

A GUIDE FOR CHARITY INFRASTRUCTURE RENEWAL

BACKGROUND

In 2017 the HeroWork Society started a 3-phased study on charity buildings in the greater Victoria.

Phase 1 was a needs assessment survey of charity buildings, which gave us a wide array of data. From this we confirmed our anecdotal observations that a large number of charities need renewed infrastructure to deliver their mandate more effectively and sustainably.

Phase 2 was a non-profit education and feed back forum on infrastructure. During this forum we heard that many charities lacked the capacity to embark on the journey of renewal. These gaps were in the realms of internal organizational preparedness, fiscal preparedness, and partnership preparedness.

Phase 3 was a “systems approach” forum that brought together 6 industries and 40 leaders to explore charitable infrastructure through the lens of the “system” that surrounds charity buildings, namely the construction industry, the financial industry, foundations and funders, various levels of government, the real estate sector, as well as the charitable sector. During this session each of these groups agreed that charities need to be prepared internally and externally with clarity around vision, mandate, assets, leadership, capacity, finances, partnerships and more.

They suggested the creation of a road map or guide for charities to prepare charities for the journey. This is that guide.

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ABOUT HEROWORK

We are a charity that renovates other charities. Many charity buildings are run down and in need of repairs or upgrades. HeroWork is on a mission to make this better. Here's how:

1

Worthy Charities

We work with worthy charities that want bigger impact but need improved infrastructure.

2

Amazing Partners

We partner with many businesses to help with a full array of construction services, supply, hospitality & more.

3

Radical Renovations

We put on huge community events in which we complete comprehensive renovations in a fraction of normal time.

To date we have completed over \$4 million worth of non-profit renovations in the CRD. A typical year will see HeroWork engage over 100 companies, more than 50 coordinators, and in excess of 500 volunteers, who all provide either goods and/or labour in kind. We also receive seed money from our partner charities and funding from other community agencies.

We are now developing a replicable model that can help HeroWork expand across the country, empowering communities to renew and/or expand charity

infrastructure. Our vision is to enable charities in many cities to make bigger social change, become more sustainable, better serve vulnerable populations, and lift up the neighbourhoods where their important services are provided.

As a unique charity that focuses solely on charity infrastructure, HeroWork is strategically positioned to study the issue and help other charities develop their capacity to improve the spaces in which they operate.





OVERVIEW OF GUIDE

Infrastructure renewal starts with a need and a vision. With hard work, strategy and perseverance that vision turns into bricks and mortar.

The diagram on the next page visualizes the steps to take to have a successful journey and outcome. Although each step is separated, in reality several steps can be happening at once.

The first step is to ensure your organization is ready to embark on the journey. It improves your organizational capacity and understanding to ensure your charity has the resilience and ability to manage each of the subsequent steps.

The second step helps you to explore your idea and vision of infrastructure renewal, asking questions regarding your research, initial partners, financial constraints, and the feasibility of your vision.

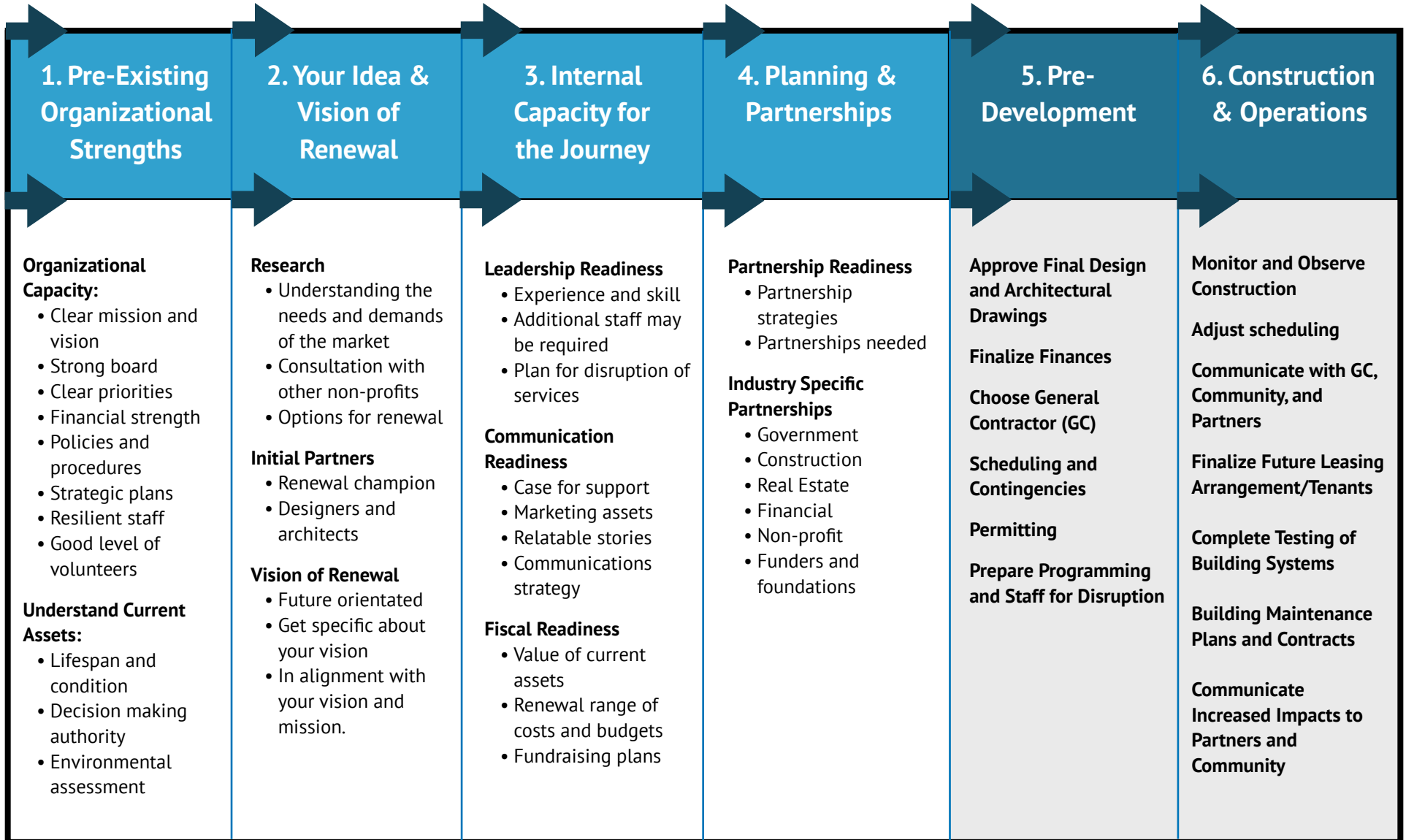
The guide goes on to explore your charity's internal capacity, looking at leadership, communications, and fiscal readiness.

Then it switches towards your capacity to manage external partners, providing suggestions gleaned from many leaders in each of the 6 industries that make up the "system" through which charity infrastructure exists, operates, and is renewed.

This guide does not go into the details of the last two phases—pre-development and construction/operations—as these phases are often technical and too widely varied to be contained within this short guide. However, if a charity does a good job at the first four stages they are well prepared for the final legs of the journey.

At each stage, it's crucial for your organization to use your mission and vision as a lens to decide how to proceed.

Scope of Guide



HOW TO USE THIS GUIDE

This guide is designed as a high-level road map for charities embarking on the journey of infrastructure renewal. It is a resource that asks questions and gives suggestions for capacity building. Pick and choose those parts that are most relevant to your organization and project.

The questions and suggestions apply to a wide array of possible projects and infrastructure decisions:

- The renovation and/or expansion of an existing building.
- The selling a current building and purchasing a different one.
- The re-development of existing land.
- The purchase or lease of a building for the first time.

To pursue any kind of major infrastructure renewal, a charity must have a wide range of capacities. This guide touches upon

many of these capacities with the intention that you will be able to better plan your journey.

The guide is divided into major sections that correspond to the steps in the graph on previous page. These major sections are then broken down into topic areas. Each topic area has a series of questions.

As you go through these questions, rate your organization's level of related experience and expertise. This will pinpoint areas that you need more energy and focus to build your organization's capacity.

Beside each set of questions are suggestions to consider to increase your capacity and ability to engage in the process of renewal.





1. PRE-EXISTING ORGANIZATIONAL STRENGTHS

The first step is to ensure your organization is ready to embark on the journey.

This section probes your organizational capacity and understanding to ensure your charity has the resilience and ability to manage each of the subsequent steps.

Topic Area: 1.1 Organizational Capacity		
Questions to be Rated (1-5)	Rating	Suggestions for Improvement
Is your mission and vision clear and broadly understood internally and externally?		<ul style="list-style-type: none"> Complete a board and/or staff dialogue to gain the necessary clarity. Hire an excellent facilitator to do this. Ensure you give yourself plenty of time afterwards to theme, reflect, and distill the information. Bring document back to your internal stakeholders for confirmation and tweaking. Develop a clear and visually simple way to communicate your mission and vision. Ensure you can do this in “grant language” and in “plain language.” Ask for feedback from those who don’t know your organization for input on their clear understanding of your vision and mission.
Are your organizational priorities and services targeted and strategic with the marketplace, i.e. no overlap of services.		<ul style="list-style-type: none"> Research the market, talking to other non-profits and community leaders in your sector. Do an environmental scan. If appropriate, take a leadership role and organize a round table session of all the leaders in your sector to investigate overlaps, efficiencies, and collaboration. Give time afterwards to theme and distill the results, incorporating it into your strategic plan.
Is your board diverse with the right skillsets, using an appropriate board matrix?		<ul style="list-style-type: none"> Determine you type of board: operational, governance, or a blend. There is no right or wrong answer, only a right fit for your organization. Ensure your chair is passionate, engaged, and has the capacity to grow your board Determine the necessary standing committees required. Develop a board skills matrix. There are standard skills like accounting, advancement, legal, governance, as well as skills that pertain to your market. Recruit members only according to your matrix.
Do you have a current strategic plan for your organization that incorporates infrastructure renewal?		<ul style="list-style-type: none"> Before completing a strategic plan, ensure your vision, mission, and priorities are clear. Organize a strategic planning day with your board. Hire a skilled facilitator. Allow plenty of time afterwards to theme, reflect, and distill the results. Ensure board buy-in of the finished document. Ensure your strategic plan has strategies, goals, and measures. Develop an external version (simple and visual) and an internal version (specifics and measures).

Topic Area: 1.1 Organizational Capacity (Cont.)

Questions to be Rated (1-5)	Rating	Suggestions for Improvement
Do you have policies and procedures in place that are practiced throughout the organization?		<ul style="list-style-type: none"> Your organization should have policies and procedures to withstand an audit. Even if you haven't had an audit, consult with an auditor to discuss the right policies and procedures required for your organization to be strong. Do you have the appropriate board and operational policies: HR, handbooks, on boarding, fundraising, volunteer, etc. If not, research and develop appropriate policies. Allow time for iteration, reviewing and adjusting them every few years.
Are you financially sustainable with realistic business plans and a proven track record?		<ul style="list-style-type: none"> Diversify your revenue streams. For example, if you have strong fundraising, find a way to created earned revenue or a social enterprise. Stay focused on your core priorities, delivering quality that is measurable and reportable. Be careful not to chase money that defocuses you from your defined strategic priorities. Complete annual reports that show qualitative and quantitative impacts. Chronicle these impacts over the years.
Is your staff effective and stable?		<ul style="list-style-type: none"> Your people are your greatest resource, invest in them through relationship, professional development, and culture. On board and train your staff well. If you don't have training materials, use current experienced staff to create them. Have equitable compensation for staff. If you don't, make a plan to build up to equitable rates and communicate that plan to staff.
Do you have an appropriate level of volunteerism?		<ul style="list-style-type: none"> Develop a volunteer culture. Volunteers get involved with non-profits because they want to create change, get connected, and have an experience. Develop or transition your programs to provide value for not only your clients but your volunteers as well. Ensure your staff culture reinforces your volunteer culture through positivity, inspiration, and recognition.

46% of non-profits
have buildings that are
60 plus years of age.

46%

HeroWork's Needs Assessment Survey 2017

36%

36% of charities say that they
require renovations either
urgently or very urgently

HeroWork's Needs Assessment Survey 2017

Topic Area: 1.2 Understanding Current Assets

Questions to be Rated (1-5)	Rating	Suggestions for Improvement
Do you know the lifespan, current condition, and value of your building or the building you are researching?		<ul style="list-style-type: none"> Engage an engineer and/or construction professional (volunteer or otherwise) who can complete a depreciation report, outlining the condition and lifespan of different elements of your infrastructure. Such reports can be very long and expensive; determine the level of detail required for you. If appropriate, create a maintenance plan with fiscal targets to manage expenses. Ensure this plan is flexible to evolve with changing community needs. Talk to a real estate agent or appraisers to determine the value of your property after debts.
Have you had an environmental assessment?		<ul style="list-style-type: none"> Find out the age of your building and/or the years of past renovations. Prior to 1990 asbestos and other hazardous materials were widely used. If appropriate complete an environmental assessment of your building, determining if any hazardous materials exist. These can skyrocket renewal costs and it's best to know this upfront.
Do you know who has decision making authority regarding your property? Most of the time this is clear, but not always.		<ul style="list-style-type: none"> Contact your municipality to understand any constraints on development. An architect will also have detailed knowledge of restrictions and any processes for altering these restrictions. Your legal status may require the consultation of trustees or a high level body in your network. For example, a church holds it's lands in trust on behalf of a regional umbrella organization. All decision must be approved both regionally and locally. Another example is a non-profit that is associated directly with a foundation, where both the foundation and the non-profit must jointly decide on property decisions. Consult your board's legal representation as appropriate.





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2. YOUR IDEA & VISION OF RENEWAL

The second step helps you to explore your idea and vision of infrastructure renewal, asking questions regarding your research, initial partners, and the feasibility of your vision.

Topic Area: 2.1 Research		
Questions:	Rating	Suggestions for Improvement
Do you understand the needs and demands of your market?		<ul style="list-style-type: none"> • This may seem like old hat, something the you have done in detail, but be sure you have up to date research in your mission's area of need. If appropriate reach out to other organizations (non-profits, government agencies, provincial or national service agencies and foundations, etc.) to understand where you can be most effective within your mandate. • Consult with your current clients and stakeholders to understand how they see the future needs and issues. • Research the latest data to determine how you can be proactive and innovative getting ahead of the curve. Your vision of renewal should be forward looking to what you will need 5, 10, or 15 years in the future.
Have you consulted with other non-profits to determine their solutions or if there is service overlaps?		<ul style="list-style-type: none"> • Research any overlap of services with other non-profits or social agencies. Consult with appropriate organizations and collaborate to eliminate overlaps as well as ways to increase efficiency and innovation. Determine if this alters your vision of renewal. • Research solutions that have been developed in other communities and/or countries. Determine if these solutions can inform or alter your vision.
Have you consulted with the neighbourhood, individual neighbours, neighbourhood organizations and municipalities?		<ul style="list-style-type: none"> • Depending on the nature of your renewal vision, your project may significantly impact the immediate neighbourhood. Be able to articulate how your renewal will improve the neighbourhood, either through aesthetics, economic development, increased safety, accessibility of spaces for other neighbourhood activities, adaptability for future neighbourhood changes, etc. • Connect with municipal councillors to ensure you are clear on any neighbourhood plans • Research similar development projects from the past to determine risks regarding municipal approvals. Research local zoning and planning requirements to develop a good understanding of local constraints. Good practice will include a visit your local planning department to determine what's possible and what's not.

Topic Area: 2.1 Research (Cont.)

Questions:	Rating	Suggestions for Improvement
Have you considered a range of solutions for renewal?		<ul style="list-style-type: none"> At a high level you have four basic options: renovate and/or expand your current building; sell your current building and purchase a different one; re-develop your current property, building a new purpose-built structure; or purchase or lease a building for the first time. Get clear on the pros and cons of each of these options as they pertain to your situation.

Topic Area: 2.2 Initial Partners

Questions:	Rating	Suggestions for Improvement
Have you developed a list of initial partners you will need to engage?		<ul style="list-style-type: none"> Depending on the nature of your renewal, you will need to engage several partners early on in the process. Most likely these will be space planners, designers, architects, and engineers. They will help you understand the art of the possible as well as any building code requirements. But understand that the architect is not the builder and there can be a healthy tension between “vision” and what’s “buildable” within budgets constraints. Consider starting this process by engaging these stakeholders as volunteers. Later on, you can determine who the best fit for your organization will be. Depending on the size of your project, it is wise to put out a “request for proposals” that will be a bidding process for the various phases of planning, pre-development, and construction.
Do you have a renewal champion?		<ul style="list-style-type: none"> A renewal champion should be a charismatic leader with experience in project management and conflict resolution. He/she should be able to help develop the vision for the renewal without “taking over.” This champion should also have the connections necessary to recommend partners and move the project forward. You may need more than one champion so that you mitigate risk and ensure you have the full breadth of skills and experience necessary. In a perfect world this champion might be on your board.
Are there non-profits that could be strategic partners in your renewal vision?		<ul style="list-style-type: none"> Determine if it’s strategically advantageous to include other aligned non-profit organizations to help renovate, co-habitat, co-finance, or lease from you. Working together in collaboration can make your project more attractive and feasible. Be sure any partner holds similar values to your organization.
Have you started to build a renewal team of partners?		<ul style="list-style-type: none"> Further on, this guide goes into partnerships more deeply, but consider creating a list of potential partners early on in the process. These partners could include funders, tenants, professionals, community leaders and representatives, umbrella organizations, etc. When brought into the process early they can open doors for collaboration and networking. Be sure any partner hold similar values to your organization.

Topic Area: 2.3 Vision of Renewal

Questions:	Rating	Suggestions for Improvement
How clear and specific is your vision of infrastructure renewal?		<ul style="list-style-type: none"> • Envision where you want your organization to be in 10 years. This is important as you want connect your vision with your renewal. • Create a description of infrastructure that empowers this vision. Get specific about what will improve or expand your impact and sustainability. Be bold with this endeavour. Ensure your board, your leadership, and the market you serve are in agreement with this vision. • Determine if your infrastructure vision will affect other non-profits. Chronicle this information. • Engage an architect to help you understand the art of the possible as well as any building code requirements. (But understand that the architect is not the builder and there can be a healthy tension between “vision” and what’s “buildable” within budget constraints.) • Ensure your vision is in alignment with your mission and values. • Re-consult with your stakeholders to confirm your vision and plans, knowing that no one solution will satisfy everyone, which is part of the reason for the three-tiered requirements list.
Have you developed a comprehensive list of needs?		<ul style="list-style-type: none"> • Develop a list of prioritized needs/requirements, using three tiers: absolutely must have, important to have, and would like to have. Generally this will need to be done several times, as each attempt helps to make you and your team clearer and clearer. Such lists will also greatly help designers and architects with their work. • This list can stay high level at first, but will need to get very specific the closer to any design or purchasing phase. Your initial partners will also help with specificity.





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3. INTERNAL CAPACITY FOR THE JOURNEY

This third step explores your charity's internal capacity, exploring leadership, communications, and fiscal readiness. The questions and suggestions are meant to provide a way to test and gauge your preparedness in this area.

Topic Area: 3.1 Leadership Readiness		
Questions:	Rating	Suggestions for Improvement
Do you have the leadership team in place that has the necessary skills and experience to manage and deliver a renewal project as well as work with the range of sector stakeholders?		<ul style="list-style-type: none"> • If your current leadership doesn't have the necessary skills and experience, allocate more time for learning and capacity building. Even hiring external stakeholders to manage a renewal project takes staff time and expertise to manage and track. The less experience the more time it will take. • Interview the leadership of other organizations who have gone through similar projects to get their lessons learned. • Contact your local construction association and ask if there are any appropriate courses you can enrol in. • Put a small team of internal advisors together that can assist in pooling knowledge. • Put a small team of external advisors together that can assist in pooling knowledge. (See external partnership section below for suggestions.)
Will the renewal require additional staff and/or changes to governance structures?		<ul style="list-style-type: none"> • When asking yourself if you require additional staff, consider not only the renewal phase but also future infrastructure management. • Consider hiring under contract rather than a full time staff person. • Ensure any hire has the understanding and experience of working in non-profit renewal projects. There can be significant difference when compared to many for-profit ventures. • It may be appropriate to change some governance structures for a renewal project, such as adding a committee to your board for renewal, changing policies around debt and/or fundraising, creation of a special advancement committee, etc. Review your structures and policies and be strategic about any changes needed.
Does your organization have a skilled and connected champion that can promote the renewal process?		<ul style="list-style-type: none"> • It often serves a charity to inspire one or more renewal champions that have experience and skill in the area. Use your vision of impact that will result from the renewal to inspire people. • This person(s) can be crucial in advising, recommending, promoting, and providing guidance through the process. Consider using a matrix of the kinds of skills and experience you are looking for. Use this matrix to determine who to bring on board and when. • Use a Terms of Reference document or at least be very clear on the champion's role so as to avoid conflict through over-stepped or misaligned boundaries.

Topic Area: 3.1 Leadership Readiness (Cont.)

Questions:	Rating	Suggestions for Improvement
Do you have a plan to deal with the disruption of service that will result from the renewal process?		<ul style="list-style-type: none"> • Renewal of existing infrastructure will definitely disrupt your organization. Determine the amount of disruption your organization can handle and for how long. You may need to find alternative spaces to deliver your mandate or alter your services during the disruption. • Ensure that you allow for contingency of time over-runs. Often renewal projects take longer than expected. • If appropriate, explore if the renewal can happen over phases, rotating staff and services to different parts of your building as the project proceeds. • Be flexible. These plans can change over time as you get closer to a renewal project. Ensure all plans (and significant changes to these plans) are communicated clearly to your stakeholders, both internal and external.

Topic Area: 3.2 Communication Readiness

Questions:	Rating	Suggestions for Improvement
Do you have a powerful case for support with appropriate data and analytics to capture direct and indirect impact statements?		<ul style="list-style-type: none"> • Get clear on all the reasons why your current infrastructure is diminishing your ability to deliver and/or expand your mandate. These could include high maintenance, high utilities, inefficient workflow, poor aesthetics, unsafe conditions, not enough space, etc. In addition to the physical limitation of your space, the community may have an increased need for your services or you may be planning to expand your mandate to include other initiatives, etc. You should compile a comprehensive list of reasons why you need a renewal project. • Take the above comprehensive list and articulate how a renewal project will impact your mission and vision in both the short term and long term. Be sure to use data as well as stories. • Be able to give this case for support in a short “elevator speech” and also be able to go into the details. • Ensure all of this is chronicled in key messaging.
Do you have marketing assets available and the skill to communicate the possible project, both internally and externally?		<ul style="list-style-type: none"> • Be sure to use your case for support to develop marketing materials. Visuals and clear diagrams are crucial for this. Listing your data in a visual format (such as info graphic) is an effective way to communicate your need. Also, designs and drawings help to articulate your vision in a way stakeholders can picture. Hire a graphics professional if needed to achieve clear and powerful marketing assets. • Use these assets both externally and internally. They will help to empower champions and ensure that your message is consistent and clear.

Topic Area: 3.2 Communication Readiness (Cont.)

Questions:	Rating	Suggestions for Improvement
Does your organization have relatable “stories” to demonstrate the impact of your renewal project?		<ul style="list-style-type: none"> • In addition to data and impact statements, develop passionate stories that people can relate to. There are two sides to our brain, the data side and the emotional side. Consider making these stories specific, relating to a single person who represents a larger group. Paint pictures of how your renewal project will solve these challenges. Craft multiple stories. • Train your staff and “champions” on how to tell these stories.
Do you have a communications strategy to promote your renewal project?		<ul style="list-style-type: none"> • If you don’t have this, develop one. Determine your critical targets for promotion, which could be donors, media, developers, clients, volunteers, etc. Ensure you document the best ways to reach each of these targets. Add key messaging that you’ve developed above. Connect your marketing materials as appendixes and ensure you chronicle the responsible person(s) in charge of communications. • If necessary, research communication strategies from other organizations to get examples on best practices. Be sure to research several examples to become knowledgeable regarding options and styles.

Topic Area: 3.3 Fiscal Readiness

Questions:	Rating	Suggestions for Improvement
How well do you understand your financial situation?		<ul style="list-style-type: none"> • Review and assemble all financial information relevant to your organization and its infrastructure renewal. Be clear on the value of your assets, your ability to borrow capital, borrowing rates, and repayment rates. • Ensure your documentation will give confidence to funders, lenders, and other potential partners.
Do you understand the range of costs associated with the renewal plan? Does your renewal plan also include ongoing maintenance and future renewal costs?		<ul style="list-style-type: none"> • Understanding the full costs now and into the future is a key element to the success of your project. Be realistic regarding costs, both internal and external, capturing costs from all phases of the project: the idea, concept/feasibility, business planning, pre-development, construction, and operations. Depending on the size of your project, undertake an independent capital cost analysis for your project. • Ensure you have overrun budget contingencies in place. • If appropriate, interview other organizations who have gone through similar infrastructure renewal projects. Ask them about their budget challenges and if you can see their budget documents so you have an example. Be sure to interview several organizations to have a good range of examples. • Engage your champion to review budgets and offer advice and suggestions. • Good planning is critical to stay on budget. One of the biggest reasons for going over budget is changing designs after construction has begun.

Topic Area: 3.3 Fiscal Readiness (Cont.)

Questions:	Rating	Suggestions for Improvement
Do you have a high-level budget figure? How confident are you of this figure?		<ul style="list-style-type: none"> • Determine if the cost of your renewal is realistic to the size and capacity of your organization. • If your vision is too big for your budget, determine if you are willing to extend your timelines to allow your finances to catch up to your vision. • Arrive at a figure you can work with. Ensure your board and leadership is in agreement.
Do you have a realistic fundraising plan?		<ul style="list-style-type: none"> • Start your fundraising early and develop a good plan that utilizes a range of options from your current supporters as well as new possible targets. Your plan could capture donors, sponsors, goods and labour-in-kind, discounts, granters, foundations, events, government and more. It could also utilize partners to leverage efforts and funds. • Be sure that your infrastructure fundraising doesn't diminish your resources needed for current operations and programming. • Research infrastructure grant possibilities. Speak to other organizations about the kinds of grants they have received for similar projects. • If you lack experience, interview and engage other organizations to see examples of their fundraising plans and ask questions re lessons learned. • Develop milestones of funding so you can show and celebrate each one with your range of funders, staff and volunteers. • Plan for your infrastructure fundraising to strengthen your normal fundraising post project.
Does your organization have the skill, experience, and relationships necessary to complete this campaign?		<ul style="list-style-type: none"> • Plan for more preparation time and slower progress if you don't already have the skill, experience and relationships. You'll have to hire or develop staff internally. In either case this takes more time and money. • Develop a fundraising cabinet to assist with networks and relationships. Ensure clear terms of reference. • Build capacity through learning, courses, interviews, and experimentation. • With all of the previous steps complete, be brave and put it out there. You are already in good shape!



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4. PLANNING & PARTNERSHIPS

This fourth step will help you manage external partners. It provides general and specific suggestions provided by a group of over 40 leaders gathered from the 6 industries. This system makes up the "system" through which charity infrastructure exists, operates, and is renewed.

Topic Area: 4.1 Partnership Readiness		
Questions:	Rating	Suggestions for Improvement
How confident are you regarding your general partnership strategies and practices?		<ul style="list-style-type: none">Engagement suggestions that were consistent across all industry leaders:<ul style="list-style-type: none">Engage partners at the beginning of the process.Share the vision so they understand what you are trying to achieve. Be clear and concise on your asks.Allow for volunteer opportunities and give options for involvement.Use forums, meetings and other events to invite partners, but make these meaningful.Tell your story, not just the numbers.Ensure a continuity of partner engagements. You will lose corporate memory if you have different people always coming to the table, which means you'd need to start from scratch.Grow new and current networks.Connect with municipalities to streamline any municipal processes.Ensure that the project aligns with corporate and/or personal core values.Be sure to ask for more than money. Can they provide expertise, guidance, and networking. Make them ambassadors.Celebrate milestones with partners.Bring stakeholders to the renewal site. Make it tangible!

Topic Area: 4.2 Industry Specific Suggestions

Industry	Rating	Suggestions for Improvement
Government sector engagement knowledge		<ul style="list-style-type: none"> • Do your research and be sure you understand the processes and mechanisms they must move through. It does a disservice to charities when they go directly to a minister and/or make a cold call asking for money. • Government is extremely busy. If there can be a single representative that speaks for a larger group, this will reduce the complexity and streamline the process. • Ensure your asks are clear with an appropriate business plan and options. • Ensure your board is diverse, skilled, and experience.
Construction sector engagement knowledge		<ul style="list-style-type: none"> • Early involvement. Review plans and gain feedback at the beginning of the process. • Leverage their skills and knowledge. See them as the experts in their fields. • Give them deadlines and hold them to commitments. Their resources are stretched and their availability is affected by the market pressure. • Involve them in delivery, planning, and schedule (sequencing). • If you don't know, don't be afraid to ask. • Use professional associations to spread the message. • Remember that they are concerned with quality durability, and code compliance, except when existing non-conforming is acceptable.
Foundations and funders engagement knowledge		<ul style="list-style-type: none"> • They are passionate about supporting community. However, they are also all different. Their limited resources and donors can have specific organizations and types of projects they want to support. • It's important to ensure the mandate of the foundation/funder is in alignment. Some funders are not able to fund capital costs, while others want to support tangible projects. • Donors are also concerned about the sustainability of the organization. They don't want their resources going towards an unstable organization. Be sure your organization is strong and viable.
Real estate sector engagement knowledge		<ul style="list-style-type: none"> • They are a diverse and supportive group that likes to give back to the community. • However they have an overarching mandate to protect property owners (which includes charities).

Topic Area: 4.2 Industry Specific Suggestions (Cont.)

Industry	Rating	Suggestions for Improvement
Financial sector engagement knowledge		<ul style="list-style-type: none">• It's not all about the money; it's also about heart. Many financial institutions have a non-profit mindset.• They are experts that are diverse with diverse networks.• They may have resources other than cash that can be useful.
Non-profit sector engagement knowledge		<ul style="list-style-type: none">• Include them at the beginning of the process• Maintain ongoing relations and conversations.• Be collaborative rather than competitive. We are all trying to make a difference!• Consider partnerships. They can be profitable.• They are experts in their space and are open to consultation, information and expertise sharing.



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