

THE ST LAWRENCE RIVER INSTITUTE OF ENVIRONMENTAL SCIENCES CASE STUDY

Image courtesy of riverinstitute.ca

ABOUT THE INSTITUTE

The St. Lawrence River Institute of Environmental Sciences is a non-profit research and environmental organization founded in 1993, with research laboratories, education and outreach programs.

The Institute came into being in response to community recognition that not enough work was being done on the management and preservation of the St. Lawrence River.

The Institute's core staff is headed by Executive Director and Chief Research Scientist Dr. Jeff Ridal. Both Dr. Ridal and Christina Collard, Program Lead, Administration and Fundraising, have been with the organization for more than 20 years.

FUNDRAISING

For many years, the Institute was kept afloat through *"minimal fundraising and a lot of friend-raising"*, and lacked a focused fundraising strategy. Although it had a fund development officer whose role was primarily focused on grant and proposal writing, the board had been encouraging the team to develop a more formal fundraising strategy for some years. As research funding began to stagnate and existing revenue streams looked unlikely to increase, the need for a fund development plan focused on private philanthropy became increasingly urgent.

THE ROLE OF GLOBAL PHILANTHROPIC

As part of their Request for Proposals, the Institute clarified that they were looking for *"an actionable plan, within the capacity of the organization, not just a strategy."* This was of particular importance to the organization in the light of their previous experience with a consultancy whose report had been highly strategic but lacked a practical focus. Global Philanthropic's ability to deliver both strategic advice and a detailed implementation plan was key to them getting the appointment.

Additionally, the leadership at St. Lawrence River Institute developed a good rapport with John Bouza, and sensed he would be a *"good fit for the organization"*.

"given our previous experience with working with consultants in this area, it was gratifying to know that there were still good consultants out there." Christina Collard, St Lawrence River Institute

RIVER CHAMPIONS PROGRAM

John started his appointment by interviewing staff, researchers and community leaders to review the existing situation and provide core recommendations. Central to these was an emphasis on moving away from creating *"one-off"* mass fundraising campaigns that could not be sustained annually. Rather than a mass community appeal that would require extensive resources, he proposed a volunteer-led but staff-driven ongoing program addressed to mid-level potential donors (ranging from CAD\$1000 to \$5000 a year).

From this core strategy, the River Champions program was born. This new program invites community members in the St. Lawrence River area to enter into a *"direct, meaningful and long-term relationship"* with the Institute when they contribute \$1,000 or more each year. In this way, the Institute seeks to more closely engage with the people that they had spent the previous two decades *"friend-raising"*.

As part of the program, a clear donor stewardship pathway was developed, beginning with encouraging people to visit the Institute to find out more about research and the work being done. The *"ask"* centers on inviting individuals and small local companies to *"join with us as a River Champion."*

The personal and community benefits are emphasized over the total dollar amount being sought, and the smaller monthly amount is highlighted rather than the sum. E.g., \$83.34 a month versus \$1,000. The program, described as a *"donor circle,"* seeks to highlight the significant role played by community in the life of the river, as well as the tangible benefits donors will receive.

The implementation plan included setting a fundraising goal for each year, broken down as a set number of new donors recruited as Champions each month. The pilot project focused on the board of directors, senior staff, and key *"insider volunteers."* It was very successful and the roll out of the program began in January 2016.

While some restructuring of staff roles was required and some part-time additional administrative support was recruited, the program design has been implemented within the bounds of the organization's capacity.

Regarding working with Global Philanthropic (John Bouza), Christina said that *"given our previous experience with working with consultants in this area, it was gratifying to know that there were still good consultants out there"*. The Institute also appreciated that John could provide *"a clearly articulated strategy and actionable, specific plan"*, and highlighted that John *"gave attention when it was needed, and was excellent at being available and flexible in his approach to working with the team"*. The Institute staff also found that John's extensive international and cross-sector background meant *"he had the experience to give proper advice across a range of issues"*.