project – interview the funder(s)
- Naming rights
- Invite funders to meet your board
- Invite funders to the event or project completion
- Ask funder if they would like to volunteer at the event



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# Breakout #3

How are you engaging your funder in your work to show the impact it is having in the community?

- Thank your funders/sponsors
- Build and maintain ongoing relationships with funders thru ongoing invitations, tickets, discounts on works of art, etc
- Offer free meeting opportunities in your space
- Gifts of art work by organization members - children, youth or adults



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# Closing Comments

**Judy Villeneuve**

Chair of the Regional Culture Committee

Metro Vancouver



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# Register for the Next Workshop

## *Audience Development...where is everyone?*

Thursday, November 21, 2013

1:00 pm - 4:00 pm

Lynn Valley Library – Community Room  
1277 Lynn Valley Rd., North Vancouver

Keynote presenter:

**Heather Redfern**

Executive Director, The Cultch



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Thank You...



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