CANADIAN FUNDRAISING & PHILANTHROPY*

INFORMED ANALYSIS AND BEST PRACTICES FOR THE CANADIAN NONPROFIT SECTOR

VOLUMNEER MANAGEMENT – *Janet Gadeski*

Know your leadership style, your volunteers' learning style

Over one-third of current volunteers will not donate time next year, says a study by the Stanford Graduate School of Business. The likely cause of that, says Denny Young of Humber College's Fundraising and Volunteer Management Program, is poor volunteer management.

A 2004 research report, *Volunteer Management Capacity in America's Charities and Congregations*, seems to support his view. How many charities match volunteer skills with appropriate assignments, according to its findings? 45%. How many recognize the contributions of volunteers? 35% Measure their impact? 30%. What about providing them with training and professional development? 25%. And training paid staff to work with them? Just 19%.

In other words, fewer than half of U.S. charities implement even the top-ranking principle of volunteer management, and it goes downhill from there.

Some think, some talk, some do

Speaking at the **Humber Initiative on Philanthropy,** Young proposed one way of identifying and managing people. Your volunteers, he says, come in three types: thinkers, relators and leapers.

Thinkers prefer written communication. They learn best alone, taking time to process new information. They value data and logic. In a group, they are quiet. You'll need to give them time and encouragement to succeed in new situations.

Relators, on the other hand, communicate by talking. They learn by processing information in a group and value relationships and feelings. They are extroverted story tellers who need recognition and consensus to thrive.

Finally, leapers communicate both by talking and e-mail. They learn by trial and error, preferring progress and movement. Like relators, they are extroverts – but they'll be the ones taking charge while the relators tell their stories. They need activity and pacing to be effective and satisfied.

Teachers and farmers, daredevils and coaches

Then there's you – the leader of volunteers. What's your style of leadership? Are you a teacher, a farmer, a daredevil or a coach? Knowing your leadership style can help you understand what works and what falters with those thinkers, relators and leapers.

Teachers are intelligent, intuitive and reliable, Young says. Their flexible, confident, consistent style works best with an insecure team where skills and experience are limited. Teachers are ideal leaders of teams whose confidence and ability needs to be developed. Meetings with teachers at the helm are structured, leader-led and interactive.

Farmers have a lot in common with teachers. Practical, resilient and hard working, their relaxed, nurturing, patient style works well with teams where experience is limited even though skills may be developed to the medium level. If you're a farmer, you'll do best leading a team that needs focus and consistency. Your meetings will be very much like those led by teachers.

Daredevils are very different. Fearless, strong, charismatic, they have a persistent, passionate and intense style that clicks with more experienced and skilled volunteers, especially problem solvers. They are ideal for teams that need goals and motivation. If they lead a meeting, you'll see it break down for small group work, then come together again.

And who can lead a team so experienced and highly skilled that its members are actually over-confident? The coach – the one person in that group without an outsized ego. A coach comes across as experienced, secure and strong. A team of egotistical people in need of cohesion and focus does best with the determined, focused, tough leadership style of a coach. With all the talent in the room, a coach had better share leadership, and fortunately is comfortable doing so.

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DONOR ACKNOWLEDGEMENT – *Andrea Waldin*

B.C. Children's Hospital Foundation wows kids, celebrates donors with interactive donor wall

Phone solicitation, bake sales and 5K walks are just a few of the traditional ways that hospital fundraisers attempt to reach benefactors. But in an Internet age, when time is of the essence and most potential donors are plugged in, fundraisers need to up the ante for quick and attention-grabbing campaign elements.

The interactive donor wall at the B.C. Children's Hospital draws the viewer with its superhero theme

In April 2008, the **B.C. Children's Hospital Foundation** (BCCHF) launched its *Campaign for B.C. Children*, a $200 million initiative to build a new children's hospital and to establish and equip specialized pediatric care facilities in regional hospitals and clinics serving British Columbia's far-flung child population. The campaign has a superhero comic-book theme designed to resonate with children and entertain adults.

While traditional means of outreach have helped to make the community aware of the campaign, BCCHF's donor relations team sought a more provocative way of communicating with hospital employees and visitors.

"We had a temporary space in the hospital that we could use for keeping the public and hospital staff up to date on the Campaign for B.C. Children," says donor relations coordinator **Debra Kerr**. "We wanted to do something outside the box and use technology, so we developed the idea of an interactive donor wall."

The interactive donor wall had to do more than just use digital signage to list donors and monies raised. It had to attract the attention of passing visitors and encourage donations, profile key donors, educate the public about the capital campaign, and keep everyone up to date on the progress of the new hospital construction and campaign proceeds. As well, the space had to be inviting for parents and children alike.

Enter the interactive professionals

To help develop the wall, the foundation brought in **Shaun Mavronicolas** and his team from **2C Visual Communications** in Vancouver, along with **Scala**, 2C's digital signage software partner. "From a digital standpoint, interactivity was of primary importance," explained Mavronicolas, 2C's creative and technical director. "It had to be simple and easy for kids and adults to interact with the content, and it had to be engaging at the same time."

Mavronicolas recommended 2C's *diVA*™, an interactive software and hardware system that creates a responsive environment – an area that interacts with people who use it or pass by it. By integrating a mural with simple floor decals, sensors, LCD screens, video, DMX lighting and other special effects, the system could educate and entertain hospital visitors and staff in keeping with the campaign's "Be A Superhero" theme.

With diVA, user interaction changes content on different screens and synchronizes it with lighting and sound effects. Depending on which decal a visitor stands on, different parts of the wall come to life. For example, lights may shine on the superhero characters in the mural, or a rotating ambulance light may activate along with content changes.

In-house update capacity a must

While outward appearance of the interactive mural was important, the donor relations team also wanted the ability to remotely update any content appearing on the LCD screens. So Mavronicolas planned to integrate Scala's content management and design software for digital signage. With its open architecture, this software gives the BCCHF donor relations team the opportunity to control multiple LCD screens and provide varying content feeds to each screen.

The donor relations team, the foundation's information services department, 2C and other vendors spent the next six months creating the interactive mural. The final product is a display 10 feet tall by 15 feet wide featuring four LCD screens, four audio speakers, two motion sensors, four distance sensors, lighting and a cast of everyday men and women who are the heroes of BCCHF.

City sounds, scenes surround stories

So, how does the mural work? Floor decals drive the interactive component of the mural, but it's the hidden sensors that "wake up" the mural when someone enters the space. The hidden sensors also monitor the floor decals, which are nothing more than stickers on a concrete floor.

Two motion sensors sit high above the mural to detect anyone who enters the designated mural space. Short loops of content begin to play on the main screen and tell viewers how they can interact with the mural.

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NONPROFIT SECTOR CHALLENGES

No Summit 2009, but plenty of work behind the scenes

One year after the Summit co-hosted by the **Association of Fundraising Professionals**, **Imagine Canada** and **Volunteer Canada** (***Canadian Fundraiser***, June 15, 2008), there are no plans for Summit 2009.

The three co-hosts had envisioned the second event as a national gathering where they would report their progress on objectives outlined in *Advancing the Sector: An Action Plan*, a summary of the first Summit input issued last July (***CF***, July 31, 2008).

But Imagine Canada's recently appointed CEO **Marcel Lauzière** explains that his organization's strategy has shifted away from a national event and towards convening regional fora and symposia to advance those objectives.

"We need to be much more effective in terms of linking and mobilizing people to understand what our public policy agenda should be," he says. "The size and complexity of this country is a challenge but also an opportunity. Our ten provinces give us ten laboratories for innovation and best practices. We need to capitalize on those differences."

Standards, self-regulation

The extensive Summit discussion of a national standards program has expanded into a scheme that would cover governance, human resources and volunteerism as well as financial accountability.

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Viewers trigger sound, lights, video in superhero installation

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At the same time, a soundscape consisting of muted city sounds such as skateboarders cruising by, buses driving along and people chatting will begin to play. The sounds are subtle so that they do not compete with audio coming from the main screen.

Another set of sensors is mounted at about hip level along the mural walls to monitor the presence of anyone standing on a floor decal. The floor decals give viewers directions such as "Stand here to play." There is a decal for each screen, four in total. When a person is detected on a floor decal, the video content associated with that decal/sensor begins to play with the connected screen.

Viewers have the option either to stand on a decal and watch all of that video content until the end, at which point they are instructed to move onto another decal to see more videos, or the viewer can leave where he or she is standing before a video concludes. If that happens, new video will appear and encourage the viewer to move to other areas of the mural. Finally, if no movement is detected in the mural space for 15 seconds, the mural reverts to its default setting – lighting turns off and audio/visual content ceases.

Three smaller screens extend the printed mural over the digital canvas. Because the mural is made up of a building and windows, the smaller screens show video with animated windows to give the effect of building occupancy and lights coming on and off. From time to time, a superhero flies past a window. The large center screen plays a content loop of children reading.

Easy mural management

While the technology behind the mural is complex, editing and uploading content is quite easy. Although the main hub for managing the interactive donor wall lies within BCCHF's information systems department, the donor relations team can update content regularly for all four LCD screens from anywhere in the hospital that is connected to the network. Once the team determines what new content will include, the final updates only take 10 to 15 minutes to upload into the network with the content management and player software.

"The software is straightforward and simple for what we need to do," says foundation web and technical support specialist **Chris Sweeting**. "I check the software daily to make sure it's running, but other than that it manages the wall on its own. It's fairly simple."

All in all, Kerr says the donor wall's reception by patients, hospital staff, donors and the community has been positive. "The mural adds an element of fun to the lobby, and kids really seem to enjoy it. We've had great success conducting media interviews in front of it, so that has helped further the message about the Campaign for B.C. Children."

Andrea Waldin is the vice president of marketing for Scala Inc. and oversees the company's worldwide marketing. For more information, contact Debra A. Yemenijian, Schubert Communications, 610-269-2100, ext. 224, debray@schubert.com

To see the mural in action, http://www.2c-visualcommunications.com/index.php/diva/project_detail/266/

GOVERNANCE – *Jane Garthson*

Should we ban people from serving on our boards?

Many organizations have a policy that prevents certain people from sitting on the board. Initially this may seem unethical. Certainly some of the dangers are evident: will people be denied the chance due to skin colour? Sexual orientation? What if the chair doesn't like people from that family, or doesn't want any board member who seeks to change the organization? Indeed, the ability to ban people may be very useful to an incompetent or over-controlling board. It could prevent other skilled people from joining and possibly shifting the power structure or exposing the incompetence of current members.

But there are equal dangers in having no restrictions: will a group of people opposed to the organization and its mission run a slate of candidates and, if successful, close the organization or subvert it? Good bylaws, bylaw compliance and good election processes can save an organization for its original purpose.

Preserving core principles

Many organizations have restrictions on memberships, and the board is elected or appointed from the members. One possible tactic is to ask all members to sign a pledge that they adhere to the ethics code of the group, so both your membership and your voters at AGMs are aligned with the organization's values.

However, in large or geographically dispersed organizations, it can be difficult to get a signature from every member every year. Further, the form used may not be very detailed.

I strongly recommend that people be asked to apply for a board appointment, and that the application include a confirmation that they support in principle the vision, mission and values statements of the organization.

You could also ask them to sign a pledge that they will follow board policies, including conflict of interest. It is my understanding (and this is not legal advice) that you can word the bylaws in such a way that even external appointments to your board do not become effective until such a form is signed.

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About Jane Garthson

Jane Garthson is President of the Garthson Leadership Centre, dedicated to strengthening our communities through enhanced governance and ethics in our community benefit organizations.

More information about the Centre's consulting, training and interim leadership services is available at http://www.garthson-leadership.ca or by calling 1-877-645-5417.

Focus shifts to regional engagement

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Key principles include a peer review process, different lenses to accommodate different sized organizations, and an emphasis on strengths rather than deficits. Lauzière predicts the launch of a provisional independent standards board early in 2010.

Public policy, government relations

Imagine Canada has created an advisory council of 25 members drawn from across the country and throughout the sector, Lauzière says. It will meet for the first time at the end of May. Another advisory group has helped plan and secure funding for a series of pan-Canadian symposia and regional fora focused on Imagine Canada's public policy agenda. He hopes those gatherings will help engage and mobilize people throughout Canada.

"We haven't been effective at that in the past year," he admits. "We need to broaden out beyond Toronto and be much more present in regions across the country." Imagine Canada's strategic plan now includes the goals of strengthening the voice of the nonprofit sector, serving as a strong forum and meeting place for the sector and acting as an enabler for the sector.

For Lauzière a key question will be how to spread what is already working in one area to other regions. "The economic context doesn't make things easy," he notes. "Travel is especially difficult. But there is a lot of enthusiasm for doing things differently, and a lot of exciting initiatives happening at the provincial level."

For more information, Marcel Lauzière, 613.238.7555 x228, mlauziere@imaginecanada.ca

Some people just aren't right – think it through, then craft careful policy ↩

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Even so, someone may be able to sign, yet be deemed unacceptable by some in the organization for reasons other than skills or competence. Suppose someone fully supports the mission of a faith-based organization working in international development, yet does not support the faith itself, or the basic tenets of that faith? Is that acceptable? I believe the organization would need a significant dialogue on the matter, perhaps on a case by case basis. Different NGOs might reach different, equally valid, conclusions.

Good reasons, sound policies for restrictions

The key here is to have policies with clear explanations for each restriction. The policies, of necessity, must be unique to each organization, and the restrictions reviewed and updated as necessary. Such a document can be made readily available to any potential board candidate.

Human rights bodies sometimes give advance approval for an organization to discriminate in some manner particular to their work. For example, some organizations serving women victims of violence feel that the women should not have to deal with male counsellors, and receive approval to hire only women. But the organization can choose to apply or not apply that approval depending on the nature of client contact. It may not be needed for board members.

> ***"I would be wary of someone who has sat on several boards but cannot provide any reference from past board service."***

What about restrictions based on other affiliations? If you join one national political party, you usually cannot join others. If you are not in good standing with your professional college, your professional association likely doesn't want you as a member either.

Incompatible memberships hard to define, track

Statistics on volunteering show that people who belong to one nonprofit are quite likely to belong to several, often unrelated. I have heard of nonprofits that have no political affiliation nevertheless wanting to keep out people who belong to political parties that they feel are opposed to the work they do.

Feelings would be even stronger if the individual belonged to some group deemed abhorrent and despicable by most of the general public, and reviled by the media. But could your board ever agree on a list of such organizations? Could such a list be useful in a time when Internet groups are formed and dissolved daily? Could you possibly find out which candidates belong to which groups when membership lists are often secret or may use aliases rather than real names? Even when membership lists are public, some people will have asked to be left off and kept anonymous, and may have the legal right to do that under privacy laws.

Legal reasons for ineligibility

Some people, such as undischarged bankrupts, are automatically banned from boards. It is increasingly common for charities to require police checks for their staff and volunteers. A conviction is not necessarily a reason to refuse someone a board position: a minor bar brawl decades earlier is not the same as a conviction for fraud. What about an organization that assists alcoholics – should it elect a board member with a conviction for drunk driving? What if such a practice prevented almost everyone with a history of alcohol abuse from serving? Would it make a difference if the conviction were recent?

Organizations have a right to collect information from a candidate and to collect public information about a candidate, but critical data could easily be missed. Candid discussions with the candidate are likely the best way to learn their views on the issues. Only determined trouble-makers would sign a values statement with which they disagree.

Volunteer history indicates support for cause

In many organizations, it is difficult to get on a board without a history of past volunteering. If people have given their time, they likely believe strongly in the cause. Their volunteer record is an excellent way of learning if their attendance is good and their commitments kept.

Don't rush to disqualify people who voice disagreement with a board. They may be raising valid points. Your board will not benefit from someone who is silent except for "me too" voting; directors need to ask challenging questions.

Reference checks may help identify trouble-makers. I would be wary of someone who has sat on several boards but cannot provide any reference from past board service.

Bylaws should support caution

All of this due diligence, likely supervised by the governance or board development committee (or in older terminology the nominating committee), is for naught if anyone can get elected.

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LEARNING BY DOING

Humber students put HIP new spin on philanthropy

There's no better way to learn about fundraising and special events than by planning and running a fundraising special event. That's how a team of graduate students in the Fundraising and Volunteer Management Program at Toronto's **Humber College** created the first annual *Humber Initiative on Philanthropy (HIP)*.

On May 13th they proudly welcomed 80 fundraisers to an impressive event where every aspect had been organized by the students – marketing, sponsorship, speaker recruitment, hosting and logistics for the day-long conference.

Sessions included presentations on youth and volunteer engagement, co-location strategies, social media, branding and data analysis. Special guest 13 year old **Bilaal Rajan**, author of the book *Making Change*, closed the day with his reflections on the power of individual passion.

Event swelled scholarship fund

The students recruited a dozen major sponsors, including lead sponsor **Canadian Fundraising & Philanthropy**. Thanks to their asks, sponsorships covered all the conference expenses, leaving over $7,000 of participant registration fees for the coffers of the *Kevin Allen Scholarship for Student Excellence in Fundraising*.

Professors **Denny Young** and **Ken Wyman** praise the efforts of the students and are especially impressed with the team's ability to set goals and achieve them. "They have surpassed all expectations. They earned enough sponsorship to break even on the event so every ticket they sell is essentially going straight into the scholarship fund. It's remarkable. That doesn't usually happen with new events," says Young, the event management instructor.

Wyman believes that the students' success is proof that hands-on learning works. "I could have given them an essay or a multiple choice quiz, but that wouldn't achieve the same set of goals," he says. "Each student can be proud of this event; it will look great in their portfolios, but more important it prepares them for exactly the work they will do for charities."

The students hope they have laid the foundation of a successful annual event for future classes in the program. *[AFP chapters take note: these graduates will be great assets to your conference planning committees. – Ed.]*

For more information, http://programs.mediastudies.humber.ca/fundraising; program coordinator Ken Wyman, 416-675-6622 ext. 3013, ken.wyman@humber.ca

Find balance between rubber-stamped slate and wide-open process

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Many bylaws are very loose, allowing nonmembers to run as long as they become members after the election, and allowing nominations from the floor. And some, very unwisely in my opinion, have one-year terms, so the whole board is up for election every year. If you combine such processes with unlimited use of proxies, you put the organization at risk of being taken over by one person with more proxies than the number of people in attendance at the AGM.

Bylaw clauses such as membership in advance (if membership is applicable), limitations on number of proxies, staggered two or three years terms on the Board, and requirements for nominations in advance can provide some risk management without harming democracy.

Inform voters about candidates

Voters also need to have information about the candidates. Ask candidates for bios and for written answers to questions such as why they want to serve on this board, and circulate that information in advance to voters.

Many boards recommend a list or slate of candidates that they feel they have vetted properly. Voters can then more easily decide. If they believe the board is doing a good job and trust that directors' recommendations are wise, they will likely support them. If not, they can easily see which outsiders are running for the board.

If your bylaws provided for a self-perpetuating board, the directors still need to carry out full due diligence on candidates, but with much less risk of unexpected results at an AGM. However, this approach often prevents fresh ideas and diversity. Directors need to make an effort to recruit beyond their personal networks.

I believe a good dialogue on board recruitment policies, supported by case by case evaluations, is far superior to blanket bans. However, you must have clear vision, mission and values statements to evaluate each case against, or you will just be looking at personalities and personal biases. And that isn't good enough.

FAITH FUNDRAISING – *Douglas Flanders*

Donor care 101 for faith communities

Faith communities often neglect their donors. This is not done intentionally. Lack of resources, including administrative support, a lack of organizational focus on good fund raising methodology, a strong sense of privacy about giving, and a low emphasis on donor recognition all play a role.

However, there are simple things faith communities may do to cultivate better relationships with their donors and still respect cultural norms related to fundraising under which many such groups function.

Database management is vital

First, keep your donor data base up to date and accurate. Include all those who are associated with your group, whether they be active members, occasional participants or those who would look to your group only in times of need. They do not all have to receive communications from you every time but you need to know who your constituency is.

Follow up with new people and respond to their requests. If someone has attended your place of worship for the first time and given a gift that may be receipted, telephone your thanks. This is especially important for those who live in your group's catchment area. The conversation may generate useful information and if someone asks for information, send it out.

Integrate new people into your database. If you receive new members, ask them to indicate how they will support you both financially and otherwise. Do not assume they will do this on their own. If someone has been attending and contributing regularly, a friendly contact might encourage more formalized giving.

Offer options for convenient giving

Make it as easy as possible for people to give. Many faith groups use weekly offering envelopes. Do you also provide opportunities for automatic bank withdrawals? Postdated cheques? Credit cards? Tribute gifts? Gifts of publicly listed securities? Online donations? Weekly envelopes assume weekly attendance, which is no longer the norm for many faith group participants. To use them as your exclusive or primary gift vehicle may preclude other donations.

Develop a "Friends" list for your group. Include people such as non-resident members, former members, children of members, and non-member volunteers in your community outreach programs. A personal invitation seeking financial support for a program or project on special occasions or holy days may generate gifts. Thank donors of all gifts by letter; include information on how their gift has been used to effect change.

Consider establishing a bequest giving program. Encourage members and friends to remember your group with a gift through their estate plans. Bequest giving can become a part of your group's culture through regular communication about the merits of such gifts and the process for making them.

Information for donors, board

Share information with your donors. Use orders of service, newsletters, annual reports or other forms of internal communication to talk about fundraising and tell your stories: "Because of your gifts, we have been able to do ..." Do not assume supporters know how their gifts are used.

Share information with your governing board about your resource development program, its success, and your work in donor cultivation and thanking. Does every member of your governing board support you financially?

Encourage gifts in kind. Does your group need equipment or supplies? Let your donors know; let them know the process to give such gifts and how they may be receipted.

Remember to say thank you

Finally, and again, thank your donors. Repeat: *thank your donors.* For example, telephone to thank for gift intentions (pledges), for new intentions that come in through the year. Send a special letter for individual gifts over a certain amount;

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About Douglas Flanders

Douglas Flanders is Director of Major and Planned Gifts for The United Church of Canada. He has served as Director of Leadership Giving for The Arthritis Society and Director of Development with Plan Canada.

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BOARD EFFECTIVENESS – *Kimberley MacKenzie*

Is your board of trustees an asset or a liability?

Most fundraisers realize that a good relationship between the board of trustees and staff is essential for a thriving organization. We also know it is important to have clearly defined roles and responsibilities and to give board members enough information to make decisions while not overwhelming them with the minutiae of administration. Most of us also expect our board will be a great help in reaching the charity's financial objectives.

Yet I still hear fundraisers complaining that their boards are a liability. In fact, I don't remember anyone ever proclaiming they love their board. Here are some actual comments I've heard recently:

"My board has no clue what is needed to raise money."

"I dread our board meetings; they are such a waste of time."

"I'd never take my president on a fundraising call...she would blow it for sure!"

This is not just disrespectful and dismissive; it's a disgrace to our sector.

Look through your board's eyes

Maybe it will help to try seeing your organization through the eyes of your most important and passionate volunteers: your board. Imagine for a moment that your child is extremely ill. You rush her to the local hospital where you are greeted by a calm nurse who immediately finds expert medical attention. The doctor informs you that the situation is is life-threatening. He will do what he can. Hours later your child is back in your arms and expected to make a full recovery. You are so grateful and overwhelmed by the experience that you want to do something to give back.

You make a donation and ultimately after a series of lunches and arm twisting you end up on the foundation board. Once on the board you are given a gigantic board manual, asked to attend monthly meetings, open up your address book and go out and raise $150 million for a new cancer centre. You may as well have been asked to perform surgery.

Rather than feeling inspired you now drag yourself to meetings feeling used, burdened and looking forward to the end of your term.

This kind of situation is both common and wasteful. The people who sit on your board sincerely want to have an impact and if we allow this kind of thing to happen, we are failing them.

Rather than complaining about our trustees we should be asking ourselves, "What can I do to help my board be as successful as they can be?" Here are a few ideas.

See your board as individuals

Each member brings a different skill set to the organization. Try to match your revenue streams to the talent of each individual. For example a social philanthropist may be able to chair an event.

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About Kimberly MacKenzie

Kimberley MacKenzie is the volunteer Canadian ambassador for SOFII, the Showcase of Fundraising Innovation and Inspiration, (www.sofii.org), and the executive director of the Lake Simcoe Conservation Foundation in Ontario. This article first appeared in Professional Fundraising UK in the May 2009 issue.

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Say "thank you" more often than "please"

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to local businesses who may support you and to those who for whatever reason may not be renewing their financial support. And do not include another ask in your thank you for their most recent gift.

Use pre-existing communications to say thank you. Include a covering letter of thanks when sending out income tax receipts. Outline how the donors' gifts have made a difference. Include a thank you with any interim statement of giving you may distribute during the year. Make sure your donors know that you have received their gifts, that you appreciate them and that you have used them wisely for the betterment of your mission.

Obviously, not every suggestion will apply to every situation. However, implementing even a few of these suggestions over time should improve your faith group's level of support.

THE ECONOMY

Hire more rain-makers during recession, AHP study says

As the recession's grip tightened on nonprofit hospitals and health care systems in Canada and the U.S., high performing fundraisers in charge of major gifts and planned giving programs were often their most effective and efficient rain-makers, according to the **Association for Healthcare Philanthropy**.

This finding comes from the AHP Performance Benchmarking Service for fiscal year 2007, which takes in the early months of the current recession. The AHP's annual surveys examine the performance of organizations such as hospital-affiliated foundations that raise funds for non-profit health care facilities.

Health care executives and boards should think twice before downsizing their fundraising staff and mix of fundraising activities to cope with the recession, says AHP president and CEO **William McGinly**. The highest performing fundraising organizations put stronger, longer-term emphasis on cultivating major gifts, investing on average three times more than other surveyed organizations but earning five times more in high-dollar gifts.

The year's AHP Performance Benchmarking Service data confirm that a difficult transition was under way in 2007. Compared to earlier years, fewer donated dollars were coming from government, businesses and foundations, while the cost to raise a dollar was rising and return on investment was drifting downward for annual giving and special events.

Despite this trend, the benchmarking survey clearly showed that highest returns from annual gifts and special events were earned by fundraisers who invested the most in staff and resources devoted to these programs.

Annual giving and special events remain worthwhile sources of contributions from new and repeat donors, McGinly says. While not achieving the highest ROI, they provide the base in order to succeed with major gift and planned giving solicitation.

AHP launched its Performance Benchmarking Service, which establishes standard metrics and industry best practices for fundraising success, in 2003. 46 U.S. and Canadian nonprofit hospitals and multi-facility health care systems took part in the 2007 benchmarking program.

For more information, contact: Kathy Renzetti, 703-532-6243 or 571-216-0146, or Bill McGinly 703-626-8160; www.ahp.org

Staff-board relationship is the most important one in fundraising

BOARD EFFECTIVENESS from page 8

A corporate CEO might be interested in framing some corporate social responsibility policies.

Use your board manual differently.

Once you've recruited your board members, don't just hand them a hefty manual full of theory and policies. They won't read it. You probably don't even read it. Members need to be taught how their manual can be practically applied and serve as a tool rather than a doorstopper.

Connect directors to the mission frequently

Open up the boardroom to a little fun by bringing in beneficiaries or playing music and showing slide shows of your charity's work before the meeting. Send directors short weekly emails telling them something fabulous that happened as a result of their leadership.

Get to know your members

Make it a point to steward and get to know your board. Phone one member a week to ask a small favour or a bit of advice. Involve them in small meaningful ways between meetings. They will learn more about the business of fundraising and you may discover a connection or talent that doesn't show up in the boardroom.

Trust them to make thank you phone calls.

The very best way to teach someone the joy of asking is to share the joy of giving. This kind of positive contact with donors will give them a strong connection with the mission and a positive fundraising experience.

Fundraising isn't about raising money. Fundraising is about building relationships. The most important relationship is between board and staff. It is time for us to start treating our senior volunteers as an asset worthy of cultivation and stewardship rather than a liability to avoid.

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COMMUNICATIONS – *Susan Sommers*

Add web site, online media room to your marketing mix

The web works best as one of a number of tools in your marketing strategy, so promote your site in everything you write: brochures, newsletters, articles, media kits, and sales kits.

Remember to set realistic goals for your website: What do you want to get out of your web marketing? Without goals, it is difficult to track results and to see what works best.

Consider the following goals: generating leads, increasing donations and other revenue, drawing sign-ups for newsletters or other materials, registering for special events, building your database, and getting feedback.

Visual elements of a great website

Know how to use graphics and typeface. Optimize graphic file size for web display and use a typeface that is Internet-friendly, such as Arial. Increase your credibility by using high-quality graphics that complement the text.

Make it easy to read by using black text on a white background if possible. If you use a background, stick with the lighter shades and keep the text black. Include captions with any photos you run.

Don't move popular pages on your site. Make sure that downloads are easily accessed in pdf format.

Copy for a great website

Headlines are key. People rarely read web copy word for word. They usually scan the pages. With this in mind, you need to provide good headlines, text the readers can scan easily, key words, bulleted lists, subheadings, and one idea in each paragraph.

Develop original, credible content. Original content is the most important trait of a great website. A site that has simple, informative writing stands out and will be revisited. Make it relevant to your target markets.

Make sure you proofread all of the copy on your website. Typos look unprofessional and diminish your credibility.

Give away something of value. Provide advice, and humour and people will flock to your site. Share information. On my website, visitors can download articles on marketing and media. As a result, I generate leads, get feedback, and build a database for my e-newsletter.

Update the site on a regular basis. Stale websites don't encourage readers to return. Keep information current, valuable, and changing.

Be interactive. Good websites engage the user by means such as inviting questions, providing quizzes and promoting contests. Provide a forum for visitors to share information with others. This is a great way for you to find out what people need.

Fill a niche. Your goal is to become the site that is known for a specific subject area. Do some research on the Internet, understand your target markets, and fill your site with information that will be important to them.

Recommend other sites Visitors like hypertext links that link them to more information or different information. Make sure that the sites to which you link are credible and professional.

Start a newsletter. Include upcoming events, articles, guest columns, questions and answers, and other websites of interest.

Suggestions for content

You might want to highlight the people in your organization by including their feature articles and speeches, backgrounders on key staff or events, testimonials (and real people for media to interview), profiles on key executives and staff, demographics of constituents, a photo library including head shots of key staff, and archived webcasts from live events, speeches and conferences.

To feature your organization's work, you could consider a description of its community involvement, position papers and statements, upcoming projects and events, and key messages. More basic information would include the organization's history, a fact sheet and annual reports going back two to three years.

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About Susan Sommers

Susan Sommers founded her own public relations firm, susan sommers + associates, in 1982. Since then, she has created marketing and media relations programs for hundreds of nonprofit organizations across Canada. She has designed and delivered Key-To-The-Sector Workshops in marketing and media, and teaches marketing and media relations courses through Continuing Studies, University of Toronto. She is also a popular keynote speaker and workshop facilitator for nonprofit conferences and workshops.

Sommers' latest book, Building Media Relationships, Second Edition (Oxford University Press, 2008) is available through our Book Room at www.canadianfundraiser.com/buildingmediarelationships

Visit her website at www.susansommers.ca or e-mail her at susan@susansommers.ca

COMPENSATION

Fundraising salaries decrease across North America in 2008

Salaries for charitable fundraisers in the United States and Canada decreased in 2008, according to the latest *Compensation and Benefits Study* from the **Association of Fundraising Professionals**.

Average salaries for Canadian fundraisers decreased from $74,376 in 2007 to $71,511 in 2008, a 3.9% decrease. The average salary for U.S. respondents decreased by 2.0% from US$72,683 in 2007 to US$71,199 in 2008.

The survey found that location and type of organization played an important part in determining salary. Within the three regions of Canada, average salaries for all respondents ranged from $60,017 in the Atlantic provinces to $75,862 in the central provinces.

Fundraisers working for trade and professional associations enjoyed the highest average salary of $100,000, followed by those individuals employed by scientific or research organizations ($95,400) and educational organizations ($80,878).

The possession of a certification credential correlated positively with salary. Individuals in Canada holding the Certified Fundraising Executive credential earned $19,366 more than those who did not. Those individuals possessing the Advanced Certified Fundraising Executive credential earned $26,703 more in Canada.

As expected, there were also positive correlations between average compensation and the size of an organization's staff, its budget and amount of funds raised, as well as years of professional experience.

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Media room serves as complete, current reference

COMMUNICATIONS from page 10

Create an online media room

One of the fastest growing media tools is the online media room or news room. A media room icon on the home page directs the media to a specific place on your site designed for their needs. A well-designed, carefully edited media room eliminates paper clutter and enables the media to select the information they need. Also, it provides security from viruses in attachments (many media outlets have a policy not to open attachments due to viruses).

A successful online media room must be visually exciting and filled with current information. By providing media-friendly materials on demand 24 hours a day, you increase the chances for someone to write about you, using photos you have supplied and information that is accurate.

Why do the media visit a media room?

They may be looking for ideas for stories or segments. Perhaps they have heard about your organization and want to obtain more information. They may need a quote and are looking for a credible resource in your industry.

The media often visit a media room to get background information and confirm the credibility of a company they have heard about. They may be planning to contact you and want to verify information.

Online media kits eliminate paper clutter, provide up-to-date information on breaking news stories and offer security. Many editors will not open unsolicited mailed media kits.

Components of an online media room

Many of the components included elsewhere in your website will be useful in the media room as well. Additional features may include the ability to search your media room by date, topic, keyword, type of file (current or archive); contact information for your spokespeople, and a complete media kit that is easy to download.

Other helpful items include current and archived media releases, feature story ideas, past media coverage of the organization, 10 to 20 sample interview questions for talk shows and articles, links to pertinent studies, statistics, and news stories, an e-mail alert service for new media releases and information, links for further research and related articles, and a request for information form.

Things to remember

Be sure to include the specific names and contact numbers of PR staff to give the media quick access to the company or organization. Make sure your media room is accessible from the main site. Use phone calls, faxes, and e-mail to drive traffic to your media room and to keep media posted about information and crisis updates.

It's important to provide solid information (not advertising copy) to help the media to write their stories. Give them the chance to offer feedback and get more information. Use a hit counter to measure the effectiveness of your media room.

To find examples of online media rooms, look up "Press Room;" "News Room" or "Media Room" on the Internet.

BOOKS – *Leanne Hitchcock*

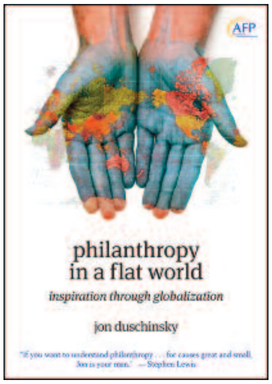
Philanthropy in a Flat World: Inspiration through Globalization, by Jon Duschinsky

Today's technical advances have made it possible to do business, or almost anything else, instantaneously with billions of other people across the planet – but what does that mean for your nonprofit organization, whether it's new or established? In today's borderless world, your nonprofit must become more flexible, adaptable and international in approach to help it survive the coming challenges.

Philanthropy in a Flat World: Inspiration Through Globalization is a compellingly practical handbook for your nonprofit on what a flat world means for you and, more importantly, for your donors, as well as on how you can become equipped to deal with this new global society. It engages fundraisers in an open, honest, and challenging look at the forces at work in creating the global philanthropic world of tomorrow.

Author and internationally renowned fundraising consultant **Jon Duschinsky** helps you chart your own course in today's world of instant information transfer and of media power and concentration. You'll be able to mobilize capital for good, compete with the media, corporations and retailers, and react to and grow with the opportunities presented by the flat philanthropic world.

Building on some of the premises presented in **Thomas Friedman**'s book *The World is Flat*, this book challenges a number of taboos, helps us understand the concepts at play in a flat world and how these trends will impact fundraising around the world. As the author urges, if we keep an open mind and remember how much the world has changed in the past ten years we could very well believe that everything we know about tomorrow is likely wrong.



Duchinsky talks about the impact of societal trends, human trends and political trends on fundraising and nonprofits and what we need to do to become successful in light of these changes. Find out why you need to know about the global philanthropy crisis, how to survive and thrive, the four-step plan to flat philanthropic success, and balancing out the future fundraising mix.

The author will speak at **AFP** *Greater Toronto Chapter*'s *Fundraising Day 2009* on "Quantum Fundraising," described as "your Red Bull for this new, globalized philanthropic world."

To order your copy of Philanthropy in a Flat World for just $33.95, visit www.canadianfundraiser.com/Bookroom/productDescription.asp?Book_ID=135

About the Author

Jon Duschinsky is the Founder and Director of Be The Change Consulting. He was founding member of the fundraising group Cascaid in the U.K. before becoming an established fundraiser in France.

He is a recognized speaker at high-profile international events and faculty member at universities in Europe and the U.S., where he delivers training on inspiration, motivation and creativity in fundraising practice and theory.

Despite slump, careers in fundraising look promising

COMPENSATION from page 11

Never-ending gender gap

A significant gap continued to exist between the salaries of male and female fundraisers. Male fundraisers in Canada reported an average salary of $85,343 in 2008 while women earned $67,711 on average.

Asked whether they had looked for a job with another employer in the last 12 months, 40% of Canadian respondents said yes. Top reasons for job leaving included a higher salary, frustration with the work environment, more interesting or challenging work, and opportunities for career advancement elsewhere.

AFP president and CEO **Paulette V. Maehara** noted that despite the economy, fundraising remains one of the strongest professions with many opportunities for both beginning and experienced practitioners. "*U.S. News and World Reports* identified fundraising recently as one of the top 30 professions for the future," she says. "Fundraising knowledge and know-how is still in huge demand, especially in a challenging economy when giving is at a premium."

The survey also addressed health, retirement and other benefits.

For more information, http://www.afpnet.org/ka/ka-3.cfm?content_item_id=24903&folder_id=2326

IDEAS WE'VE NOTED – *Janet Gadeski*

Pseudo-philanthropy tarnishes our sector – but not the perpetrators

Janet Gadeski, Editor

You can't read this newsletter or any major metropolitan daily for a month without coming across an article about another charity having its registration revoked for disguising tax shelter schemes as philanthropic activities. Given its own scarce resources (40 auditors for 83,000 registered charities according to **Kevin Donovan** writing in the *Toronto Star* on April 25), the **Canada Revenue Agency** investigates, audits and catches a remarkable number of these frauds.

Every revocation makes headlines, generally because the difference between tax receipts issued on the one hand, and verifiable assets transformed into meaningful change to human lives on the other, is truly audacious. It often seems that the swindlers involved in such scams are counting on the regulatory agents to be as dim-witted as the so-called "donors" are greedy. Fortunately, that's not the case.

And when the headlines appear, we in the charitable sector hang our heads and act as though the mud has stuck to all of us.

We humbly agree that charities must be more "accountable." We must divert money from feeding, healing, creating beauty and rescuing children at risk to create financial systems and PR machines that stand up to any enquiry, at any time, by anyone, no matter how uninvolved they may be in our work. We must create common standards, in part because they would somehow reassure "the public." And we must never, ever, make mistakes or take risks.

Paper cuts and fines

In the meantime, what happens to the perpetuators of the multi-million-dollar tax fraud disguised as charity? Their paperwork is taken away.

The fate of the "donors" is a little harsher – it may involve audits of previous tax returns, interest levies, and penalties.

Can you think of any other sector where the consequences of dishonesty on a nine-figure scale are so pathetically limp? I can't. We might as well just make these cheats stand in a corner for ten minutes and then turn them loose to start another fake charity. Since their previous one is shut down without a breath of criminality wafting over the individuals involved, it's not that hard for them to try it again.

The investment fraud no-one punishes

Investment fraud is often a part of that pseudo-charitable mix. Yet no investment regulator ever attacks financial advisors and service companies when they're involved in the game. In the case of the **Banyan Tree Foundation**, for example, the defrauded donors themselves had to launch a class action suit to attempt to recover their lost funds from **Promittere Capital Group Inc.**, **Promittere Asset Management Ltd.** and **Rochester Financial Limited** (***Canadian Fundraiser***, April 30, 2008).

> *"... somehow, no-one questions the trustworthiness of the financial sector when such schemes are exposed, only the veracity of the charitable sector."*

Yes, greed rather than philanthropy drove their participation in the first place. But investors whose imprudent, "too good to be true" choices don't require tax receipts to make them work can count on securities commissions to go after the schemers. Why is it different when the liars wear the costume of a charity?

You'd think some folks in the financial sector might want to see such individuals punished in order to maintain the integrity of the financial services industry. But no ... somehow, no-one questions the trustworthiness of the financial sector when such schemes are exposed, only the veracity of the charitable sector.

It's beyond the mandate of the CRA to bring criminal charges against such swindlers. Securities regulators, financial professionals' organizations and the police don't seem to care. That combination of powerlessness and indifference usually keeps the names of the guilty out of the papers and off the lists of convicted criminals.

There's only one story angle left: suspicion of the integrity and competence of charities. Is it media coverage alone that places the charitable sector, rather than individual fraudsters, their companies and greedy so-called "donors" under inspection?

Or is the silent acquiescence of the charitable sector playing a significant role in allowing that disproportionate scrutiny to continue?

PROFESSIONAL GROWTH

Technology, trends and measuring your success

AFP Edmonton & Area Chapter, *Ketchum Canada Update on Current Trends in Philanthropy*, **Stu Reid**, Senior VP, Ketchum Canada. Thursday, June 4, 11:30 a.m. - 1 p.m., Edmonton Petroleum Club. Members $25, non-members $30.

http://www.afpedmonton.ca/PDFs/06-04-09_luncheon.pdf

Evaluating Your Development Program - How Do You Measure Up? **Linda Lysakowski**, President & CEO, Capital Venture. Wednesday, June 10, 10:45 a.m. - 1:15 p.m., Canadian Western Bank Tower, Edmonton; locations TBA in Grande Prairie, Fort McMurray. Audioconference. Members free, non-members $20.

Edmonton - http://www.afpedmonton.ca/PDFs/06-10-09_audio.pdf; Grande Prairie, Joanne Ballance, JBallance@gprc.ab.ca ; Fort McMurray, Melane Leblanc, melane.leblanc@keyano.ca

Making the Most of E-mail Marketing, **Allison Van Diest**, Senior Product Marketing Manager, Blackbaud. Thursday, June 25, 1 - 3 p.m., Canadian Western Bank Tower, Edmonton; locations TBA in Grande Prairie, Fort McMurray. Audioconference. Members free, non-members $20.

Edmonton - http://www.afpedmonton.ca/PDFs/06-25-09_audio.pdf; Grande Prairie, Joanne Ballance, JBallance@gprc.ab.ca ; Fort McMurray, Melane Leblanc, melane.leblanc@keyano.ca

AFP Ottawa Chapter, *Evaluating Your Development Program - How Do You Measure Up?* **Linda Lysakowski**, President & CEO, Capital Venture. Wednesday, June 10, 12:45 - 2:30 p.m., Laframboise Hall, St. Paul University, Ottawa. Audioconference. Members $10, non-members $20.

http://guest.cvent.com/EVENTS/Info/Invitation.aspx?e=3df8da33-c4cd-4491-887d-b353d2e36212

AFP Vancouver Chapter, *Leading the Board from Behind*, **Colleen Kelly**, Executive Director, Volunteer Vancouver. Thursday, June 4, 7 - 9 a.m., Century Plaza Hotel, Vancouver. Members $30, non-members $45 in advance, $35/$50 at door, plus GST.

www.afpvancouver.org

AFP/APRA Summit, *Organizational and Skill Evolution for Changing Times*. Tuesday, July 28, 8:30 a.m. - 5 p.m., Boston Mariott Copley Hotel, Boston, MA. Members US$450, non-members US$550.

http://www.aprahome.org/Education/22ndAnnualInternationalConference/AFPAPRASummit/tabid/831/Default.aspx

CanadaHelps, *MyCharityConnects*. 8:00 a.m. Monday, June 8 – 4:30 p.m.Tuesday, June 9, MaRS Discovery District, Toronto. Easy, cost-effective ways for charities and non-profits to build capacity through online technology. Ontario charities and nonprofits $250 +GST (subsidized by Ontario Trillium Foundation), charities and nonprofits outside Ontario, $375 +GST.

http://mycharityconnects.org/conference

Idealware, *Getting Started with Online Donations*. Thursday, June 11, 1:00 - 2:30 p.m. EDT. Webinar. US$40.

Considering Social Media for Your Organization. Wednesday, June 17, 1:00 - 2:30 p.m. EDT. Webinar. US$40.

Optimizing Your Website for Search Engines. Thursday, June 18, 1:00 - 2:30 p.m. EDT. Webinar. US$40.

http://www.idealware.org/online_seminars/

IN BRIEF

Hilborn Group's Civil Sector Press becomes exclusive online marketer of unique Charity CAN service

The ground-breaking **Charity CAN** online service, the only way you can search, sort, analyze, compare and rank Canada's 80,000 registered charities (***Canadian Fundraiser***, June 15, 2008), is now widely available through Hilborn's **Civil Sector Press**.

Third Sector Publishing, publisher of the *Canadian Donor's Guide*, launched the service last year and has just named Civil Sector Press its exclusive online marketer.

Through a license agreement with the Government of Canada, Third Sector Publishing accesses and collects information from T3010 reports, which all registered charities in Canada must file annually. You can now use this unique online connection of financial data from all Canadian charities to gather the relevant analytical information you need to make informed decisions and save time.

Visit http://www.canadianfundraiser.com/Bookroom/productDescription.asp?Fromadmin=1&Book_ID=138 to learn more take a tutorial, see sample reports, register and subscribe. For more information, call Leanne Hitchcock at 416-345-9403 or email at leanne@hilborn.com.

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Send names now for Giving Hearts Award Program

IN BRIEF from page 14

AFP *Vancouver Chapter* is calling for nominations for the 3nd Annual Vancouver AFP Giving Hearts Award Program. Awards are given in three categories: outstanding philanthropist, outstanding youth in philanthropy and outstanding corporation.

The deadline for submissions is June 30. Awards will be presented at the chapter's National Philanthropy Day luncheon on November 10.

To download the Giving Hearts Awards Information Sheet and Nomination Form, visit www.afpvancouver.org

Children's Emergency Foundation uncharitable

The **Canada Revenue Agency** has revoked the charitable registration of **The Children's Emergency Foundation**, a Toronto-area charity, effective May 9, 2009.

An audit revealed that "the Charity has devoted a significant portion of its resources to the promotion of two tax shelter donation arrangements, an international donation arrangement and has devoted a substantial portion of its actual cash donations to fundraising and administrative expenses," according to a letter sent to the charity in March.

The foundation reported receiving cash and non-cash gifts in excess of $57.8 million, but could not substantiate the values represented, whether it ever actually received the property, whether the property was distributed or even if the property actually existed. Of a further $11.1 million in tax-receipted cash donations, the charity directed $7.9 million to fundraising and administrative fees, while devoting only $3.2 million to its own charitable activities.

For more information http://www.cra-arc.gc.ca/nwsrm/rlss/2009/m05/nr090511-eng.html

Ted Garrard leaves University of Western Ontario for SickKids Foundation

Ted Garrard (***Canadian Fundraiser***, October 15, 2008) has been appointed president of Toronto's **SickKids Foundation**, effective July 6. He will leave the external VP role at the **University of Western Ontario**, a position he has held since 1996.

Garrard was the 1997 recipient of the Outstanding Fundraising Executive Award from the **National Society of Fundraising Executives** *Toronto Chapter*. He was named the following year as one of Canada's Top 40 under 40 and recognized by the **United Way/Centraide Canada** for outstanding volunteer service.

A committed volunteer, his current directorships include **Imagine Canada** (Chair, 2004-2007), **United Way/Centraide Canada**, **United Way International**, **211 Canada** Steering Committee and Director **Ketchum Canada** (National Advisory Board).

For more information, Carol Duncan, Director of Public Affairs, 416-813-8518, carol.duncan@sickkidsfoundation.com

Gifts of securities to Salvation Army drop 83%

For the year ended March 31, 2009, **The Salvation Army** saw a $5.8 million (83%) drop in securities-related giving. While dollars raised declined from nearly $7 million in 2007 to $1.2 million in 2008, the number of planned securities gifts also declined precipitously from 289 to 142 – a 51% drop.

Regular cash donations have seen a slight rise, but this increase has been offset by the significant decline in gifts of securities due to the decline in the markets. Meanwhile, demand for the organization's services continues to increase by 10-30% in every province.

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