



FUNDRAISING COMMITTEE

Terms of Reference

[Abstract](#)

The Fundraising Committee develops and delivers the GUILD's Fundraising and Stewardship requirement to enable/support the organization's charitable programs and operations.

VERSION 4 - February 2023

FUNDRAISING COMMITTEE

TERMS OF REFERENCE

REVISION HISTORY

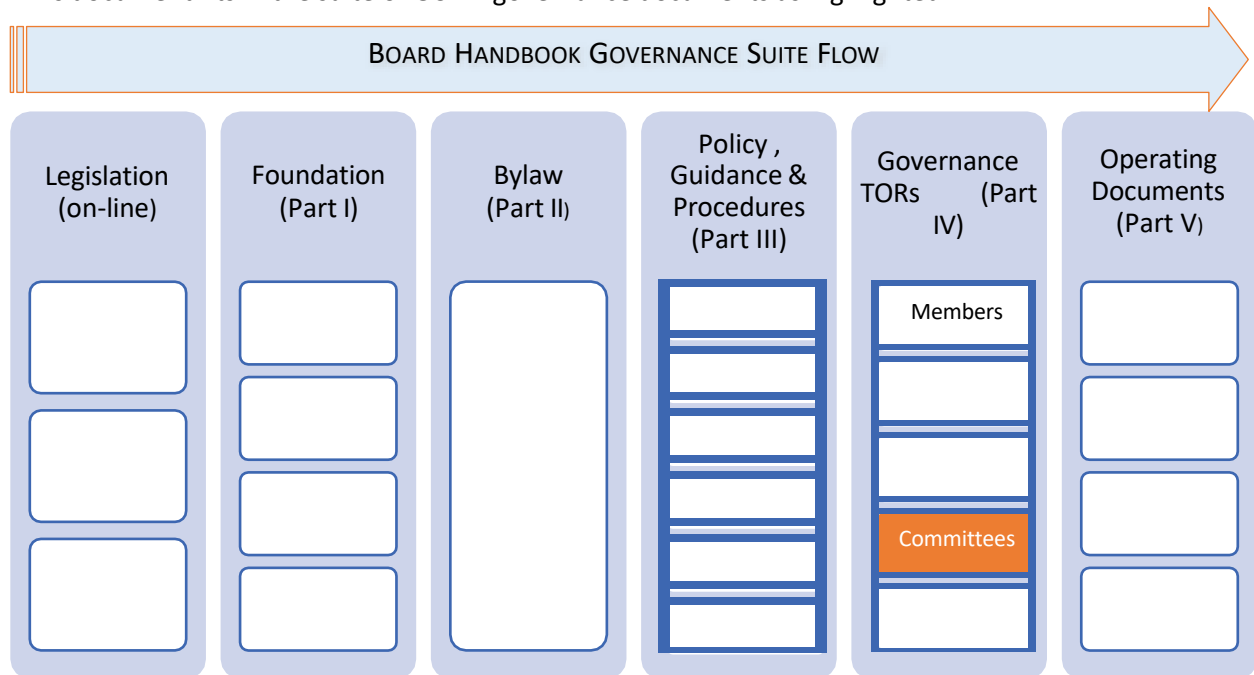
Version	Issue Date	Author	Reason for Change
Draftv1.1	November 2019	Thomas Burnie	Initial draft for comments
Draftv2.1	November 2019	Thomas Burnie	Minor formatting changes
Draftv2.2	November 2020	Thomas Burnie	Added the CFO and Marketing Committee
Draftv3.1	January 2021	Thomas Burnie	Removed investment function, updated RAM, and linked committee purpose to the applicable GUILD objective
Draftv3.2	February 2021	Thomas Burnie	Major editorial changes
Draftv4.1	November 2022	James Follwell	Complete review and update to separate Fundraising (an enabling activity) from Awareness (a charitable program and object). Key updates include a more expansive explanation of fundraising scope and options and including a formal stewardship program to guarantee donor recognition. First draft sent to select key persons for comments.
Draft4.2		James Follwell	Updates to content from Executive review
Draft4.3		James Follwell	Updates from Board review and taking some TOR content out to create a Fundraising SOP (the How)

APPROVALS

Version	Issue Date	Approving Authority	Comment
1.0	9 November 2019	Board of Directors	Provisional Use
2.0	28 February 2020	Board of Directors	Minor formatting changes
3.0	15 April 2021	Board of Directors	Operating Document
	17 May 2022	Executive Meeting	Directs the investigation of separating fundraising out of awareness committee to better focus both
	4 November 2022	Board of Directors	The separation of the current Fundraising TOR approved. A new Awareness Committee TOR will be developed. A new Fundraising TOR will also be developed
4.0	February 2023	Board of Directors	Approved for use

GOVERNANCE DOCUMENT FLOW

This document fits in the suite of GUILD governance documents as highlighted.



PURPOSE

Created under the authority of the Guild of The Royal Canadian Dragoons (the Guild) By-law Section 44, the Fundraising Committee develops and delivers the Guild's Fundraising and Stewardship requirement to enable/support the organization's charitable programs and operations. It is considered a key enabling Committee for the Corporation.

Committee plans, decisions and recommendations are subject to Board approval.

MANDATE

The Fundraising Committee is established with the mandate of generating funds for the execution of our charitable programs and the long-term safeguarding of the corporation's objects. It will also execute the Guild's Stewardship activity to ensure donors are properly recognized and integrated into Regimental Family activities as appropriate.

COMPOSITION

The Director for Fundraising has overall responsibility for all fundraising activities of the corporation. As a minimum, the committee shall comprise the Guild Director for Fundraising (Chairperson), a Director (or volunteer) assigned as the Stewardship Officer, The Director of Strategy & Business Planning, a representative of the Guild Awareness Committee, and representatives from the Association and Regiment.

As required, the committee is responsible for identifying and recruiting any non-designated Guild Directors or external contributors to create an effective team for the execution of their functional area. Additionally, the Committee can/should also include regional representatives to provide broader (nationally and where possible internationally) representation.

The Guild President, Regimental Patron and Chief Financial Officer (CFO) shall contribute in an advisory/mentorship and supporting capacity. Their involvement is a key enabler to maximizing our fundraising potential and connecting with a wider group of potential major donors.

The Board of Directors, by resolution, must approve the hiring of paid professionals and may remove any Committee member (By-law, Section 44.)

COMMITTEE RELATIONS FOR OPERATIONS

The Fundraising Committee can be seen as a key enabler of efforts across the Guild by leveraging the ongoing activities/work of the corporation to set conditions for successful fundraising. To this end, Fundraising will work with all our charitable program committees to ensure alignment and mutually supporting efforts are optimized.

The connection with the Awareness Committee is a key enabler for successful fundraising to ensure that effective and consistent multimedia themes, messages and products are made available to support efforts. As a general goal, products should be developed for multi-purpose use by being developed as one coordinated and overarching effort, led by the Awareness Committee while meeting the requirements of the Fundraising Committee.

COMMITTEE RESPONSIBILITIES AND FUNCTIONS

RESPONSIBILITIES AND FUNCTIONS

The Fundraising Committee is responsible for all aspects of fundraising and stewardship as authorized by the Board of Directors. It shall meet at the call of the chairperson at least quarterly or as required to conduct its work.

Specifically, this committee has three main and inter-related functions:

- Developing and maintaining the overarching guidance, goals and action plans for effective fundraising;
- Identifying, recruiting and cultivating donors by organizing/executing fundraising activities to enable the generation of income for Guild charitable and administrative operations;
- Planning and conducting a Stewardship program to recognize and maintain effective contact with donors; and
- Supporting the CFO in managing and growing the Guild Investment Fund to include the generation of capital to create self-sufficient and enduring income.

RESPONSIBILITY ASSIGNMENT MATRIX

The table listed below identifies the assignment of major Fundraising Committee responsibilities against the key functions. Subsequent Sections of this TOR will identify specific tasks and approaches for successful fundraising and stewardship in the context of the Guild Charter.

Legend:

R = Responsible for the correct and thorough completion of the deliverable or task, the one who ensures the task prerequisites are met and who delegates the work to those responsible.

A = Approval/Authority

S = Support the activity by participating as required, providing input, coordination and alignment.

Fundraising Committee Deliverables and Tasks	Board	Fundraising Chair	President & Patron	Awareness Cmte	Regimental Rep	Association Rep	CFO	Dir Strategy & BP	Advisors
Planning									
Develop, manage, align and integrate Fundraising, Investment Fund and Stewardship plans	A	R	S	S	S	S	S	A	S
Establish fundraising milestones, processes and options to meet requirements and goals	A	R	S	S			S		S
Manage plans and make recommendations for the investment and/or disbursement of Investment Funds	A	R	S				R		S
Create and produce marketing strategies to support fundraising plans		A	S	R	S	S			S
Activities									
Develop, maintain and deliver detailed descriptions of current and planned giving options for Guild use	A	R	S	S		S			S
Recruit potential donors	S	R	S	S	S	S			S
Identify, plan, coordinate and conduct fundraising activities across the Regimental Family and general public	A	R		S	S	S		S	S
Create and produce marketing and awareness tools to enhance fundraising activities/events		A		R	S	S			S
Stewardship									
Develop, integrate and implement Guild Stewardship Activities	A	R	S	S				S	
Manage a robust donor recognition program	A	R	S	S				S	

PLANNING

Fundraising must be planned and adjusted to ensure that funds are made available to meet our charitable program goals and corporate operations. To this end, the Chair of the Fundraising Committee is a key member of the Business Planning Team to ensure fundraising plans and objectives are integrated into the Guild's plan. The Fundraising Committee will make plans and propose cost estimates for the resources

needed to execute their plan which shall be incorporated into the Guild's Business Plan – it takes money to make money. These plans will then be implemented by the Committee.

Key Planning tasks for the Fundraising Committee include (but not limited to):

- Establishing and maintaining detailed processes and schedules for fundraising and stewardship management;
- Creating an annual fundraising plan and cost proposal as an integral part of the Business Planning Process;
- Identifying the types of giving to be offered by the Guild;
- Identify potential donor audiences and coordinate their participation in fundraising events;
- Identifying/refining Stewardship plans to meet goals;
- Coordinating with other Committees, (especially the Awareness Committee to create the best messaging and marketing framework to maximize fundraising potential; and
- Supporting Guild Investment Fund planning.

FUNDRAISING MANAGEMENT

Fundraising management is the physical implementation of fundraising plans to generate funds for the Guild's charitable programs and operations. This can be achieved through a number of diverse activities and events but shall always showcase the Regiment and Regimental Family. It will also demonstrate the positive affect of any potential donation and create a strong sense of belonging. The Guild will use both active and passive methods for fundraising that will be centrally managed by the Fundraising Committee.

During the implementation of fundraising activities, the Fundraising Committee shall:

- Establish comprehensive narratives for the different types of giving offered by the Guild (cash, bequeaths, in-kind) including a concept for supporting them;
- Deliver giving options and advice to potential donors as identified;
- Recruit, train and support Fundraising representatives and agents on behalf of the Guild Board and President;
- Select, plan and execute suitable events to raise funds within current charitable practices and existing laws;
- Keep detailed and permanent records of donations and stewardship actions;
- Manage the activities of the Stewardship Team to ensure our donors continue to be recognized and included as an extended part of the broader Regimental Family;
- Report annually and periodically to the Guild Board to include the outcome of fundraising efforts, and progress against fundraising goals;
- With the CFO and Treasurer, oversee the operation of any professional organization selected to manage fundraising and donations; and
- Periodically review these responsibilities and propose any changes to the Guild Board for approval.

TYPES OF GIVING

As the Guild is a registered charitable organization, all donations are eligible for a tax receipt. The Fundraising Committee is responsible for developing, maintaining and describing The Guild's giving options.

There are two primary ways to give: Current and Planned and each has different options that will be developed and maintained by the Fundraising Committee.

EVENTS

Throughout the year, the Fundraising Committee and its representatives will employ a mix of more formal methods to attract donors to meet planned fundraising goals. The goal during a typical year is that the Guild will run a minimum 1 major fundraising event and 2 minor activities. The potential range of events that can be dedicated to fundraising can include, but is not limited to:

MINOR Event examples:

- Meetings, briefings and information sessions;
- Distribution of Fundraising newsletters and information (mail, electronic, multimedia);
- 50/50 and other draws/lotteries and raffles; and
- Sports events like golf tournaments.

MAJOR Event examples:

- Operation CONNECTION – connecting with Canadians (visits to field training, plus);
- Regimental Family Dinners and ceremonies;
- Fundraising Galas; and
- VIP Hosted fundraising events.

STEWARDSHIP

SCOPE

Stewardship is an integral part of the Guild's Fundraising Committee to ensure effective donor relations and recognition is maintained. It consistently recognizes and thanks donors as well as making them feel closer to the Regimental Family. Stewardship aims to provide a connection between donors and recipients by providing the tools, mechanisms, events and opportunities for donors to experience the joy of their gifts.

The Stewardship team, led by the Stewardship Officer (who is a Guild Director) and supported by the Awareness Committee, is responsible for designing, implementing and operating the Guild's centralized gift acknowledgement and donor correspondence program. Additionally, the Stewardship team is an integral part of planning/executing all fundraising activities.

The incumbent will work in accordance with Guild Policies and Procedures, under the general direction of the Chair of the Fundraising Committee. The Stewardship Officer also works in close conjunction with the Guild President, Vice-Presidents, Coordinator and Secretary/Treasurer as well as the Patron.

TASKS

The Stewardship team is responsible for executing the following activities as coordinated with the Fundraising Committee and approved by the Board of Directors:

- Create and maintain a Stewardship manual for the effective operation of the function;
- Manage, record and confirm all donations;

- Develop and execute a donor recognition plan for immediate and long-term recognition of donors;
- In close cooperation with the Guild Communications Team, manage and maintain the contact list for donors in order to create/enhance shared awareness with donors;
- Manage recognition requirements for the Guild's Wall of Recognition in close cooperation with the Guild Coordinator;
- Maintain and provide the donor list for potential publication on media sites and inclusion in correspondence and publications; and
- Make recommendations on the invitation of donors to Guild/Unit functions (e.g. Leeuwarden, Liefontein) as part of the donor recognition to include the drafting and distribution of invitations.

ADMINISTRATION, REPORTS AND RETURNS

The Fundraising Committee is responsible for submitting its reports and returns to the Board (in writing through the Guild Coordinator unless noted otherwise) as follows:

- a. All meeting Records of Decision;
- b. Written After Action Reports after each fundraising event;
- c. Committee progress reports at quarterly Board Meetings (chairs will also verbally provide their report at the meeting);
- d. Annual work/activity plan and budget forecasts for fundraising and stewardship (through the Guild Business Planner);
- e. Review the performance of the fundraising and donation management process and make improvement recommendations to the Guild;
- f. Submit a Quarterly Donor report with contact information for updating the donor wall, website and email distribution List, including correspondence recommendations for further engagement; and
- g. Annual Committee report on the past year's fundraising activities to identify the Committee performance/contribution to the Guild's overall priorities and goals (and provide a verbal summary at the AGM).