CANADIAN
FUNDRAISING & PHILANTHROPY

INFORMED ANALYSIS AND BEST PRACTICES FOR THE CANADIAN NONPROFIT SECTOR

FACE-TO-FACE FUNDRAISING – *Janet Gadeski*

# Will face-to-face canvassing work for your charity?

Though the Globe and Mail wrote recently of the "growing army of street canvassers, or face-to-face fundraisers," most Canadian charities are taking a "wait and see" approach to the channel that's proven so effective for entry-level donations in Europe.

The term includes not just street canvassing, but door-to-door and mall canvassing as well. "Today, face-to-face is the most cost-effective fundraising channel for signing up large numbers of monthly donors," asserts **Bryan McKinnon**, VP of **Public Outreach Fundraising**, a Toronto canvassing firm.

The payback comes not from the initial gift, which may be modest, but with the cumulative value of years of monthly giving – the real goal of F2F.

## A Canadian success story

Rebecca Davies of Médecins Sans Frontières lauds the impact of F2F fundraising on her organization. "This year alone, $5 million has gone right to the field because of conversations people have had with street or door-to-door canvassing. I want people to know that we couldn't have raised that $5 million otherwise."

Davies readily allows that the worldwide agency's successful European experiences helped convince her board to launch the tactic in 2002. It works for MSF, she believes, because people recognize the charity's name and understand its mission.

## Making it work for you

Consider the pros and cons, she counsels, just as you would for any other fundraising initiative. Make sure the firm adheres to the ethical codes of the **Association of Fundraising Professionals** and **Imagine Canada**, and in particular that they don't pay commissions, which both organizations prohibit. (Bonuses are another matter – AFP specifically approves them, while Imagine Canada does not specifically disallow them.) Set goals, and hold both yourselves and your supplier accountable for meeting them. Motivate the canvassers with visits to your site, presentations at their site, and messages from the field. And above all, make donor retention a priority.

AFP chair **Andrea McManus** of Calgary concurs with Davies' points. "If you're going to make the investment, you can't do it as a one-off," she states. "Have a plan to monitor and address attrition, as you would in every other channel."

F2F is very much in its infancy in Canada, though there's a huge body of knowledge in some other countries, she continues. "We need to build on that in a way that fits the various cultures in Canada."

Cathy Barr of Imagine Canada emphasizes the need to build donor relationships and avoid short-term thinking. That's why both organizations prohibit commissions. "The concern is that commission-based fundraising is more likely than other types of compensation to lead to excessive private benefit," she explains.

## Public reactions

As far as Barr and McManus know, there's no research on Canadians' attitude towards F2F fundraising. But the online comments on the Globe's article are strongly negative, even contemptuous, offset by some persistent supporters including one who identified himself as a former canvasser for Public Outreach.

Of all the posts, perhaps this one is most telling:

*We live in an antisocial society where people are afraid to talk to each other, so it's natural that the public feels a bit uncomfortable being approached. However, it is funny that people aren't embarrassed to publicly admit on this forum their contempt for people raising money to save lives. People spend $5 on a drink from Starbucks and don't think twice. Why is being asked to help save a life so bad?*

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IN THIS ISSUE

TIP OF THE MONTH – *Leah Eustace*

# Spotlight "small" donors who share in a big way

A few weeks ago, we celebrated National Philanthropy Day. It's an occasion to reflect upon the magic that happens when donors connect with the causes that matter to them. And often, it's the large gifts we celebrate: the million-dollar donation to the local hospital, or the volunteer who spearheads a $100 million capital campaign.

Not that these gifts aren't worth celebrating. They are. But we tend to lose sight of the importance of celebrating our regular donors, those who are giving gifts of $5 or $10 whenever they can afford it.

Here's this month's tip: Spend the extra time it takes to properly thank and steward your "small" donors. You may be surprised at the results.

## Refugee on disability gives every year

At the Ottawa Philanthropy Awards last year, the recipient of the Outstanding Individual Philanthropist Award was an incredible woman named **Tereza Top**. Tereza is a Sudanese-born Canadian who has overcome many barriers in her life: she faced a devastating war before fleeing to Canada, and had to deal with a diagnosis of schizophrenia soon after landing here.

Tereza lives on a disability pension, but that doesn't stop her from being a donor. Each year, she diligently saves her money so that she can donate $500 to each of five different charities.

## Generous in proportion to income

One of many remarkable things about Tereza's story is that the charities that she supports noticed her particular generosity. As a proportion of her income, she may be one of the most generous donors in Canada, but typically, a $500 donor is not one about whom press releases are issued and articles are written.

I've been thinking a lot about those donors who give small amounts a few times a year – donors like Tereza who scrimp and save because supporting their favourite charities is important to them.

Over the past week, I've been asking fundraisers about their "small" donors. I wanted to know about how they treat them and the value of those donors, and I've asked for their stories.

## "Small" donors make a big difference

I've heard of $2 donors leaving $500,000 bequests; $2 donors increasing their giving after being cultivated and stewarded; $2 donors acting as "sneezers" (spreading the word about the charity to others around them), and I've been told, passionately, how important these folks are.

> ***"I've heard of $2 donors leaving $500,000 bequests..."***

When you think about it, it makes sense. Here we are investing $30 or $40 for each new donor we bring on board (less than half of whom will give a second gift). Why wouldn't we invest in our $2 donors as well?

Many charities don't offer receipts (unless asked) for those donors who give small gifts; others don't bother with a thank-you. They claim that they lose money by sending these to their $2 donors. Well, that's true, but they lose a lot less than what they invest in acquiring a brand new donor.

## How to treat your $2 donor

Here are some ways you can treat your $2 donors. I urge you to try some of them and let me know what happens:

- Send them a personalized thank-you and tax receipt;
- Invite them to your annual donor reception;
- Treat them the same way you treat your $2,000 donors;

*TIP OF THE MONTH continues on page 3*

## *About Leah Eustace*

**Leah Eustace** is principal and managing partner with **Good Works**. "A 'fundraiser's fundraiser" with a wide background in charitable fund development, she's worked with clients including the **Canadian Red Cross**, the **Canadian Breast Cancer Foundation**, **CARE Canada** and the **UN Refugee Agency Canada** on social media, direct marketing, donor research and legacy marketing.

She's president of the Ottawa Chapter of AFP and a member of AHP, NTEN, the CMA and CAGP.

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SHORT AND SMART

# How do we lead when turbulence is the new normal?

Leadership pundit **Keith Coats** recalls one of his favourite maxims from **Peter Drucker**: "The greatest danger in times of turbulence is not the turbulence; it is to act with yesterday's logic." Why then, he asks, do we rely more and more on experience, past solutions and hard work when they so often result in more and more of the wrong thing?

The study of past cases, the preferred learning method of business schools, simply reinforces that trend, he argues. Case studies focus our attention in the wrong direction: backward rather than forward.

### Adaptive leadership – what to do when you don't know what to do

That's a clear warning to those who think that businesspeople, simply because they're businesspeople, can bring superior leadership to the nonprofit world. But reliance on the past isn't confined to the business world. Both environments need "adaptive leadership." Coats borrowed the concept from Harvard professor **Ron Heifetz**.

"Adaptive leadership suggests that as a leader you are increasing faced with adaptive challenges that can be defined as 'knowing what to do when you don't know what to do.' In responding to an adaptive challenge new learning is required," Coats explains. It contrasts with technical challenges: those in which the problem can be clearly defined and the solution can be developed out of past solutions.

Today's leaders need both, of course. They also need the recognition that technical solutions don't apply to adaptive challenges. The turbulence of unfamiliar situations, new issues and untried techniques should invite us to step back and see things differently.

### Changing your leadership style

We haven't been programmed to do that. We don't know what to do when our detailed measures and plans based on past experience become redundant. Coats offers four questions to help you determine whether you are leading adaptively.

1. How much open discussion takes place in your executive or management team?
2. What would be evidence of new learning in such forums?
3. What are you doing differently from two years ago?
4. How attentive are you to drivers such as technology, demographics, societal value shifts?

Where does experience fit in all of this? "There will always be insights that we can glean from what has gone before but we need to start to understand what it means to learn from the future," he says. Experience has never counted for less than it does right now.

Lamenting current behaviour and trends is a sign that you're held hostage by the past. "We need to honour the past but we need to know how to learn from the future," he concludes. Engaging the future means asking the right questions and building a process that will support collaborative responses.

*Read the full post at http://www.tomorrowtoday.co.za/2011/11/15/a-warning-to-leaders-turbulence-is-not-the-danger*

## *Recognition important for $2 donors too!*

*TIP OF THE MONTH from page 2*

- Recognized them for their loyalty (do you have a donor who's given $2 a year for 10 years? That's worth celebrating!);
- List them in your annual report (particularly for their loyalty);
- Take advantage of the relatively low cost of social media and email to thank them; and
- Choose two or three of them to call each week for a personal thank-you.

Lee Rose, president of the board for the Ten Oaks Project, says that it's thanks to donors under $10 that Ten Oaks placed second in the 2009 Canada Helps Giving Challenge. "The goal wasn't to raise a huge pile of money; it was really about building awareness and tapping our networks to build relationships with new donors. It was a great way to engage with our program participants, who encouraged all of their friends to give $1, $5, or $10, as we were aiming for the prize for most individual donations. We used Facebook and Twitter, as well as our e-newsletter mailing list to get people in on it."

Ten Oaks also used Facebook, Twitter and its website to thank their donors and express gratitude for their generosity. Many of those donors have gone on to become regular supporters.

The evidence is clear: investing time (and sometimes money) in those donors giving less than $10 is well worth the effort.

EFFECTIVE ORGANIZATIONS – *Jennelle Dippel*

# Why grads don't want your nonprofit job

During a lecture in the communications program I recently completed, our professor tossed out the question, "How many of you would like to work for a not-for-profit when you are done here?"

I innocently glanced around the room, eager for my hand to join a forest of excited limbs waving in the air. Isn't that what all of us feeling-oriented, people-loving communicators want to do? My arm shot up and I counted one, two … three other hands.

## Shared frustrations

Why weren't my fellow communications comrades itching to join the crusade? Well, many of them had tried at one point or another and their experiences had been less than they'd hoped for. They shared the two main frustrations they had encountered in the social sector:

1. *Lack of communication* – They were unsure of their duties, didn't know who to listen to, and generally felt in the way of those in charge (who tended to run around them like headless poultry).
2. *Lack of appreciation* - Some felt that their time and education were actually valued less in the social sector than in the corporate one, and they received little feedback for their work.

I was a bit unnerved by the attitudes of my classmates but nonetheless eager to give the social sector a try. When I was presented with an opportunity to be part of Mercy Ships International, the organization behind the world's leading charity hospital ship, I excitedly accepted.

And? What did I discover running from the voices of my peers into an office of the social sector?

## When communication and appreciation work

Mercy Ships has confirmed that communication and appreciation can in fact be the cornerstones of a not-for-profit. Their mandate of bringing hope and healing is present in the way they build relationships in their small office as much as it is when they perform life-saving surgeries onboard the *Africa Mercy.*

I have no doubt that this abounding internal communication on home soil leads to more successful fieldwork in Africa. My experience at Mercy Ships confirms how crucial it is to build healthy, affirming, communicating environments at an office level.

From the mouth of my boss, Canadian national director **Tim Maloney**, "While the mission of an organization defines its purpose, the capacity to reach that purpose can be traced directly to the quality of the people who commit their talent, time and energy to it."

How unfortunate that future leaders and talent are fended off in some corners of the sector simply because this sentiment is either missing or ignored – often merely because organization and intentionality are lacking within the office!

## Core truths are simple

Having just spent significant time in the classroom I know that a little 101 has sometimes bored but never hurt anybody, so perhaps it is good to pause, read and repeat some big, simple things.

*Big, simple thing number one: Nonprofit work is not always romance. It is different being in an office (where I am) than being on a hospital ship (where I am not). This is perhaps part of the challenge for those of us just entering the field.*

*Big, simple thing number two: If employees and volunteers are not taken care of first, it will likely be an uphill run toward the goal. Communication and appreciation are vital factors in creating either roadblocks or building blocks within an organization.*

Reading and repeating are fairly simple. It's much harder to undo entrenched patterns and bring an organization back to its centre. But taking time is a requisite for making time, as they say.

As a student-turned-social-sector-employee, I am glad to be here. And I am grateful that my experience with Mercy Ships has given me an exceedingly healthy foundation of these, the big, simple things, to build upon in my future within the social sector.

## About Jennelle Dippel

**Jennelle Dippel** is PR & communications coordinator at **Mercy Ships**, an organization providing free surgeries to the world's poorest people along the west coast of Africa. She was born and raised in Calgary, Alberta and now enjoys life by the ocean on beautiful Vancouver Island, British Columbia.

Jennelle holds a degree in communications from Royal Roads University. Writing is her passion and she believes that, from interpersonal relationships to corporations, healthy communication is a fundamental element of happiness and success.

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ONLINE COMMUNICATIONS – *Jonathon Grapsas*

# Ten tips to help you get found, get clicked and win online

There's definitely a science behind online advertising, which is likely why, as a direct response junkie, I love it. Right now I'm running a ton of different forms of online advertising with clients including re-targeting people who have visited their site previously, behavioral display (where we target prospects based on their online behavior), search engine marketing through Google AdWords and social advertising through Facebook.

They're all very different, but with some strikingly similar keys to success. Here are ten tips on how to get found more, clicked more often, and most importantly how to "close the sale."

## Think about the pathway, including the destination

Online campaigns usually fall down because there's too much emphasis on what happens when I land somewhere, or conversely, what's the hook to get someone to click it in the first instance. They should be given equal weighting. Your ad needs to be clear, enticing, and unique. Your landing page needs to be free of clutter, rich in content and easy for someone to complete what you're asking them to do.

## Is it relevant?

In certain instances (like Google AdWords) you can be penalized for producing content and a landing spot that doesn't fit what the advert is displaying. Sure I could advertise free beer at my house, but if the landing page is about helping to free child soldiers, clearly my ad isn't relevant. Clever doesn't work. Ensuring a connection between an ad and a relevant page does.

## Keep it simple

That's the ad *and* the destination. Easy to read, clear language, free of jargon. Don't make it hard for me to read or watch. The moment it becomes too hard, I switch off.

## Rich content

That's striking a balance between good, emotive copy and compelling, riveting imagery and video. Find the hook to get someone in, then keep them there with good content. Video isn't used enough, yet is such a rich, powerful source.

## I need to do it now

If there's an inkling that it can wait till later, game over. Your proposition must tell people the single most important thing that they must do, right now. It makes them sit up from their slouched position and take action (by clicking, then getting their wallets out). Offering any "get out" (by not using strong, urgent wording) is a sure fire way to lose potential supporters.

## Minimize the clicks

That means don't make me work hard. You want to take people somewhere interesting, engaging (sometimes fun), but wherever they end up (say, on a custom built page with a video story), the ability to make a gift needs to be right there, no more than one click away.

## Learn all the rules

For example did you know when running Google AdWords campaigns you should capitalize all words in your ads copy (except small, joining words like an, at, or on). That's been tested to death and always shown that doing it improves overall response. This information isn't hard to find. Subscribe to blogs that talk about this stuff. Buy the relevant "...for dummies" book that relates to this topic.

## Be flexible

The beauty of digital recruitment is that you live in the moment. You don't close your eyes and hope for the best. It's dynamic, it's able to be monitored and updated easily. Don't think the work is done when you've gone live. Test, tweak, refine and learn.

## Set up tracking

That means getting Google Analytics working on the site to which you're sending prospects, and setting up conversion funnels to see which prospect sources result in donations.

*ONLINE COMMUNICATIONS continues on page 6*


## *About Jonathon Grapsas*

**Jonathon Grapsas** is the founder, and director at **flat earth direct,** an agency dedicated to fundraising and campaigning for good causes. Jonathon spends his time working with charities around the world focused on digital, direct response and campaigning stuff.

*If you you'd like to chat to Jonathon you can drop him a line at jonathon@flatearthdirect.com, follow him on twitter @jonathongrapsas or check out www.flatearthdirect.com*

COMPLIANCE – *Esther Oh*

# Private members' bill would give tax deduction for volunteer time

Taxpayers who provide a minimum of 250 hours of volunteer service in a taxation year will be able to deduct $1,000 when calculating their taxable income if Private Member's Bill C-240, *An Act to Amend the Income Tax Act (Services to a Charity or Public Authority)* passes all three readings.

The bill was introduced on June 21, 2011 and has passed first reading in the House of Commons. To be eligible, the volunteer time must be devoted to a registered charity, a nonprofit organization, or a municipality or other public authority (referred to herein as a "Qualifying Organization").

> ***"Every Qualifying Organization… would need to maintain duplicate copies of each certificate…"***

However, this deduction would only be available where the taxpayers received no salary, stipend, or other remuneration in excess of $3,000 in exchange for their services to the Qualifying Organization.

## Thorough paper trail required

Qualifying Organizations would need to prepare certificates in the prescribed form to certify the total number of hours of service performed by the taxpayer. Once issued, the certificate would need to be filed with the taxpayer's tax return each year.

In addition, every Qualifying Organization that has issued any such certificates would need to maintain duplicate copies of each certificate and any other information the taxpayer provided to verify the number of hours of service in case the **Canada Revenue Agency** audits the organization's operations.

## Bill has failed five times

The stated motivation behind the Private Member's Bill is to encourage more people to give not only their money, but also their time in supporting charitable and non-profit endeavours. This Bill has been introduced five times in the past in previous parliaments. The previous versions, which are substantially the same as this one, progressed only as far as introduction and first reading.

Whether or not this Private Member's Bill will be passed is unknown at this time. However, the Bill warrants careful consideration by the government, as it is an interesting initiative designed to encourage the giving of volunteer time to the charitable sector.

## *About Esther Oh*

A partner with **Carters Professional Corporation**, **Esther S.J. Oh** practices charity and not-for-profit law, is a frequent contributor to www.charitylaw.ca and the **Charity Law Bulletin**, and has spoken at the annual Church & Charity Law™ Seminar as well as at the **Canadian Bar Association/Ontario Bar Association**'s 2nd National Symposium on Charity Law. Her volunteer experience includes former service as a board member and corporate secretary of a national umbrella organization, and working with Canadian youth volunteering in developing countries and communities.

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## *Get Google Analytics working*

*ONLINE COMMUNICATIONS from page 5*

Most of the tools you need are available free. Get someone to help set these up for you. But make sure it happens. Spending a chunk of time advertising and not knowing what's really working (beyond impressions and clicks) is a poor use of your organization's resources.

## Follow up, follow up and follow up

Getting a gift from someone in the first interaction you have with them online is tough. Include rigorous follow-up in your plans to turn prospects into supporters, or one-time cash donors into monthly donors. Think about how to capture more phone numbers so you can call people. For those who don't provide a phone number, develop an e-communications plan to continue the conversation. Above all, factor this part of the process into your planning.

Online advertising can be fruitful if done in the right way. Far too many try without working their way through the fundamentals behind it. Follow the steps above and you'll be well on your way to finding a new audience.

DEMOGRAPHICS – *Carolyn Hawthorn*

# Are you missing these critical clues to Gen Y donors?

As the numbers of older donors begin to decline, charitable organizations will need the tools to engage a new generation with great giving potential. The Gen Y donor is a relatively new concept, but one to take seriously. Understanding the Gen Y profile will help equip organizations to engage and cultivate new Gen Y donors, volunteers, employees and leaders.

## Education

Generation Y is one of the most educated generations to enter the work force. Just over 1.1 million students were enrolled in Canadian universities in 2008-2009 according to **Statistics Canada**. StatsCan also notes a steady increase at both undergraduate and graduate levels.

Multiple years of education create a desire to implement specialized skills, talents, and abilities within the work force quickly and efficiently. Yet when job searching, many Gen Ys find themselves caught for that very reason. Too much education and a lack of real world experience can make it difficult to get a job.

Charities interested in engaging volunteers or even permanent staff can offer attractive opportunities to Gen Ys facing that challenge through a number of means:

- Department-specific internships
- Co-ops in collaboration with college or university programs
- Volunteer work matching their education and interests
- Work that is competitive and fulfils specific responsibilities

## Finances

When education increases, so does the debt load that Gen Ys carry in their late 20s and 30s. Statistics Canada reports that across Canada and across all disciplines, average tuition rose 16.8% just in the four years from 2006/2007 to 2010/2011.

A **CBC** article on student debt contrasts the average 2009 debt load of $26, 680 for university and $13, 600 for college with the 1995 figures of $13,000 and $9,000 respectively. Those numbers don't include credit card loans, food or transportation costs, which can add thousands to debt levels.

Thus, Gen Ys enter the period of marriages, mortgages, and money multitasking with more debt already incurred than their predecessors. Most of this debt is through loans, specifically provincial student assistance programs. In general, according to a 1999 study, parental support covers less of the load than summer employment and student loans. Gen Ys struggle after graduation to pay off debts and simultaneously advance their careers.

Within these limitations, a Gen Y $10 donation is a legitimate financial decision rather than an impulse gift. A charity that recognizes that fact through individual thanks and public acknowledgement is more likely to retain Gen Y supporters for the future.

## Characteristics

Gen Ys are accustomed to international travel and view themselves as global citizens. A recent UCLA study showed 70% of Gen Ys in the United States have socialized with someone of a different ethnic group within the last year.

A general social survey from the University of Chicago found students there were nearly unanimous in believing that women and men should have equal opportunities. More individuals believe in same-sex marriage than in previous generations, and serious romantic relationships across different cultures, ethnicities, sexualities and religions are not novel. Gen Ys have grown up with the ability, need, and desire to reach past what used to be described as "our own."

## The Gen-Y-friendly charity

To appeal to the Gen Y traits discussed in this article, charities can

- provide up-to-date training programs
- ask Gen Ys for input on program details and wording

*DEMOGRAPHICS continues on page 8*


### *About Carolyn Hawthorn*

**Carolyn Hawthorn** is a recent graduate from the Fundraising and Volunteer Management program at **Humber College**. Passionate about causes close to the hearts of young adults, Carolyn has worked in the communications department at **The University of Western Ontario Student Union**, her alma mater. Currently an active "Mo Sista," Carolyn is working at Movember Canada.

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SPONSORSHIP CASE STUDY– *Jim McEwan*

# How you can build high-impact sponsorship for small businesses

Sponsorship is alive, well and changing in smaller communities. While much of the material available regarding sponsorship focuses on big corporations and international events, potential benefits for small businesses sponsoring local and regional events are also impressive.

My community, Vernon, is located in the north Okanagan with a population of 35,000 and another 20,000 in the immediate trading area. Much like thousands of communities in BC or in any province, Vernon lists the majority of the business community (a whopping 98%) as small business – fewer than 50 employees. Of those, 86% are five employees or fewer.

So if you're looking for sponsorship, you need to understand the process of small business in a small community. Almost all the time in Vernon, sponsorship seekers relate to business owners who are involved in day-to-day operations. They live in the community, and over than two-thirds have operated their business in Vernon for 15 years or more. They know their community and who's who in their community.

## Hot competition

Since 2006, I have been the executive director of the Funtastic Sports Society – Vernon's equivalent to the Calgary Stampede. With 300 teams and 4500 players, Funtastic is Canada's largest tournament. Funtastic makes a significant contribution to the local economy and receives no government funding. As a nonprofit organization, our mandate is to support local sports and recreation initiatives, and we've donated $1.2 million over 27 years.

In my volunteer role I am VP for the Greater Vernon 2012 BC Winter Games, the first multi-sport event for many of BC's young top athletes between the ages of 9 -17. More than 2,000 athletes, coaches and officials will converge on Vernon and area for four days of competition. While the Games are supported by the provincial government, we are still responsible for generating community sponsorship revenues through the Friends of the Games directorate.

In addition to these two events, Vernon has literally hundreds of events and organizations looking for funding, so the local business community has a challenging time wading through the list. All events and organizations are worthy; all are great for the community, and many offer the same demographics. In recent years government funding has declined, leading to more demands on businesses. Therefore, sponsorship for properties has become imperative.

## The small-town advantage

In Vernon, a business needs to make only a minimal investment to reach the majority of the residents. New businesses are especially interested in sponsorship as part of their launch strategy, as they can reach a great many local residents in a very short time.

An example of this is Cobs Bread, a two-year-old business in Vernon. During the initial meetings in 2010, we agreed that sampling with coupons would be a good test.

*SPONSORSHIP CASE STUDY continues on page 9*

## About Jim McEwan

**Jim McEwan** is the executive director for the **Vernon & District Funtastic Sports Society,** where he has worked since 2006. He is also very involved with the sport tourism scene in the north Okanagan, helping several organizations with their event and sponsorship planning. Jim possesses more than 12 years of experience working on the selling side of sponsorship, including both small community events and nationally acclaimed organizations.

*Funtastic is Canada's largest slo-pitch tournament and music festival, www.funtastic.org.*

*Contact Jim at office@funtastic.org.*

## *Work environment important to Gen Y*

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- maintain an open an diverse work environment
- celebrate donor, volunteer, and employees stories through articles, social media and newsletters.

Understanding the general background of Gen Ys can only result in something positive. At the very least you will boost your organization's ability to interact with that generation in an authentic manner. At most, you'll create passionate, dynamic and dedicated donors, volunteers, employees and leaders for life.

*This article is adapted from research carried out in the Fundraising and Volunteer Management Program at Humber College, Toronto.*

## *Cobs Bread sponsorship a success*


*Cobs Ambassadors prepare to hand out their samples at Funtastic in Vernon, BC. Photo: Funtastic Sports Society*

*SPONSORSHIP CASE STUDY from page 8*

We decided to use individually packaged scones at 8:30 in the morning. I recruited two volunteers to hand out 400 scones with a dough dollar. Cobs Vernon had their best weekend to date during Funtastic. In 2011 we used cinnamon buns as a sample product and surpassed the previous year's numbers.

### Motivations of small-town sponsors

Typical marketing objectives are no different than those of major national sponsors – building brands, generating sales, promoting corporate responsibility or launching new products and services. Often a business will sponsor a cause, event or organization because it is good for the community. In addition to providing a corporate social responsibility program for their company, getting involved with community sponsorship programs such as Funtastic brings an additional element of staff engagement to their business.

In the past few years, though, Vernon has seen a change in the prime reason for sponsoring. These days, owners and managers are more likely to ask, "What's in it for me?" and "What do I get from it?" Corporate responsibility is still important; however, companies are also looking for a return on investment.

### Helping sponsors make it work

With Funtastic, I work with 125 sponsors each year. We have a 90% return rate in sponsorship and take pride in the placing our sponsors' needs first.

Too often, properties simply ask for money because "the company has always given us money." These same properties are surprised when the sponsor asks "what's in it for me?" By contrast, those properties that understand the changing market continue to be successful.

Not all sponsorships are the roaring successes companies would like them to be. There are several reasons why they might have failed. A common one is the "Owner Syndrome" – for example, the owner likes a sport and has the company sponsor an event without due consideration of marketing objectives.

Another reason for failure occurs when a company commits to a sponsorship and neglects to do any promotion prior to the event. They just turn up and hope that the on-site visibility will give them what they want. Generally they presume the property didn't deliver and is at fault. In fact, both are at fault and are equally responsible.

### Like marriage, it's about commitment

According to **Brent Barootes** of **Partnership Group – Sponsorship Specialists**, sponsorship is like a marriage. Both partners need to contribute for it to be successful.

Sponsorship is quickly growing as a desirable form of marketing in small communities. Yet in many ways, it is still very much in its infancy. There are unlimited opportunities for astute organizations to fund their events, and for intelligent companies to increase their credibility, image and prestige through strategic sponsorship.

*This article was adapted from Jim McEwan's session at the Western Sponsorship Congress held in Calgary in October.*

THE BUSINESS VIEW – *James Temple and Janet Gadeski*

# Turn your business volunteers into "advoteers" today

Lately, there's been a lot of discussion concerning corporate social purpose. While the idea is not new, blogger Paul Klein reframes the concept as the balance future leaders hope to find between long-term economic value, widespread community benefit and the development of social capital.

Social purpose comprises three core concepts:

- bringing relevant leadership to fruition
- defining why businesses exist
- expanding corporate responsibility well beyond embedding good social, environmental and economic values into business operations.

We only need to look outside our windows to see the impact of worldwide "Occupy" protests. Whether reflecting upon the myriad of views and experiences that are shaping a complex conversation, or trying to grasp the depth of knowledge that's behind the movement itself, it's clear that a call for individual action is paramount.

## The impact on your organization

When considering the role of corporations in this setting, it's evident that their employees can help transform the way not-for-profit organizations influence and enhance the impact of their work through volunteer initiatives. Charities can accomplish much in little time towards their social mission by making the most of these volunteers' passion, skills, networks, experiences and ideas.

A change in consciousness is helping people move away from wanting to "fix" the not-for-profit sector via an organized event or experience. The model for working with charities is finally being revamped (*which is a great thing I might add – James*). People are now taking personal accountability for their actions, as well as the collective actions of their organizations, within a framework of a long-term approach to sustainability.

All of this has an impact on businesses, not-for-profits and governments alike. It's critical to remember that every organization is made up of a unique group of individuals from its surrounding communities whose combined consciousness helps to shape its values. Adapting to societal, economical and environmental changes helps organizations maintain their impact within the area of corporate social purpose.

## The role of the "advoteer"

This is where an idea that we might call "advoteering" comes into play.

I like to think that advoteering is how an individual acts upon their personal responsibility to advocate for community engagement within the walls of their own organization. Using their personal experiences, networks, passions and processes, a person can volunteer their time on the job to advocate for an issue that matters to them.

Whether it's talking on the phone with a friend or promoting a cause at the water cooler, people can describe the context of complex issues in a way that helps others understand why a specific issue is a priority (or why it's not).

## How and why to support your advoteers

By enabling your board members and volunteers to frame such discussions in their workplaces, you can spread awareness of your organization, its cause, and the nonprofit sector in general beyond the person or two from company X who may be formally involved with you.

That's why it's important to make sure your volunteers understand your organization at the deepest level: its challenges, its impact, its strategy. Increasing national understanding of charities' work and impact was a top agenda item at **Imagine Canada**'s National Summit this November. Well-informed advoteering can play a huge role in closing that gap.

It's a grassroots approach to grapevine communication that reshapes community consciousness and breaks barriers between communities and organizations. Ultimately, they are the same ideas guided by the same values.

*For examples of how advoteering is already occurring in organizations, tune into James' TED talks presented as part of TEDxCalgary.*

## About James Temple

**James Temple** is the director of corporate responsibility for **PricewaterhouseCoopers Canada** and director of the **PricewaterhouseCoopers Canada Foundation**. He oversees a team responsible for integrating good social, environmental and economic values into PwC's decision-making processes.

James is a featured presenter at international conferences, speaking on the value of developing strong corporate-community partnerships. He co-chairs the **Association of Corporate Grantmakers** and sits on the Advisory Board for the **Institute at Havergal College**.

*Contact him at 416-815-5224, james.temple@ca.pwc.com, or visit http://www.pwc.com/ca/corporateresponsibility.*

FINANCIAL REPORTING

# How five Ontario charities won $5,000

Five Ontario charities have received Voluntary Sector Reporting Awards in an annual competition organized by the **CA-Queen's Centre for Governance** and the **Institute of Chartered Accountants of Ontario**, and sponsored by **PwC**. Each winner received a prize of $5,000.

"The VSRA recognition program is based on the premise that it is better to provide examples of excellence in order to raise the bar on financial reporting transparency in the not-for-profit sector rather than making more rules," said **Steve Salterio**, director of the CA-Queen's Centre for Governance.

*"The organizations... are to be commended for their straightforward and open financial reporting."*

The awards, now in their fourth year, were open to registered charities that produce annual reports in Ontario. More than 100 charities were nominated. This year's winners include

*National and international organizations headquartered in Ontario:*

- World Vision Canada, Mississauga, www.worldvision.ca

*Ontario organizations with total revenues over $10 million:*

- Canadian Paraplegic Association Ontario, Toronto, www.cpaont.org

*Ontario organizations with total revenues from over $1 million to $10 million (tie):*

- DeafBlind Ontario Services, Newmarket, www.deafblindontario.com and

- United Way Kingston, Frontenac, Lennox & Addington, Kingston, www.unitedwaykfla.ca

*Ontario organizations with total revenues up to $1 million:*

- Hospice King (Operating as Hospice King-Aurora), Richmond Hill, www.hospicekingaurora.ca

"The organizations recognized by this year's Voluntary Sector Reporting Awards are to be commended for their straightforward and open financial reporting," noted **Brian Leader**, learning VP at the ICAO. "Beyond the people they serve and the charities' donors and volunteers, the not-for-profit sector as a whole benefits from their example."

## Behind the awards

The goal of CA-Queen's Centre for Governance is to raise the bar on Canadian governance research with respect to transparency and financial accountability and convey implications of that research to academics, students and the public. Situated at Queen's School of Business, the Centre conducts basic and applied research on such issues as fraud prevention and detection and improving the quality of Canadian securities regulation.

The Institute of Chartered Accountants of Ontario is the qualifying and regulatory body of Ontario's 35,000 Chartered Accountants and 5,000 CA students. Since 1879, the Institute has protected the public interest through the CA profession's internationally recognized standards of qualification and the enforcement of its rules of professional conduct.

The firms of the PwC network provide industry-focused assurance, tax and advisory services. In Canada, PricewaterhouseCoopers LLP and its related entities have more than 5,700 partners and staff in offices across the country.

*For more information about the awards, visit www.annualreportaward.ca, http://www.pwc.com/ca/vsra; or www.icao.on.ca.*

FIVE MINUTE LEARNING – *Lisa MacDonald*

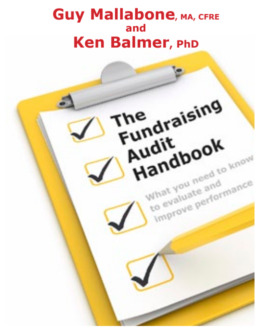
# When being "good" isn't good enough

The equation seems simple enough. The ability of non-profits to grow and deliver services to address their mission is dependent on the resources they have available. With the economy in flux and government funding in question, the focus for fund development staff and volunteers must be on how effective the organization can be in raising private resources.

The more money that can be raised through donations; the more service can be delivered and the mission addressed to a greater degree. To accept status quo of being "good enough" or to fail to recognize the consequence of declining revenues is operating at peril of not delivering on the mission of your organization. It is at this point that authors **Guy Mallabone** and **Ken Balmer** suggest use of The Fundraising Audit Handbook.

According to Mallabone and Balmer, to be aware of the fundamental strategies and tactics used by others and to be well-versed on best-practices, will give you the insight to take a fundraising program from "good" to "great." Those who fundraise in the traditional, narrow sense are in danger of being left behind by those who have embraced comprehensive fund development strategies. With *The Fundraising Audit Handbook* you are promised "relatively easy entry into an increasingly complex game."

The authors have designed this audit tool to "optimize opportunity and prevent opportunity loss." More specifically, it will help your organization to:




- Better understand the nature of comprehensive, integrated fund development;
- Review its track record and understand current fundraising patterns;
- Compare current practices with accepted fund development theory;
- Establish a benchmark for future tracking;
- Identify gaps, issues or challenges that should be addressed; and
- Move towards creating common goals and strategic direction.

While advocating The *Fundraising Audit Handbook* as a useful and important tool, Mallabone and Balmer also crystallize the role that good leadership plays. To be passionate in your commitment, and to demonstrate a willingness to create a "can-do" culture are all parts of being a responsible, successful leader.

*Premium Leadership Service Members can order The Fundraising Audit Handbook for only $27.99 ($2 off retail) Click here for more information, http://www.canadianfundraiser.com/Bookroom/productDescription.asp?crypt=DXpwDhYdd2t9f2seeHduBAMUfxgdFXhwdH92cwUQdXZ9eWYDFmUNBA0=*

PROFESSIONAL GROWTH

# Learning opportunities for fundraisers and other leaders

**AFP Foundation for Philanthropy - Canada**, Webinar: *Fundraising Ratios, Media Coverage and CRA's Fundraising Guidance*, **Mark Blumberg, Ken Mayhew**. Thursday, Dec 8, 12:00 - 1:00 PM.

*For more information, info@afptoronto.org*

**AFP Vancouver Chapter**, *Webconference: Secrets of Success in the Small Shop*, **Sandy Rees**, Nonprofit coach, consultant and author. December 6, 9:50 am - 11:30 am, Vancouver: YWCA - 535 Hornby, 4th Floor Kamploops: Royal Inland Hospital Foundation - 311 Columbia Street. Professional and volunteer fundraisers who work in small nonprofits will benefit most. $35 + HST.

*http://www.afpvancouver.org/Upcoming-Events.aspx*

*Webconference: Blended Fundraising - Building a Major Gifts Program through Integrated Solicitations,* **Adam Burk**, President, Central Ohio Chapter of Association of Fundraising Professionals. December 14, 9:50 am - 11:30 am, Vancouver: YWCA - 535 Hornby, 4th Floor Kamploops: Royal Inland Hospital Foundation - 311 Columbia Street. $35 + HST.

*http://www.afpvancouver.org/Upcoming-Events.asp*

**Volunteer Manitoba**, *Employee Retention - How to Motivate and Develop Your Top Performers*, **Lisa Lewis**, Beyond Excellence. Tuesday, Dec 6, 9:00 am - 4:00 pm, Volunteer Manitoba Training Room, #207, 5 Donald St. S. $125 (includes Materials and light refreshments).

*http://www.volunteermanitoba.ca/newsite/Keeping_top_performers.htm*

**Blackbaud**, *Webinar: Canadian Executive Spotlight Series: People, Process and Technology*, **Jim Bush**, Nonprofit Consultant, Winkler Group. Tuesday, December 6, 1:00 PM.

*To register, www.blackbaud.com*

**Vantage Point**, *Evaluating the Executive Director*, **Derek Doyle**. Wednesday, January 11, 2012, 1:00 - 4:00 pm, 1183 Melville St., Downtown Vancouver. Members: $80; non-Members: $95.

*http://www.thevantagepoint.ca/content/evaluating-executive-director*

IN BRIEF

# We're still giving, often on a whim

Despite a volatile market, 71% of Canadians plan on donating the same amount or more compared to last year. These results from an online October poll were released by **BMO Harris Private Banking** to mark National Philanthropy Day earlier this month.

The study, conducted by **Leger Marketing**, found that in the past 12 months, Canadians gave an average of $487 to charitable organizations. However, the report also found that 54% of Canadians don't have a strategy when donating, and instead give on an ad hoc basis.

"It is encouraging to see Canadians giving despite the current economic environment," said **Marvi Ricker**, vice-president & managing director of philanthropic services, BMO Harris Private Banking. "However, I do encourage those that donate to sit down with a financial professional and develop a giving strategy that can become part of a financial plan, including a disciplined and strategic examination of goals, objectives, interests and options."

*http://www.investmentexecutive.com/-/canadians-keep-giving-despite-challenging-economy*

## Canadians among honourees of outstanding volunteer fundraiser awards

**Jamie** and **Patsy Anderson** of Toronto, ON and **Jeneece Edroff** from Victoria, BC are among the recipients of the Association of Fundraising Professionals' (AFP) International 2012 Awards for Philanthropy.

"Each of these honourees has chosen to make a difference in the world by getting involved and motivating others to join with them in pursuit of their noble causes" said **Andrew Watt**, FInstF, president and CEO of AFP.

Jamie and Patsy Anderson have been named "Outstanding Volunteer Fundraisers" for setting new benchmarks for fundraising in the fields of mental and pediatric health. Janeece Edroff is this year's "Outstanding Youth Philanthropist" (aged 5-17) for her courage in overcoming the challenges of neurofibromatosis type 1 (NF1), a debilitating genetic disease, and raising more than $6.7 million to help children and families.

The Andersons and Edroff will be honoured at AFP's Celebration of Philanthropy on March 31, 2012 during its *International Conference on Fundraising* in Vancouver, British Columbia.

*For information about AFP's other international award honourees, go to http://www.afpnet.org/content.cfm?ItemNumber=6576*

## Looking for Canada's "Top 20 under 20"

**Youth in Motion** has issued the official call for nominations for Canada's Top 20 Under 20 Awards 2012. Applicants who have demonstrated significant levels of innovation, leadership and achievement would be considered worthy of this award.

Youth in Motion's mission is to give Canadian youth the skills and support they need to achieve success in their lives, education and careers; while encouraging and facilitating their efforts to be positive change makers and contributing citizens.

The deadline for applications is 4:30 pm, January 22, 2012.

*Award applications can be downloaded at www.top20under20.ca*

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