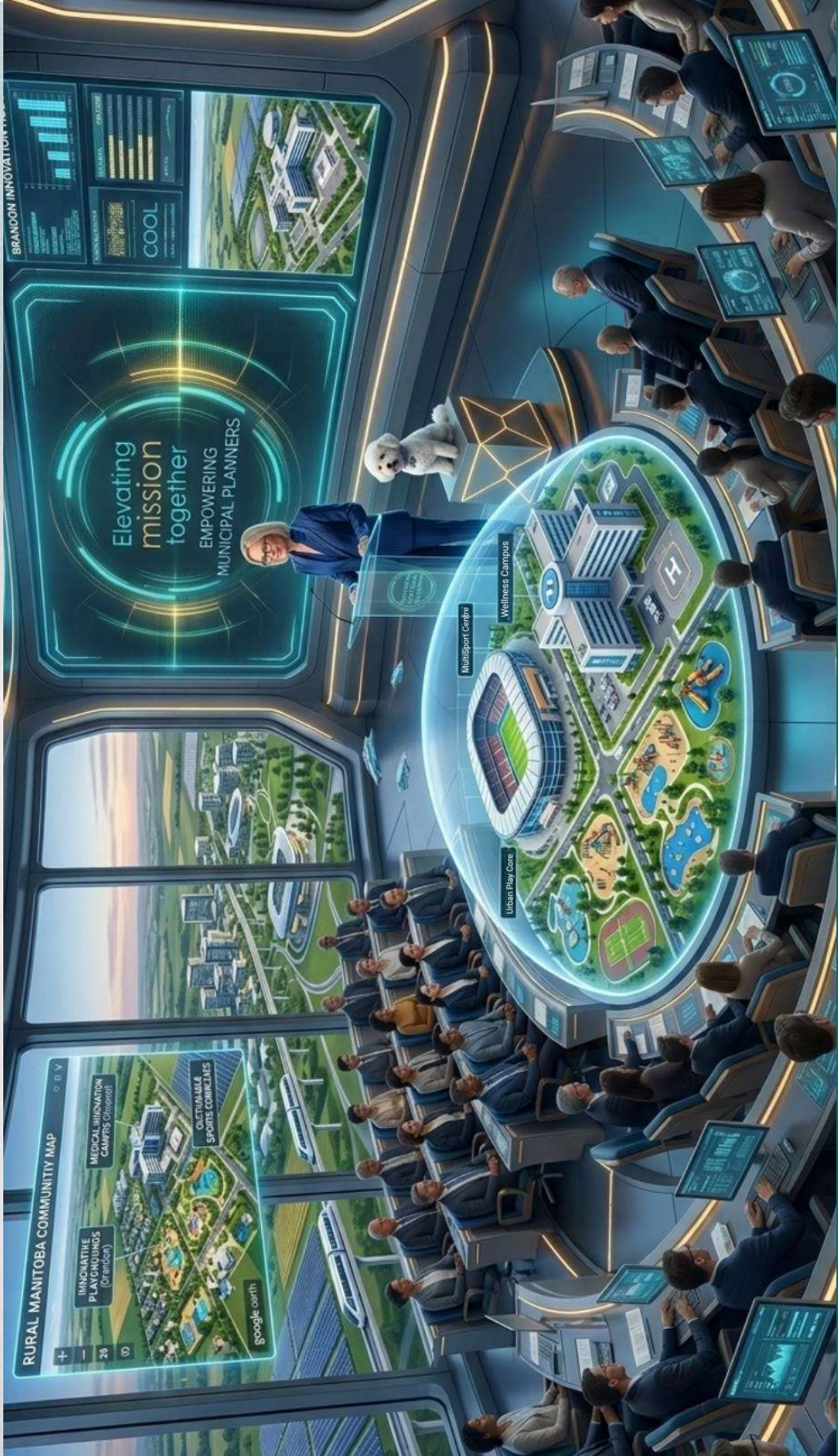


# Welcome

## From Plans to Philanthropy: Turning Public Priorities into Donor-Ready Projects

*Presented by:*  
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**Senior Consultant**  
**Global Philanthropic Canada**

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# Your influence

Municipal planners and local architects shape whether community projects are *feasible*, *funded, embraced*, and *enduring* — you influence everything from policy and zoning to design quality, community engagement, and long-term livability.

*Understanding how philanthropy can be leveraged to advance a community's vision is an important part of that influence.*

# Learning Outcomes

1. **Translate planning language into philanthropy language**
2. **Identify the funding gap between public budgets and community need**
3. **Build a donor-ready project brief**
4. **Apply a segmented engagement approach**
5. **Prepare for a cultivation conversation**

**What are your biggest  
challenges getting projects  
philanthropically funded?**

# Part 1

## The Planning Landscape

What organizations plan — and what they struggle to fund

# The Planning Ecosystem

*Most organizations have a plan. Many have several.*

## Strategic Plan

Mission direction, goals, and 3–5 year organizational horizon

## Capital Plan

Infrastructure, facilities, and equipment needs over time

## Program Plan

Services, programming, and client impact targets

## Operational Plan

Staffing, systems, and annual organizational priorities

## Community / Municipal Plan

Identified public priorities — the context your work operates within

# What plans don't tell you

Strategic plans describe priorities. They rarely describe fundable projects.

## Plans say:

“Expand our programming capacity”

“Address capital deferred maintenance”

“Strengthen community partnerships”

## Donors need:

**A welcoming recreation hub for all ages**

**“A safe, accessible building with a new roof and barrier-free entrance**

**“A funded coordinator who stewards supporters and builds 12 new relationships this year”**

# Part 2

## The Philanthropy Gap

Where public funding ends and private giving begins

# Identifying Your Organization's Gap

*A practical four-part analysis before any donor conversation.*

## **1. Map Your Funded Reality**

List what you currently receive from government, earned revenue, and reserves. What is covered today?

## **2. Define Full-Service Vision**

If resources were no constraint, what would full program delivery look like? What would change for clients?

## **3. Quantify the Difference**

Assign a dollar figure to the gap. Segment by: capital needs, programming, staffing, and innovation.

## **4. Name It for Donors**

Give each gap a project identity — a name, an outcome, a cost. Transform budget lines into donor opportunities.

**Reflection:** Where is your organization leaving philanthropic potential on the table by not packaging its gap?

# Philanthropy Gap

*The space between what government funds and what communities actually need*

## Public Funding Covers

- Core operations
- Mandated services
- Basic staffing
- Minimum facilities

## The Gap Includes

- Innovation & pilot programs
- Enhanced services
- Capital improvements
- Staff development

## Philanthropy Can Fund

Everything in the gap  
— **when it is packaged and presented with confidence and clarity.**

**What projects in your  
community could be funded by  
philanthropy?**

# Part 3

## Building Donor-Ready Projects

From gap to gift opportunity

# Anatomy of a Donor-Ready Project

Six elements that transform a budget line into a gift opportunity.

## 1. A Compelling Name

“Expand our programming capacity” The Reach Further Campaign

## 3. Human Outcome

Who benefits, how many, and by how much

## 5. Recognition Opportunity

Named space, endowment, or program — the legacy angle

## 2. Compelling Ask

Specific, priced, time-bounded: \$150,000 over 2 years

## 4. Community Context

Why this project, why now — the urgency and relevance

## 6. Stewardship Plan

How you will report back — proof of impact delivered

# The One-Page Project Brief

A concise, donor-focused document that anchors every cultivation conversation.

## 1. Project Name

“Expand our programming capacity” **Reach Further**

## 3. The Project

Who benefits, how many, and by how much

## 5. The Ask

Named space, endowment, or program — the legacy angle

## 2. The Need

Specific, priced, time-bounded: \$150,000 over 2 years

## 4. The Impact

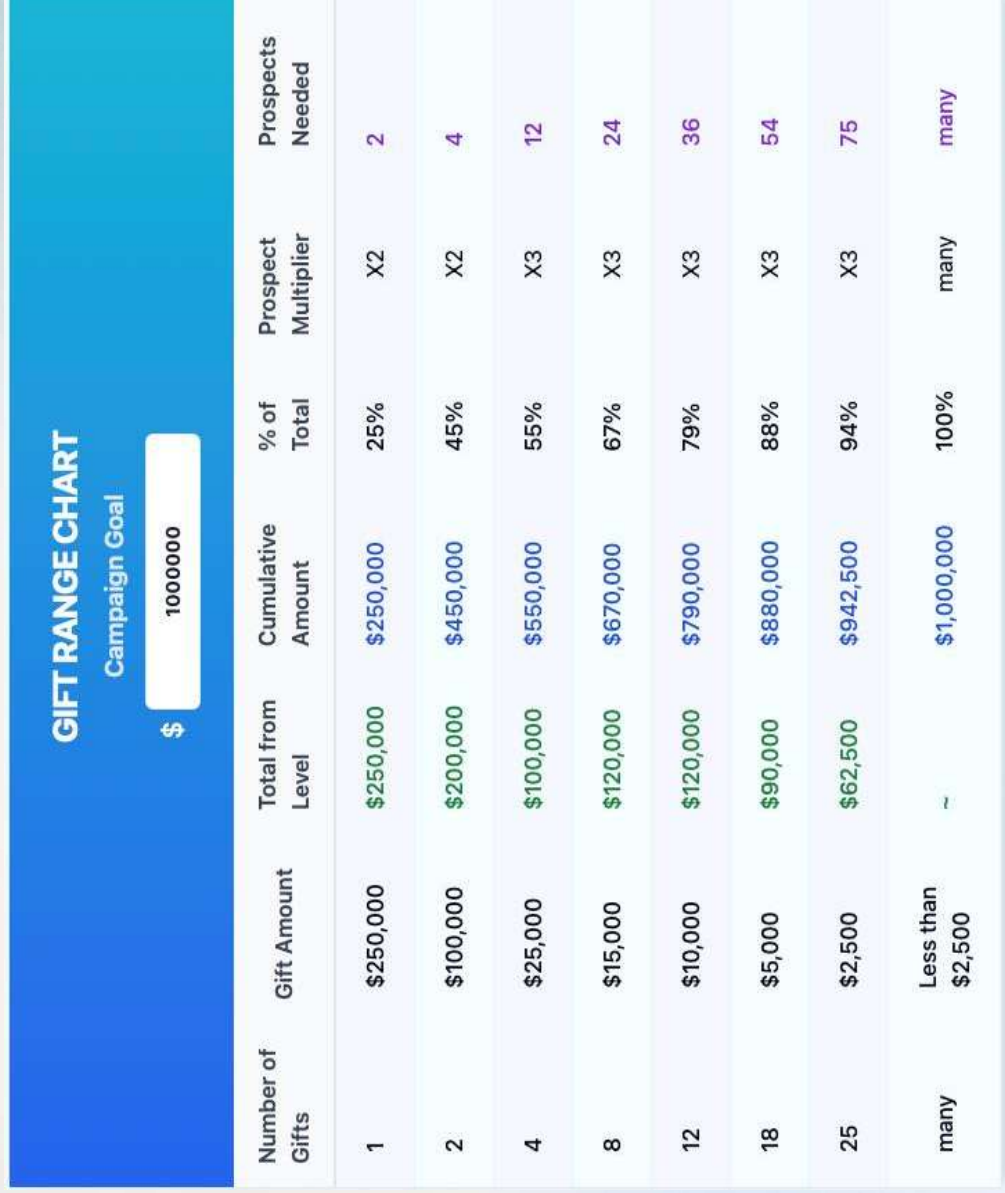
Why this project, why now — the urgency and relevance

## 6. Recognition

How you will report back — proof of impact delivered

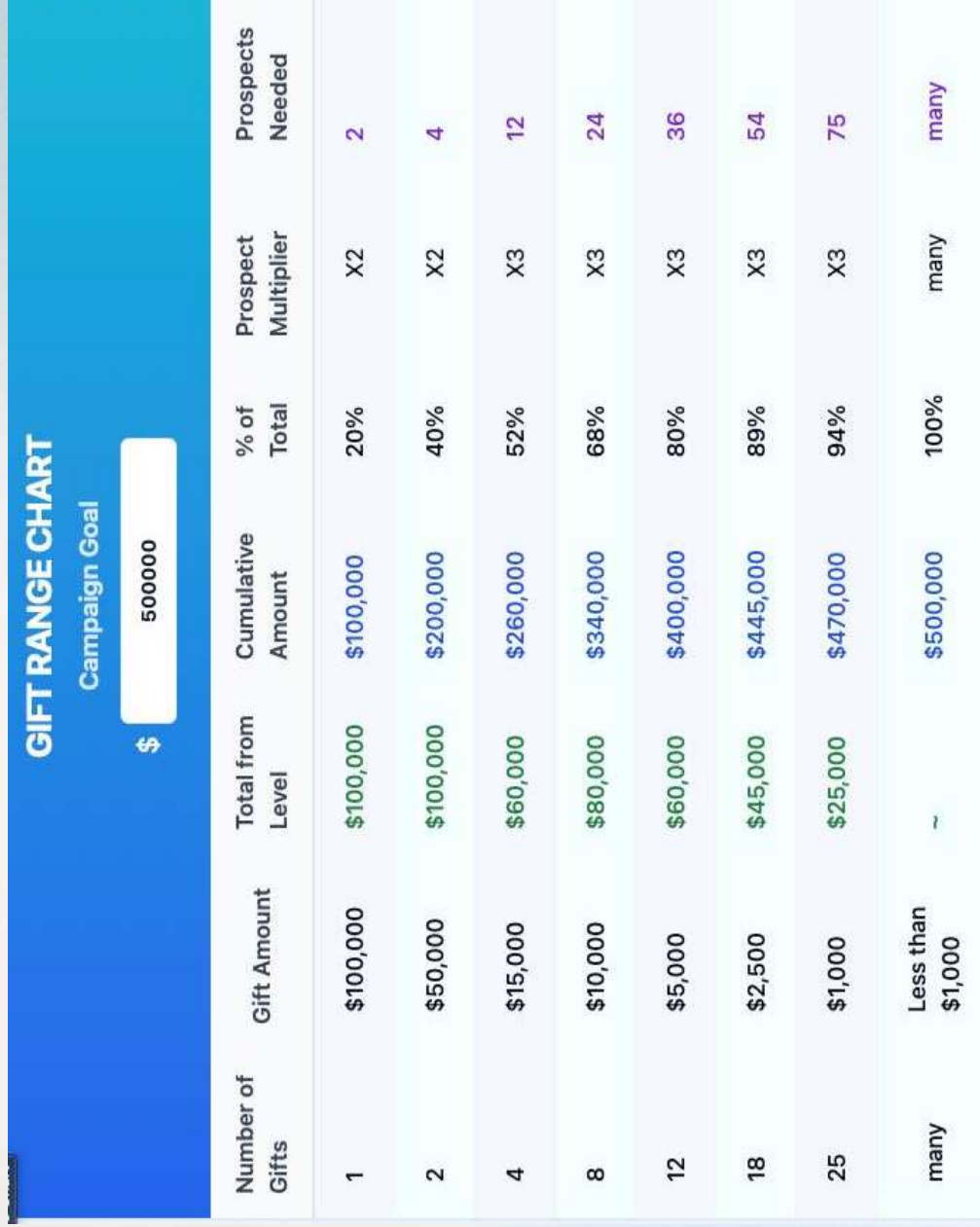
# Create Your Philanthropic Gift Chart

<https://capitalcampaignpro.com/gift-range-chart-calculator/>



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# Pricing and Packaging

Donors give to fully formed opportunities — not to vague aspirations.

## Tiered Project Packaging

### **Naming Gift** · \$500,000+

Full project lead gift — naming rights

### **Cornerstone** · \$100,000–\$250,000

Major component or phase of the project

### **Champion** · \$25,000–\$50,000

Specific program element, room, or role

### **Supporter** · \$5,000–\$10,000

Annual fund or multi-year commitment

### **Community** · \$1,000–\$2,500

Accessible giving with meaningful recognition

## Packaging Principles

- Price to the donor's capacity, not just to the budget
- Name every component generously — not just the lead gift
- Build a range that invites any donor to participate
- Always offer a multi-year option — donors appreciate commitment
- Start at 20% above your floor to leave negotiation room

# **Project brief – in groups**

# Part 4

## Donor Engagement

Matching the right project to the right donor

# Donor Segmentation Fundamentals

Not every donor belongs in every conversation. Segmentation saves time and relationships. Motivations vary.

## 1. Individual Major Donors

Motivated by legacy and values alignment. Lead with story and a named opportunity.

## 3. Corporate Partners

Motivated by brand alignment and community visibility. Lead with a partnership narrative.

## 5. Government Grants

Motivated by policy alignment and measurable outputs. Lead with numbers and systems.

## 2. Family Foundations

Motivated by strategic fit with giving priorities. Lead with evidence of impact.

## 4. Community Foundations

Motivated by fund guidelines and geographic priority. Lead with community need data.

## 6. Service Clubs & Associations

Motivated by local impact and tangible projects. Lead with the human story.

# Engagement Example: Individual Major Donor

*Turning a strategic priority into a legacy conversation.*

## The Scenario

Your strategic plan identifies a need to expand youth mental health programming. Public funding covers one counsellor. Full-service vision requires three.

**Funding gap:** \$280,000 over 3 years.

You have a donor with a personal connection to mental health who has been a loyal annual fund contributor for eight years.

## Cultivation Approach

### 1. Connect personally

A relationship with this person is key. Acknowledge their journey; share a client story with permission.

### 2. Share the vision

Describe full program potential: what a program with 3 counsellors could achieve.

### 3. Offer naming of the project

A relationship with this person is key. Acknowledge their journey; share a client story with permission.

### 4. Make the ask when the interest and time is right

“Would a gift of \$280,000 over three years reflect what this means to you?”

### 5. Make a stewardship plan

Annual impact report, counsellor updates, event invitation

# Engagement Example: Corporate Partner

*Framing community need as a business partnership opportunity.*

## The Scenario

Your community centre capital plan includes a new accessible sports court. Public grants will cover 60% — \$120,000 remains unfunded.

A regional financial services firm sponsors local sports events and has publicly committed to community wellness.

Employee volunteerism is a priority for their HR team.

## Cultivation Approach

- 1. Title Sponsorship**  
\$120,000 — naming rights: “[Company] Community Court”
- 2. Brand Visibility**  
Signage, social media, annual report, and opening event coverage
- 3. Employee Engagement**  
Build day volunteer opportunity and wellness program access
- 4. Community Narrative**  
Shared press release: company as community wellness champion
- 5. Annual Renewal**  
Ongoing maintenance fund partnership at \$15,000/year

# Engagement Example: Community Foundation

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*Aligning project priorities with foundation granting criteria.*

## What Foundations Prioritize

- Geographic focus alignment
- Evidence of community need
- Organizational track record
- Realistic outcomes and metrics
- Sustainability beyond the grant
- Collaboration and partnership

## Your Application Strategy

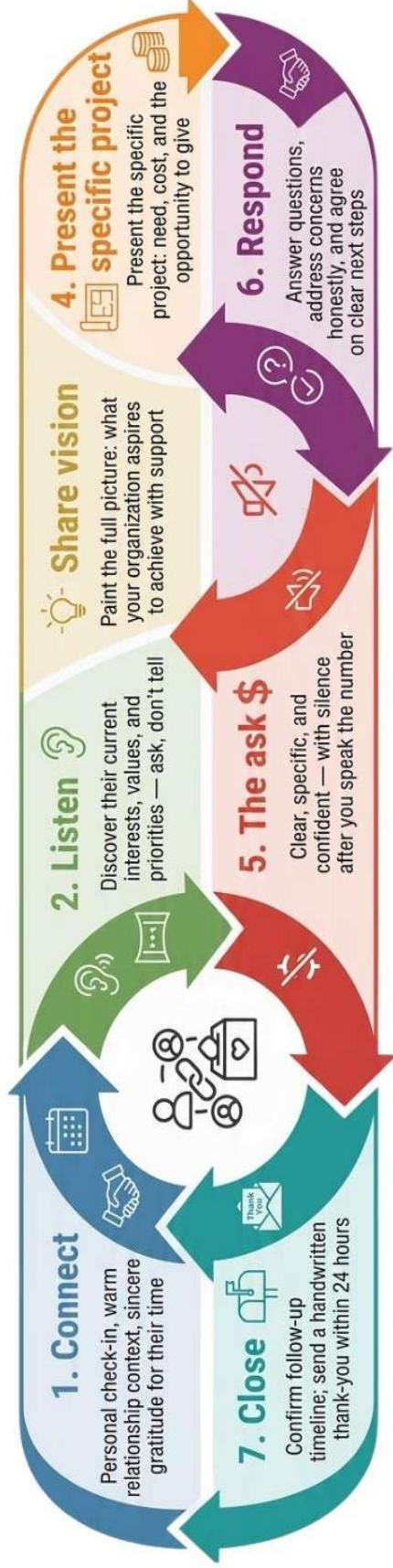
- Lead with community data, not organizational need
- Name specific measurable outcomes
- Show operational stability
- Map directly to their granting priorities
- Demonstrate multi-funder support
- Attach your one-page project brief

## Common Pitfalls to Avoid

- Starting with organizational history, not community need
- Vague outcomes ('strengthen community')
- Asking for 100% — show a blended funding mix
- Missing deadlines or late reporting
- No relationship built ahead of the application
- Submitting without a pre-application conversation

# The Cultivation Conversation Framework

Every donor meeting follows a shape. Know the shape before you walk in.



Connect to close

# Language That Works

Donors respond to confidence, clarity, and authentic invitation.

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Instead of this...

"We're really hoping you might consider maybe supporting our work if you're able to."



Try this:

**"Would a gift of \$25,000 over two years allow you to make the kind of impact you've told me matters most to you?"**

Instead of this...

"We need to raise \$200,000. We're still pretty far from our goal."



Try this:

**"We have \$80,000 remaining to fully fund this accessible entrance. Your gift of \$40,000 would get us halfway there by June."**

Instead of this...

"Whatever you're comfortable giving would be really appreciated."



Try this:

**"Based on what you've shared today, I'd like to invite you to consider a gift of \$50,000. Does that feel like the right level of impact for you?"**

# Key Takeaways

*Five things to do in the next 30 days.*

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## **Audit your strategic plan**

**1** Identify 3–5 priorities that represent a fundable gap between public support and full vision.

## **Write one project brief**

**2** Take one priority and build a full one-page brief: name, ask, outcome, recognition, stewardship.

## **Identify five prospects**

**3** For each project brief, name 2–3 potential donors — individual, corporate, or foundation.

## **Book cultivation conversations**

**4** Schedule coffee, site visits, or calls with your top prospects this month.

## **Practice your ask**

**5** Say the number out loud. Write it down. Get comfortable with confident, specific language.

## **Reach out for expertise**

**6** Philanthropy experts like Global Canada can help you achieve your goals at every stage.

“

*Every municipal plan begins as a quiet sketch of possibility. Partnered with fundraising expertise, that sketch becomes a donor-ready story—one that calls capital to the table, turns blueprints into gathering places, and lets residents recognize their own generosity poured in concrete, glass, and green space.*

[Rooted in Community: The Infrastructure Powering Collective Giving](#)

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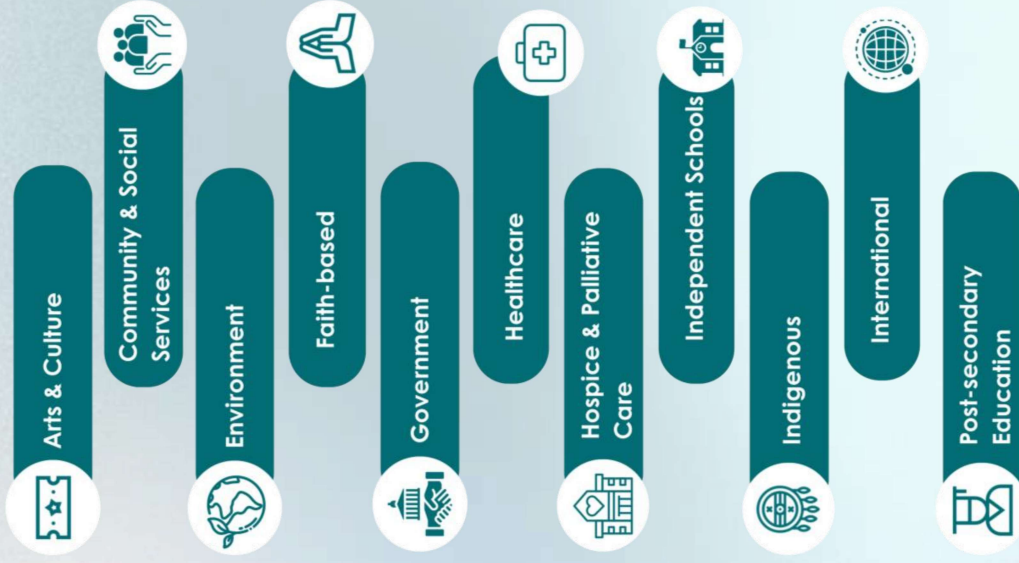
# Global Philanthropic Canada can provide strategy and more



## Our Skills

Annual Giving  
Audits & Assessments  
Board Development & Governance  
Campaign Planning & Management  
Case for Support  
Coaching & Training  
Communications & Marketing  
Data-Informed Fundraising  
Diversity & Inclusion  
Donor Relations  
Foundations  
Fund Development Planning  
Major Gift Development  
Philanthropic Naming  
Pipeline Management  
Planned Giving  
Prospect Research  
Small Shop Fundraising  
Special Events  
Sponsorship  
Stewardship  
Strategic Planning

## Our Sectors



# Global Philanthropic Canada



The business card features the Global Philanthropic Canada logo in the top left, a portrait of Pamela Simmons in the center, and contact details with a QR code in the bottom right. The card also includes the tagline 'Elevating mission together' and Pamela's title and name.

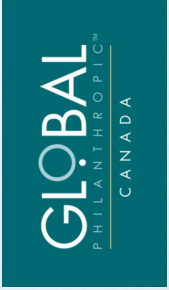
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Elevating  
**mission**  
together

**Pamela Simmons, APR, CFRE, CTT**  
Senior Consultant  
(she/her/hers)

Contact details



# Thank you