

Seniors Assisted Transportation Society of Greater Edmonton Fund Development Plan Board Meeting - June 17, 2008

The SATS currently spends a great deal of time and effort raising funds through a number of small events, plus seeking funds through writing grant applications and proposals. To build a fund development strategy that will grow to raise the \$250,000 required annually (to serve 1,000 users of the service) the organization will need to focus its energies on a model such as the one outlined below.

1. The organization needs to commit to operating a casino as frequently as possible and through that generate funds that can be used annually, approximately \$40,000. (Note: funds from each casino will need to be split over more than one fiscal year).
2. The organization needs to increase charitable giving from individuals over the next 30 months to maximize its ability to apply for funding under the Alberta Community Spirits program. That program will allow charitable organizations to apply for matching (but not dollar for dollar) funds in the fall of 2008, 2009 and 2010, based on the level of charitable donations received from individuals in the most recently completed fiscal year. So in the fall of 2008 SATS can apply for funds based on the amount of individual charitable donations received in its year ending December 31, 2007. Funds raised through events, from businesses, government and foundations do not count in this effort.
3. The organization needs to focus their energies on creating a "signature event" that can raise a net of \$40,000. In order to achieve this level of success the organization may need to find a lead partner, one that can contribute manpower, expertise and possibly financial resources (both in the form of sponsorship and perhaps risk capital). This might be a group like the AMA, a service club or a business organization. Letting the Public Relations agency the organization is working with on other the volunteer recruitment initiative may generate some leads in this area.
4. Lastly, the organization should pursue the United Way of the Alberta Capital Region and the City of Edmonton with a focus on securing annual operating support of approximately \$80,000 per year combined from the two organizations. The United Way has declared five priority areas they will focus on for the next five years. One of those five fits the mandate of SATS. "**Seniors and Their Families:** Focus on community building initiatives to support seniors and their families. In Edmonton the senior demographic (those age 65+) is rapidly growing, increasing by 51% from 1991 to 2001. (Edmonton Socio-Economic Outlook 2005-2010)."

Success in pursuing these four key strategies would generate the \$250,000 required to annually serve 1,000 individuals.

The organization should also continue to pursue funding from established funders such as the Wild Rose Foundation, the Community Initiatives Program with the Province of Alberta (part of the Alberta Lottery Funds), the Edmonton Community Foundation, the New Horizons program and others. This will be important both while building the program outlined above and after to continue efforts to grow and serve a larger portion of the population with a need for the services provided.

It should be noted that the organization will also receive earned income from the sale of membership and tickets (used by the clients in booking their rides). That earned income is forecasted to reach \$60,000 when 1,000 seniors are being served.

Note: The financial targets indicated above are flexible; securing more from one area can reduce the amount needed from another. The organization should strive to have a mix of sources such that annual ups and downs in any one area can potentially be made up in another.

Seniors Assisted Transportation Society of Greater Edmonton Sample Case for Support March 18, 2008

It is widely recognized that aging in place is the preferred strategy for most seniors. This means living in their homes, staying in and engaged in the community for as long as practical. Alberta Seniors has incorporated this into their business plan along with recognizing the importance of independence to the well-being of seniors. In the Alberta Seniors business plan (related to goal number 5) they state, "Participating in the community means being able to work, volunteer, take advantage of educational and recreational opportunities, and engage in other chosen activities. Communities play a key role in creating tolerant, accessible and supportive environments. Albertans benefit when all seniors and persons with disabilities are valued for their contributions and fully participate in the social and economic life of the province. The Ministry works with partners to create awareness of barriers and to identify strategies to enable all seniors and persons with disabilities to participate in every aspect of Alberta society."

In 1997, Alberta Health and Wellness established a Policy Advisory Committee on Long Term Care, two years later their report, "Healthy Aging: New Directions for Care" acknowledged the world wide trend to assist people in staying in their homes for as long as possible. That report put into motion many of the changes we are seeing today. That report identified the following vision:

"Our vision for aging in the 21st century is a society where all Albertans:

- Are treated with respect and dignity
- Have access to information which allows them to make responsible choices regarding their health and well-being
- Can achieve quality living, supported by relatives, friends and community networks, and by responsive services and settings."

Along with these official Alberta policy directions comes the very real growth of our senior population. The number of individuals living in Edmonton aged 85 and over (at the time of the 2006 census) was 10,620 (an increase of 28% from 2001) and the population for those aged 75 – 84 was 31,345 (an increase of 20% from 2001). For comparison purposes the population of the City grew by 10% over that 5 year period. Older seniors are the fastest growing group in the city. These are the primary age groups of members/clients for SATS.

The need for the door-through-door services provided by SATS is also supported by the work of The Canadian National Council on Aging. They identify that, "People who remain actively engaged in life and socially connected to those around them are happier, in better physical and mental health and more able to cope with change than those who are less engaged and connected. Social isolation increases the risk of poor health, whereas the presence of supportive social relations (families, friends, participation in local organizations or church groups) has a positive effect on health." They further identify that, "...transportation is the passport to independent living for most seniors. Safe, convenient, affordable transportation helps reduce isolation and provides access to services, recreation and leisure pursuits. At least half of the seniors in one survey said they rarely or never went out to community functions, ate out or visited friends because of transportation problems. Clearly transportation should be an integral part of all program designed to serve seniors."

According to the Participation and Activity Limitation Survey, 2001 conducted by Statistics Canada mobility-related disabilities are a significant issue. 23.3% of seniors aged 65 to 74 years reported a mobility-related disability; 39.5% of seniors aged 75 to 84 and 57.7% of seniors aged 85 and older reported disability problems.

The growth in our senior population, the proportion of those older seniors with mobility related disabilities and the fact that “research shows that, for most Americans, life expectancy now exceeds driving expectancy by 7 to 10 years” (no similar information has been found for Canada) combine to make a very strong statement about the need for this service to help keep seniors in their homes and engaged in community, a very significant quality of life consideration for many of them.

Financial modeling for SATS, developed as part their business operating model, shows that the organizations should build its fund development efforts around the capacity to serve 1,000 clients annually. The forecast shows that the organization will need to raise \$250 per person served annually and SATS should therefore be building a fund development strategy that can grow to generate \$250,000 per year.

10 seniors can annually be provided this valuable service with the support of one volunteer drive and financial support in the amount of \$2,500.

Note:

The case for support should be enhanced as needed to meet the requirements of the funder (using the strategic plan, the business plan and other supporting material). The City of Edmonton commissioned a report on the issue of aging in place and the implications for the City and others with respect to the supports needed to make aging in place work. That report is not out as of the writing of this document. Once it is out it should be reviewed for supporting information on the need for services provided by SATS.

Additionally, it would be very helpful to develop several snapshots of those being served, so that you can bring the request for support to life, putting an individual face to those being served, this snap shot can include comments from family members, medical personnel and others who have seen the benefit to the specific individual.

The case may also grow to include details about funding being requested in support of special projects or initiatives.

Signature Event

SATS needs to either attract an organization that would like to run a special event that could be built as their own with the proceeds from the event being donated to SATS or SATS must make one of their current events (or select a new one) that can attract sponsorship dollars as well as generate net revenue from the event itself. A title sponsor to a small event may be willing to commit \$5,000 to a growing, publicized event that matches up with their marketing needs. Additional sponsorships at the \$2,500, \$1,000 and \$500 dollar level may make it possible (over time) to raise \$20,000 in sponsorship dollars from the event.

Examples of Organizations running events to raise support for charitable causes are many. The Alberta Motor Dealers have been running a golf tournament to raise funds for Special Olympics Alberta for the past 23 years. The CIBC Run for the Cure raises funds for breast cancer research, but CIBC owns the event. Of course there are many examples of local groups and businesses running events to support the United Way and Stollery Children's Hospital Foundation.

SATS should spend some time during the current year exploring the possibilities of support from local businesses and service clubs that might take advantage of having an option to create a signature event. Include this as an option in your solicitation package.

United Way

Now that the United Way of the Alberta Capital Region has declared seniors to be one of five priority areas for the next five years it is time to meet again with senior United Way officials to share your story and case for support. Meetings with the United Way in the past have not lead to a commitment of support, however, SATS is in a much better position to articulate its case for support and to show the financial resources needed to deliver this critical service. It would make sense to request a meeting before to seek guidance on how to best prepare an application for support.

City of Edmonton

The City of Edmonton released a report entitled "Aging in Place: A Neighborhood Strategy" in the spring of 2008. In that report it stated that, "Transportation is the foremost factor affecting isolation. A number of barriers impede seniors' ability to use the public transit system and other modes of transportation such as assisted driver programs and DATS". It then went on to recommend that the City pursue the recommendations put forward by the Steering Committee on Seniors' Transportation. The report identifies the need to increase the opportunities for door-to-door transportation by promoting and subsidizing assisted driver services and facilitating and supporting more community-based programs where volunteers drive seniors (along with other recommendations).

Province of Alberta

In May 2008 the Government of Alberta Minister of Seniors and Community Supports announced the establishment of a Demographic Planning Commission that will advise the Ministry on the needs of future seniors. The commission is charged with looking at the shared roles of governments, communities, families and individuals in meeting the needs of future seniors as well as the principals and values underlying these roles. The commission will also look into long-term sustainability for those programs and services.

Charitable Gifts, Donations and Sponsorships

Establishing a Fund Development Committee was identified in the Business Plan that was present to SATS in December 2007. That committee needs to be made up of people that are willing to identify prospects for support and take the lead in making presentations to them, supported by the Executive Director. The Committee should also be responsible for taking the lead in discussions with the United Way and City of Edmonton in pursuit of securing annual operating funds. The Committee should also be responsible for special events and the casino.

This needs to be a large committee and must include a majority of members that are not on the Board of Directors. This needs to happen so that the work load becomes manageable and so that the Board can also give attention to them many other priorities of SATS.

Having sub committees will ensure that abilities and interests of people willing to serve can be best utilized. Many people that like working on special event fund raising prefer not to be involved in the direct solicitation of individuals, businesses or service organizations. As well the people that might form a sub committee to work on building an ongoing relationship with the United Way and the City will need to have a much deeper level of understanding about the organization and people it serves since those two funders will have very significant application and reporting needs.

Lastly, the Executive Director should continue to search out funding opportunities from other funders and keep track of when SATS is eligible to apply again for funds (i.e. Wild Rose, CIP, Edmonton Community Foundation, New Horizons and others).

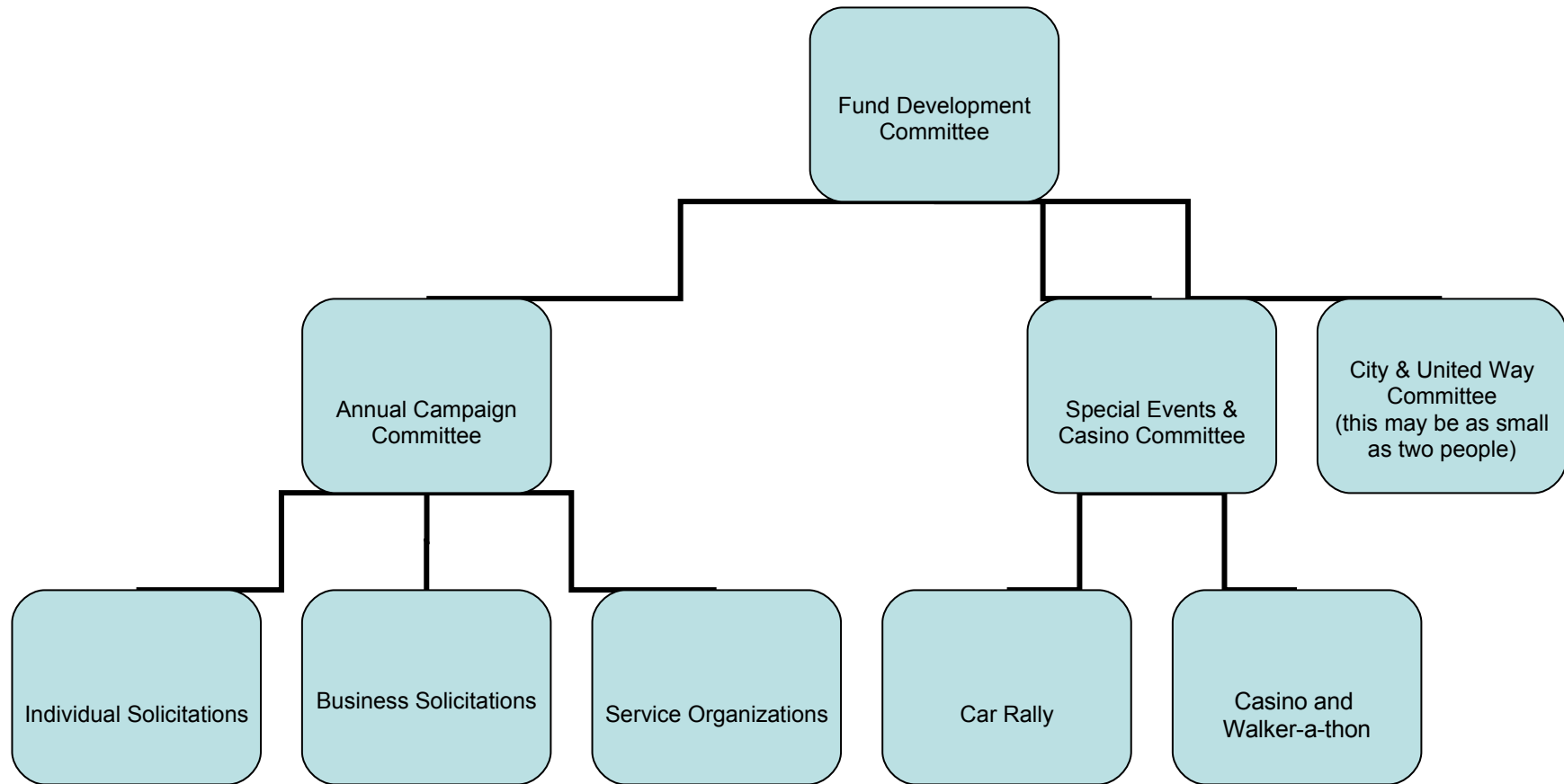
SATS has been operating special events and casino fundraising, so the requirement for those areas will not be covered in this plan.

An annual campaign should be planned for the late winter/early spring of each year. This timing will avoid conflict with the annual United Way campaign and with a September special event.

The Annual Campaign will need to focus on building a base of donors (individuals, businesses and service organizations that can be approached year after year to provide and renew support to ensure seniors are able to have access to the door-through-door service they require.

The campaign will start small and grow as new donors are added each year. Recent changes to the level of tax credit available for all donations over \$200 (in Alberta) and the Community Spirits program should help to make starting the program easier. Since the initial number of donors is expected to be relatively small every effort should be made to have an in person ask for all donors over a very small amount. This will allow SATS to learn about existing donor motivation and help to uncover leads for additional prospects.

Possible SATS Fund Development Committee Structure



Note: It will take time to recruit the number of volunteers to have the number of sub committees indicated. However, if efforts are not made to recruit enough people those serving will burn out quickly.

SATS Draft Fund Development Activity Timeline

	January	February	March	April	May	June	July	August	September	October	November	December
United Way	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒
City of Edmonton												
Grant Applications	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒	⇒
Casino												
Car Rally					⇒	⇒	⇒	⇒	⇒			
Walker-a-thon	⇒	⇒	⇒									.
Baseball Alberta					⇒	⇒	⇒	⇒				
Annual Campaign		⇒	⇒	⇒	⇒	⇒						

Notes:

1. As a signature event gets established the involvement with Alberta Baseball should end.
2. Once the City has released its report work should start in earnest to find an avenue to apply for ongoing operational support
3. The Annual Campaign should start in full force in 2009. For 2008 the emphasis should be put on identifying and soliciting businesses and service organization

After those who are already giving, who might some of our best prospects be?

From a business organization point of view organizations that have more decision making locally and who have a reason to be affiliated with seniors are most likely to support.

Servus Credit Union has seniors as one of their five priority areas for community investment.

The Alberta Motor Association (AMA) they are getting to know your organization better thanks to their involvement in the video production. They could be a good prospect for a title sponsorship on an event or even as an organization that might want to create a special event to support both some of their existing programs and a charity like SATS.

The Edmonton Real Estate Board and its Foundation may also be a good prospect. They like to work with local charities and with causes that fit their industry profile. Many of the seniors SATS has as clients have or will soon sell their existing homes as they move to facilities that better suit their needs. If not the Real Estate Board or its Foundation they may be an agency that would like to be more directly involved.

Dynacare Kasper Medical Laboratories may also be an organization that would like to be seen to be supporting seniors in their efforts to stay in the community. They perform many of the medical tests that seniors need to take.

Local branches of financial institutions and retail stores that are located close to large senior populations may want to support the efforts. Many branch managers have decision making capabilities for donations and sponsorships that are in the \$500 to \$1,000 level.

Service Organizations may also be a prospect to support SATS on an annual basis. Many of their members are baby boomers or older and have or will soon be facing the challenges of dealing with the issues addressed by SATS. Service clubs like the Lions Club have a long affiliation with helping seniors. Rotary Clubs in the Edmonton area can be tapped for support, some clubs like to have long-term relationships and other clubs prefer to spread their support around. Engaging the club in a specific geographical area often helps to strengthen the connection.

The Foresters, while a small group, have a fraternal membership that is very much an aging portion of our population. Finding a member of the organization and working together on a submission will improve the chances for success (as it will with most service clubs).

Lastly, watch for leads in the local papers and in other forums. Many small to medium sized businesses, locally owned, have key decision makers that may be personally impacted by the needs of their parents (or have employees that are facing the squeeze). Many of these entrepreneurs have the ability to give to support a charity that helps to address such a close personal issue.

On an individual basis it's all about asking, asking for referrals, asking if they might be willing to help, telling the story that the service being provided is made possible thanks to the generosity of volunteers (drivers and others) and donated financial support.