

Fundraising That Works!

Heather Rumball
President
Toronto Public Library Foundation



Toronto's Library. Absolutely Vital.

Presentation Overview

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- 3 Relationship to Friends
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Friends Group or Foundation

- To incorporate or not to incorporate
- Charity or non-profit
- Registered Charity or Public Foundation

Incorporation

Reference: Carters Charity Law Bulletin No. 96, July 19, 2006
<http://www.carters.ca/pub/bulletin/charity/2006/chylb96.pdf>

Incorporated

- » Capital or non-share capital corporations
- » Separate legal entity
- » Can own property
- » Protection from liability

Unincorporated association

- » Not a separate entity
- » Cannot own property in its own name
- » Exposes to personal liability

Charitable vs. Non-profit

Non-share capital corporations

1. Not-for-profit

- » Sports clubs, service clubs, non-profit housing
- » Income tax exempt
- » Directors can receive remuneration

2. Registered charity

- a) Charitable organization
- b) Public foundation
- c) Private foundation
 - » Identified charitable purposes
 - » Income tax exempt
 - » Can issue official tax receipts
 - » Directors cannot receive remuneration (Ontario)

Registered Charity vs. Public Foundation

1. Board Composition
2. Source of Funding
3. Charity's Activities

< 50% can be related

< 50% from one donor

a) Charitable organization

⇒ charitable activities

+/- related businesses

e.g. bookstores/book sales, conferences, speaker events, funding literacy programs

b) Foundation

⇒ traditionally just fundraising

e.g. direct mail, sponsorships

Debate: what constitutes charitable activity vs. fundraising activity

Steps to Set up

(Reference?)

I. Incorporation

- Through provincial **or** federal government
- If feds, submit to Industry Canada:
 - Copies of application for incorporation
 - Unsigned copies of proposes by-laws
- Adoption of by-laws, etc. plus registration in Ontario

II. Charitable registration (CRA)

(Charity or Public Foundation)

- Application to CRA
- Copy of letters patent and by-laws
- Public Guardian and Trustee

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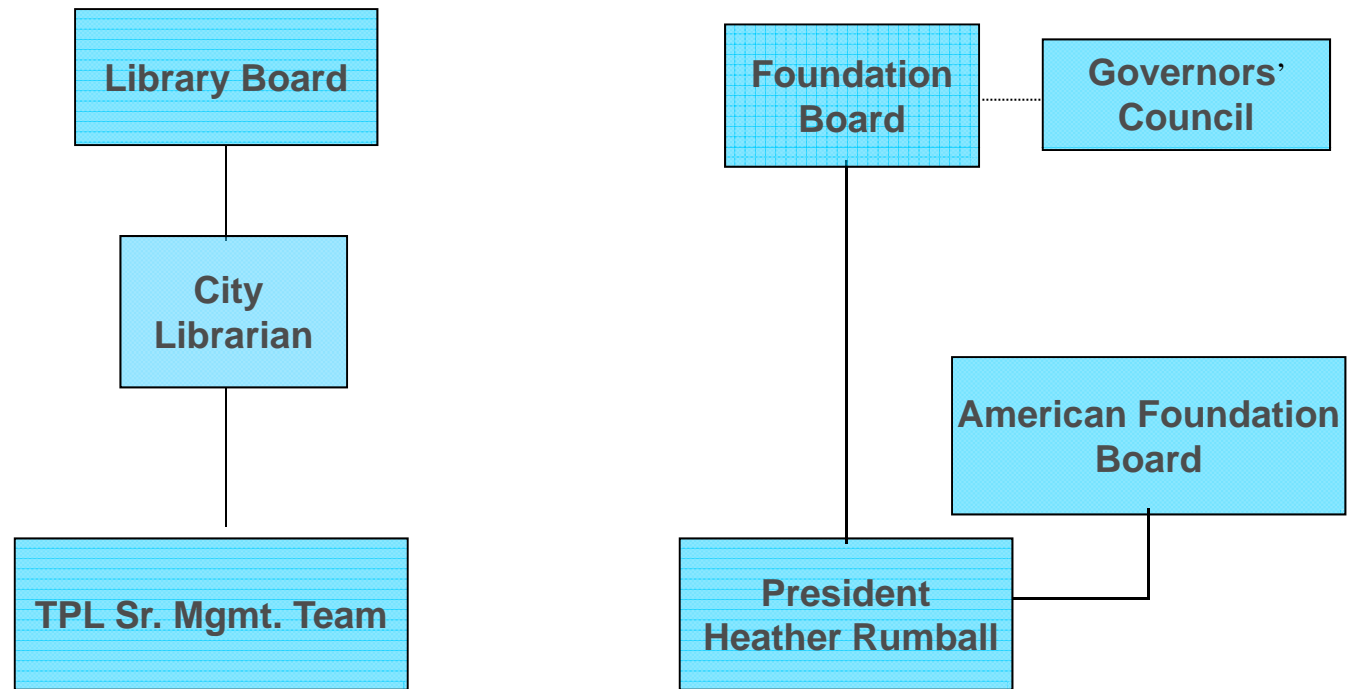
About Toronto Public Library Foundation

- A separately incorporated charitable organization
- **Mandate:** to raise funds to enhance Toronto Public Library
- **Vision:** to be a pre-eminent fundraising force in Toronto



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Relationship to TPL



Foundation History

1997 Established to support Metro Toronto Reference Library

1998 Mandate broadened with amalgamation of Toronto

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Relationship to Friends Groups

Under Foundation (incorporated)

- Osborne
 - Arthur Conan Doyle
 - Merril
- Foundation issues tax receipts

Independent (unincorporated)

- North & South
- Issue own tax receipts

Mandates

Foundation

➤ Fundraising

I. Annual Campaign

- Corporate Sponsorship
- Major Individual Giving
- Community Giving
- Foundation Grants
- Special Events
- Planned Giving/Endowments
- Friends
- Interest/Investment Income/Other (book bags??)

II. Capital Campaign

- TRL \$30M revitalization

Friends

- **North & South** – book stores, membership
- **Osborne** – charitable activity, membership, merchandise sales, fundraising (from members +)
- **ACD** – charitable activity, membership, merchandise sales, fundraising (from members)
- **Merril** – charitable activity, membership, merchandise sales, fundraising (from members)

Similarities & Differences

Foundation

- Professionally-staffed
(= higher expense:revenue ratio)
- Broad focus
- Many fundraising activities
+/- charitable activities

Friends

- Volunteer-based
(= lower expense:revenue ratio)
- Narrower focus
- Charitable +/- fundraising activities

Challenges & Opportunities

Challenges

- Who “owns” donors
- Who drives mandate; how does it all fit together

Opportunities

- Mutually reinforcing/complementary
- Broadens opportunities to give/receive donations

Achievements

Foundation

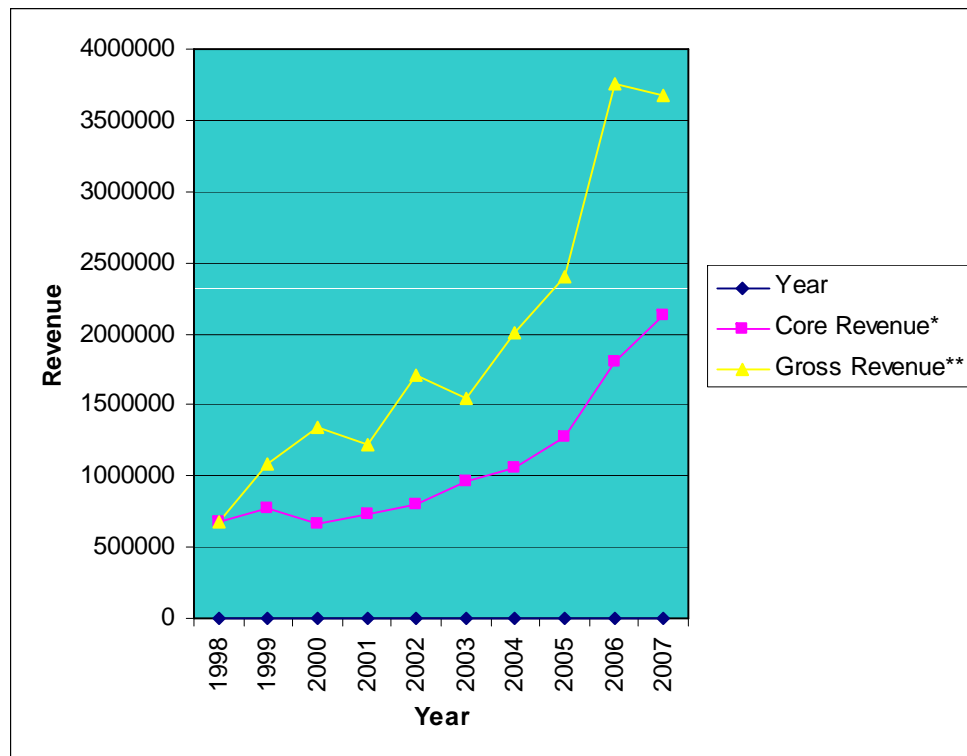
- \$3M Annually
- \$33M Cumulative

Friends

- \$X - \$Y Annually
- \$1M+ Cumulative

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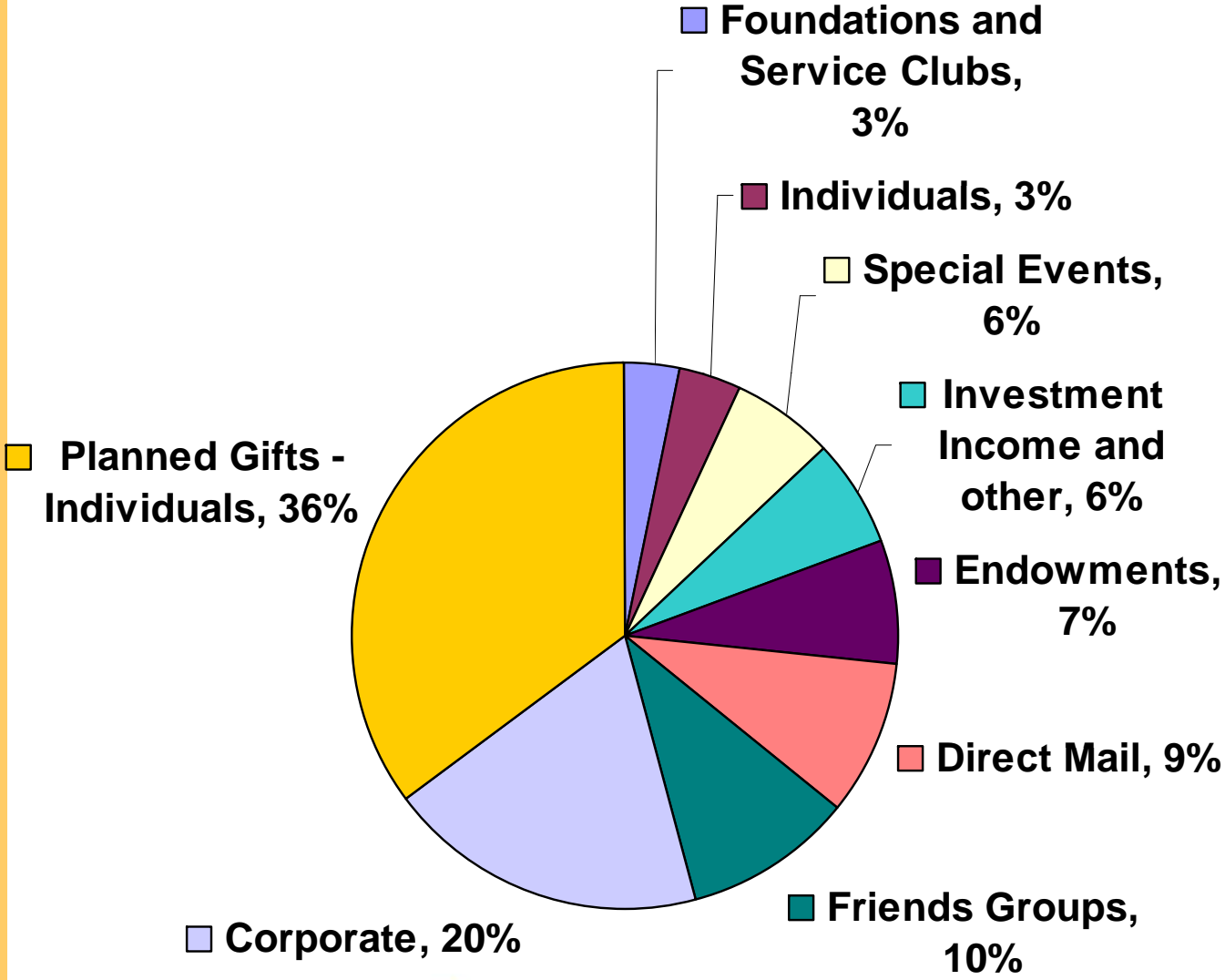
TPLF Fundraising Overview



* Excludes Gift-in-Kind, Government grants, and Planned Gifts/Endowments

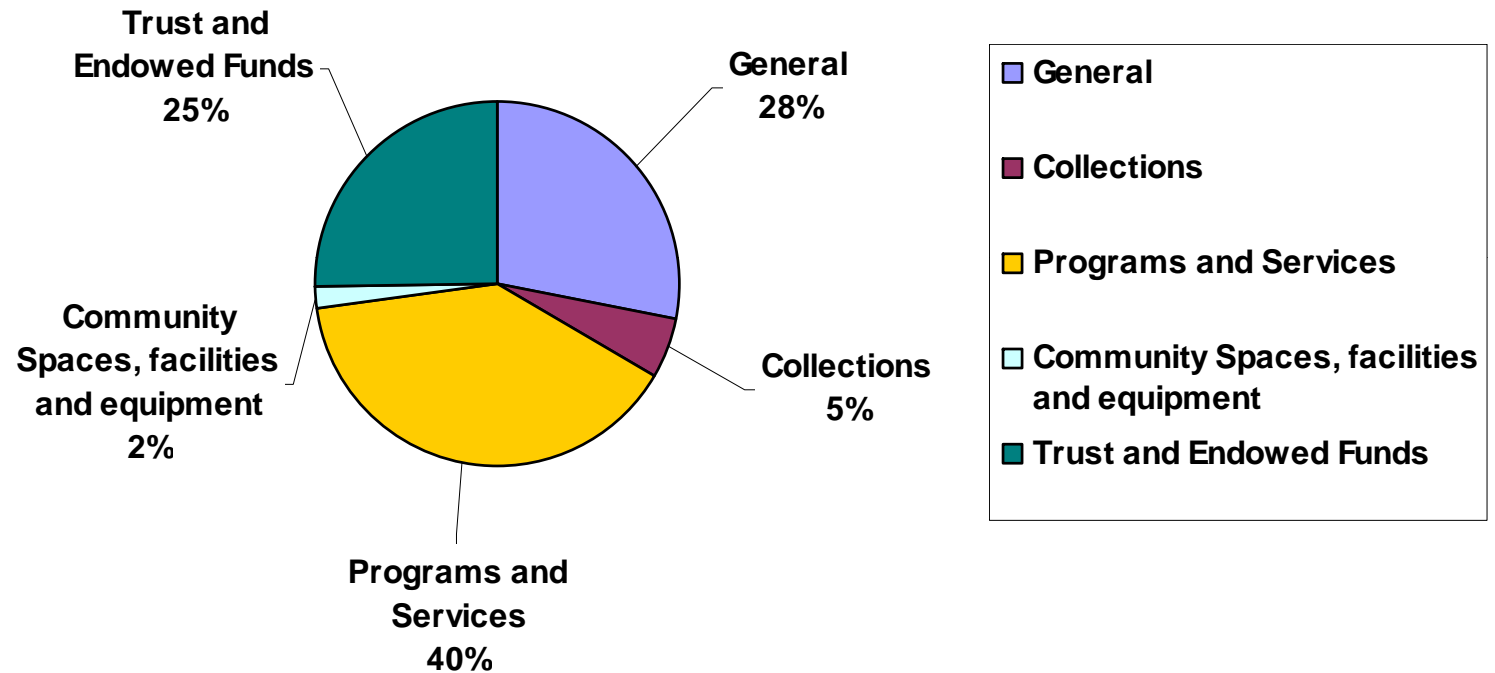
** Excludes Gift-in-Kind

Revenue Sources



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Funding Allocation



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TPLF Strategic Focus

- **Friend Raising** – *Working with Us*
 - Become the charity of choice for volunteering
- **Fundraising** – *Giving to Us*
 - Become the Foundation of choice for philanthropic giving in Toronto
- **Awareness Raising** – *Knowing of Us*
 - Establish top-of-mind awareness across all diverse communities

Fundraising

Annual Campaign

- Objective - achieve 15-20% annual growth in support of:
 1. Enhancing **Collections**
 2. Expanding in-branch and outreach **Programs & Services**
 3. Improving access to **Community Space and Technology**

Achievements

- TD Summer Reading Club sponsorship renewal (\$1.4M)
- Sun Life Financial Museum + Arts Pass (\$125K)
- \$1M anonymous donation to annual campaign

Fundraising

Capital Campaign

- Overall (3-4 years) Goal: \$20M
 - \$10 public sector funding (Province)
 - \$10 private sector funding
- 2008 Goal:
 - Achieve \$3M in commitments in support of TRL revitalization

Achievements

- \$10M Provincial funding to TRL campaign



Awareness Raising

- *The Book Lover's Ball*
- **Social Marketing Campaign**
 - Phase I (2007): "City builders"
 - Phase II (2008): Grassroots

Toronto's Library. Vital to our community
Absolutely Vital. Vital to our prosperity
Vital to support

Our city needs its library. And Toronto's Library needs you.
Donate to www.tplfoundation.ca today.



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Phase I: “City builders”

- Engagement piece
- Promotional video
- New website url

www.tplfoundation.ca

Phase II: Grassroots



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New Book Bags



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