

Strengthening our Future

AVI Fund Development Strategic Plan
1996-97 to 1998-99

DRAFT

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Fund Development Committee
AIDS Vancouver Island
304-733 Johnson Street
Victoria, BC

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AVI Fund Development Strategic Plan, 1996-97 to 1998-99

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Introduction

The Fund Development Committee of AIDS Vancouver Island (AVI) began meeting in March 1995. The committee has reviewed proposals for fundraising events, worked at developing joint ventures with Victoria Persons With AIDS Society and Victoria AIDS Respite Care Society, and is currently developing a fund development policy. In the fall of 1995, the committee embarked on a strategic planning process in order to prioritize the fundraising activities of the organization over the next three years. This report is the result of the planning process.

The next three years present new challenges and opportunities to AVI's fundraising. Due to increasing concern about deficit reduction, both governments may need to re-examine their support for AIDS service organizations. Donors will be asking more about the use of their donations. Finally, more not-for-profit organizations will be competing for the limited amount of public and private funds. AVI must be able to adapt to changes in revenue without compromising its high level of service.

AVI is strengthening its commitment to all people living with HIV and AIDS on Vancouver Island. Instead of concentrating fundraising efforts in Victoria, we need to plan activities that cater to a broader geographic and demographic base. While the committee concentrated on funds raised from the private sector, it also made recommendations which impact on other areas of the organization.

Throughout the planning process, the fund development committee was guided by three principles:

- i. public accountability for our fundraising endeavours is crucial,
- ii. fundraising endeavours need to be developed in accordance with the demographics of Vancouver Island, and
- iii. cooperation with other individuals and groups is essential to the raising of funds.

In order to develop this plan, the Fund Development Committee reviewed the organization's mission statement, values and priorities as well as the role of the committee. It then analyzed its stakeholders and current situation. From these, it developed questions that are critical to the success of AVI's fund development. These questions were then grouped into areas of strategic concern. The concerns form the basis of the plan.

Strengthening our Future demonstrates the Fund Development Committee's interest in looking towards the future. However, it is only a step in the organization's process of strategic planning. This process will build an organization that will be able to provide programming while adapting to a world in a state of constant economic and demographic change.

AIDS Vancouver Island

Mission Statement

AIDS Vancouver Island is to confront Acquired Immuno-Deficiency Syndrome, prevent its spread through education, support all those infected and affected by the disease, and advocate on their behalf.¹

¹ Orientation and Policy Manual, Vancouver Island AIDS Society - Board of Directors, 1995 p. 18.

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AIDS Vancouver Island

Values

To deal with the challenges facing AIDS Vancouver Island, we first have to clarify the kinds of values which inform our work and our commitment to PWAs. The cornerstones of AVI's programs are education, support and advocacy to people infected and affected by HIV/AIDS. These programs must be informed by values which are: supportive of PWA empowerment, gay-positive, sex-positive, egalitarian, accessible, safe, compassionate and cooperative.²

Priorities

- Health promotion for people living with HIV/AIDS must emphasize a broader range of health needs, especially income security, adequate housing, human rights and dignity, food and traditional and non-traditional therapies.
- PWA participation--must replace isolation.
- New ways must be found to provide support for staff and volunteers who are PWAs.
- We must provide targeted educational programming to men who have sex with men, gay and bisexual youth, intravenous drug users, sex trade workers, women and first Nations people.
- We must establish a broadened funding base and locate new sources of revenue.
- Finally, we must continue to build cooperation with other ASOs in Victoria and up island.³

Fund Development Committee

The Fund Development Committee is responsible for the establishment and maintenance of a strong financial base. This committee has responsibility for all fundraising activities of the society, and ensures effective public relations within the community. The Fund Development Committee has responsibility for the conduct of any fundraising activities sponsored by, or on behalf of, the society.⁴

Key Concerns

- A broad base of funding
- Diverse geographics and demographics
- Cooperation
- Effective working environment

² Strategic Planning Project Interim Report and Discussion Document. AIDS Vancouver Island, October 1995, p. 5.

³ Strategic Planning Project Interim Report and Discussion Document. AIDS Vancouver Island, October 1995, p. 6.

⁴ Orientation and Policy Manual, Vancouver Island AIDS Society - Board of Directors, 1995 p. 31.

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Key Objectives and Directions, 1996-97 to 1998-99

A Broad Base of Funding

Increase the diversity of AVI's funding base in order to assure the continuation and development of programmes at appropriate levels. As support costs increase, more money from non-public sources will be needed.

Background

AVI has had strong support from the public sector. However, the dependency that this creates leaves the organization vulnerable to changes in government policy. In the future, AVI needs to be proactive in soliciting funds from corporations, foundations and individuals as well as the public sector.

Strategies

- Attract donations from foundations and corporations.
- Develop a direct mail campaign targeting individuals.
- Plan fundraising and awareness events throughout the year.
- Provide additional donor incentive.
- Research and develop a planned giving programme.

Diverse Geographics and Demographics

Assure all available sources of funding are secured to accommodate the expanding geographics and demographics of AIDS.

Background

The demographics and geographics of AIDS is changing on Vancouver Island. AVI must initiate programmes to make itself better known to all residents of the island and to develop strategies that address the rising costs of service delivery in the future.

Strategies

- Ensure that all government funding sources are utilized.
- Approach corporations and foundations that reflect the changing geographics and demographics of the occurrence of AIDS.
- Develop a broader base for fund development.

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Key Objectives and Directions, 1996-97 to 1998-99 (cont'd)

Cooperation

Maintain open communications with the fundraising efforts of other ASOs in order to coordinate, not duplicate, efforts. Build both cooperative and agency-specific fundraising efforts.

Background

AVI has participated in several fundraising and awareness initiatives that have benefited the three ASOs in Victoria, e.g. *Victoria Walks for AIDS*. Cooperation about events--both joint and agency-specific--needs to continue in the future.

Strategies

- Work with other ASOs in Victoria and on Vancouver Island to build and strengthen public awareness and fundraising efforts.
- Maintain ongoing communications with other ASOs when scheduling and planning efforts which are agency specific.
- Utilize the strengths of the heightened community awareness of AIDS caused by community events to increase AVI's fundraising efforts.

Effective Working Environment

Assure that AVI has an appropriate organizational structure to enable it to attract additional funds from individuals, corporations and foundations as well as from the public sector.

Background

In order to implement the recommendations of this plan, AVI needs to provide a working environment that facilitates the activities of board and committee members, other volunteers and staff. AVI needs to have a flexible structure to adapt to the changes in the fundraising environment.

Strategies

- Develop appropriate board and committee structure to facilitate corporate and foundation fundraising.
- Assure adequate staffing and support levels to implement fundraising activities.
- Utilize appropriate technological systems to maximize fundraising efforts of the board, committee and staff.
- Assure that appropriate organizational policies and procedures are in place.

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Exhibit 1

Glossary

AIDS: Acquired Immuno-Deficiency Syndrome

ASO: AIDS Service Organizations

AVI: AIDS Vancouver Island

HIV: Human Immuno-Deficiency Virus-the virus linked to AIDS

PWA or PLWA: Person(s) living with AIDS

Private funding: Monies raised from corporate, foundation and individual sources

Public funding: Monies raised from government sources

Queer: Gay, lesbian and transgendered individuals

3 levels: Federal, provincial and municipal

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Exhibit 2

Stakeholders

PWAs

spouses and families

queer community

heterosexual community

government (3 levels)

health care system and its workers

other ASOs

right wing

corporations

donors

AVI's suppliers

volunteers

religious groups

media

educators

bereaved

IV drug users

politicians (3 levels)

street involved

sex trade

First Nations

immigrant population

hemophiliacs

other charities

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Exhibit 3

Situational Analysis

Strengths

10-year history
high profile within the community
strong administration
assets
up-to-date equipment and technology
strong, high-quality volunteer base
good database
good relationship with government
not suffering from a disaffected community
highly motivated staff

Weaknesses

small community
high staff turnover
underpaid staff
intellectual deficit
physical space
high stress level in volunteers and staff
perceived underrepresentation of groups
personal agendas
lack of professionalism
differences in perception of organization
shortage of funds and resources
high growth

Opportunities

growing awareness of AIDS
new geographic and demographic communities to draw from
increased number of small businesses, people working at home and job sharing
affluent community
enthusiasm - large number of approved third party opportunities
political clout over a political disease

Threats

difficulty forecasting government support
increased number of charities - all concerned with fundraising
older community
small size of community
large number of AIDS events
AIDS has a high profile, not AVI
lack of control of enthusiasm - possible P.R. difficulties

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Exhibit 4

Issues facing AVI's Fund Development

Sources of Funding

With uncertain national and provincial funding, what are AVI's alternative sources to provide programs at appropriate levels?

How can we broaden our fundraising target markets?

Who are our underidentified potential funders (corporate, foundation and individual) and how do we reach them?

How do we develop the criteria for choosing sponsors?

How can AVI tap into stakeholder target markets that are not being overtaxed in the AIDS movement? Can we use our strengths as an organization to capitalize on these markets?

How can we use the opportunities that we identified to better access the community at large?

How do we raise our profile with potential funders?

What areas (i.e. special events, private donations, corporate/government funding) take what priority? Why? How do we identify them?

Changing Demographics

How can we take advantage of new areas of funding as our client base changes (i.e. increase in street-involved cases)?

How do we sustain our fundraising efforts as the demographics of AIDS is changing?

How do we legitimize funding AIDS organizations if the clientele is served by other government-funded services?

What effect does the longer life span of clients (due to improvements in treatment and lifestyle) have on fund development?

How do we reflect AVI's island-wide mandate in our fundraising efforts?

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Exhibit 4

Issues facing AVI's Fund Development

(cont'd)

Organizational Structure

How do we prepare for financial fluctuations in public and/or private funding?

How do we identify areas of overlapping services and funding internally and within ASOs so that we can trim and shift responsibilities?

How do we increase AVI's profile on the island?

How do we justify our distribution of funds to a broadening group of supporters?

How can ASOs in Victoria and on Vancouver Island work closer to generate maximum funds and not overlap in fundraising approaches? How do we accommodate different levels of participation?

What kind of structure (committee structure, committee membership, staffing) do we require in order to operate most effectively?

How do we balance volunteer and paid staff responsibilities for fundraising events?

How do we avoid volunteer and staff burn-out?

Who "owns" the database being built from the walk and lottery?

How do we tender contract jobs?

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Exhibit 5

Committee Membership

Alan C. Elder, Chair

Stephanie Bogaert

Norman Brulotte

Dianne Kennedy

Don Mathewson

Liam Morton

Glen Peers

Erik Ages, Communications and Fund Development Officer

Ruthann Tucker, Executive Director (guest - 7 March 1996)

Meetings Dates

2 November 1995

5 December 1995

30 January 1996

7 February 1996

29 February 1996

7 March 1996

21 March 1996