CANADIAN FUNDRAISING & PHILANTHROPY*

INFORMED ANALYSIS AND BEST PRACTICES FOR THE CANADIAN NONPROFIT SECTOR

GOVERNANCE – *Janet Gadeski*

Tell them, train them, teach them – you'll have a better board

The big players in the charitable sector are only slightly better than small charities at making their board members successful, according to a study of board effectiveness just completed in Canada. That's good news, for it means board effectiveness is more about intention and follow-through than size or money.

But even the winners fall short of excellence. The 700 respondents told the survey that "ongoing board training, complete and thorough board manuals, clear job descriptions that outline the role and responsibilities of board members, coupled with formal board orientation separate good organizations from bad and help explain the difference between effective and ineffective not-for-profit boards." Yet only two-thirds of nonprofits orient new board members and a meagre 25% continue board training beyond orientation.

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Innovative Research Group conducted the study, a joint project of ***Canadian Fundraising & Philanthropy*** and **Altruvest**. *Assessing Not-For-Profit Boards – Governance Structures & Practices in Canada* provides benchmarks for governance structures and practices and identifies characteristics of board effectiveness in "good" nonprofit organizations.

Hospitals and large charities (fundraising revenues over $5 million in 2008) score highest on the performance factors. Those qualities include a commitment to orientation and ongoing training, a complete board manual, a high retention rate and directors' and officers' liability insurance. Education and micro charities (fundraising revenues under $100,000 in 2008) rank the lowest – but the difference between the scores was only 7%.

"If Mama ain't happy, ain't nobody happy"

Medium-sized charities (fundraising revenues between $1 million and $5 million in 2008) are least likely to report a satisfactory relationship between their boards and their CEOs or executive directors. In general, CEOs seem to rate the relationship somewhat lower than their boards do. Staff leaders' discontent is also reflected in the responses of both senior and junior staff. Here too, board orientation makes a difference. Organizations that have a manual and an orientation program are more likely to report a satisfactory board-CEO relationship. Orientation, a board manual and training also have a positive effect on CEOs' perceptions of their boards, on the board members themselves feeling adequately supported and on directors' satisfaction with board conduct and procedure.

Financial strain may ease slightly

The survey included a brief check-in on the impact of economic conditions on 2009 contributions. Overall, the outlook is slightly more positive now than it was in ***CF&P***'s January 2009 economic study. Fifty-seven per cent of respondents predicted in January that their charity's revenues would either stay the same or increase. That number has risen to 66%.

However, among the pessimists, the attitude has become less hopeful, with 8% expecting contributions to "decrease greatly" in July, compared to just 3% in January.

Better boards, better fundraising, greater success

Board competence and fundraising credibility go hand in hand. With fundraising revenues surpassing $20 billion annually, and a growing call both within the sector and among the general public for some consistent, meaningful way of measuring impact, it is the most qualified and competent boards that will best be able to manage those questions.

That same competence will benefit their own organizations as boards learn to work together better, serving the organization's vision through sound strategy and long-term guidance. It is very good news, then, that if nonprofits invest in complete board manuals, orientation programs and training, they will greatly boost the effectiveness of their boards.

As a Premium Leadership Service subscriber, you will receive a copy of the study at no charge as one of your subscriber benefits.

ETHICS – *Kimberley MacKenzie*

How to break up with your donors

The **Lake Simcoe Conservation Foundation** has been very good to me. I have been very good for Lake Simcoe. I have learned a lot. So have they. Together we achieved many great milestones and even won a couple of awards. With mixed feelings I know that now is the right time to move on.

So when the opportunity came to work with **Ontario Nature** as its Director of Development, it seemed a natural and exciting progression: the right move at the right time.

There was just a little problem: "my" donors. I really like them. All of them. We chat in person and on the phone. I've been to their houses, shared wine at their cottage, met their grandchildren. They write me notes with their donations. I write them notes with their tax receipts.

Some of "my" donors are even helping "me" find other donors. One even stymied me by asking a prospect for $50,000 at a cultivation breakfast meeting – and got it! Another is passionate about helping to get more monthly donors, and with a little support is bringing in hundreds of new dollars a month.

The Poppins paradigm for farewell management

When you become so close to your donors and know it is your time to leave, what happens with the relationship? Should you make plans to stay in touch? Give them your new coordinates?

The simple answer is NO. Absolutely not. This is not "your" relationship. Our job is to build a relationship between the donor and the organization. We are the middleman. We are Mary Poppins.

Mary Poppins swoops into the Banks family at just the right time. She is friendly and yet firm, providing structure, love, warmth and humour. When the winds change she graciously makes her exit. The Banks family is stronger for her having been there and moves onto their next thing – kite flying. Donors give because they love the cause, not because they love you.

I recently tweeted that I was writing break-up letters to donors and a couple of people asked me how on earth I would write something like that. So instead of just sharing my opinion (worth what you paid for it!) I will share with you what worked for me this week.

Next week our newsletter is going out to all constituents with a letter from our president announcing the move and wishing me well. So at the end of this week I personally wrote to individuals who are the most involved, are giving at the highest level or have made multi-year pledges.

Each letter was different but had the same core structure. Here is one example.

Dear Bill,

Tell them why you are writing

It is with very mixed feelings that I'm writing to inform you that I'm leaving the Lake Simcoe Conservation Foundation. I've been presented with a great opportunity that I must take advantage of.

I have accepted a position with Ontario Nature as their Director of Development. As a result my last day in the office will be September 4, 2009.

Tell them to keep donating

Bill, your enthusiasm and support of this foundation is so very much appreciated. I do hope that it continues. For Lake Simcoe, there simply isn't another environmental organization doing the kind of work this Foundation and the Lake Simcoe Region Conservation Authority are. Your donations and involvement are very important.

Reassure them the organization is still solid

Because of people like you, we have been able to do incredibly well building the Foundation and exponentially increasing funding for programs delivered by the Lake Simcoe Region Conservation Authority. The Foundation has solid leadership in place and excellent staff (copied above) to carry on much of the work.

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About Kimberly MacKenzie

Kimberley MacKenzie was executive director of the **Lake Simcoe Conservation Foundation** from 2005 to 2009. She led the organization to an average 34% growth in revenue per year for three years and more than quadrupled the amount of funding available for programs. In 2008 LSCF was named Outstanding Small Organization for Excellence in Fundraising by the Toronto chapter of **AFP**.

Kimberley specializes in quickly building fundraising programs from scratch, motivating volunteers, and change management. She is now director of development at **Ontario Nature** and honorary head of fundraising for the **Showcase of Innovation and Inspiration** http://sofii.org.

Visit her blog at www.kimberleymackenzie.blogspot.com or contact her at kimberley.running@hotmail.com.

SHORT & SMART

Seven elements of a powerful fundraising offer

When you write a fundraising letter you aren't offering anything tangible, says **Jeff Brooks** of **Merkle Inc.** That means your case has to be pretty powerful. The best fundraising letters, he advises, contain all of these seven elements:

A problem

Something in this world needs to be fixed. Something great can happen if we take action. Help donors see the problem as real, believable and threatening. Portray the problem vividly. Describe it as the crisis that it is.

A solution

The solution has to be simple and obvious. Maintain the connection to the problem and not its sociological root-cause analysis. Even if your mission is about strengthening civil society, in the donor's mind the solution to hunger is food, not empowerment. Empowerment eliminates hunger because it results in food. When fundraising, focus on the food.

Cost

Connect the problem, the solution and the donor's pocketbook. Give concrete cost examples. Segment your donor database so that you ask for the right amounts based on previous history. And emphasize how low the cost of your solution is – donors want bang for their buck.

Urgency

Give the donor consequential reasons not to delay: a meaningful deadline after which an opportunity will be lost or a problem will get worse, a holiday season to respond on time, or negative consequences of failure to act, especially in life-or-death matters.

Context

Remember that your donors aren't specialists in your mission. Avoid professional jargon. Use colloquial language, ordinary examples and everyday expressions. You're not writing most of your appeals for your staff program workers.

Donor benefits

Remind donors that their gift makes the world a better place and allows you to continue your mission. Remind them of personal benefits too – fulfilling the injunctions of their faith, making them feel good and creating a tax deduction.

Emotion

Connect with your donors at the heart level or you won't get the gift. Decisions are made with the emotions and then justified by the mind. Think about what you'd do if you saw a toddler heading straight for a busy street. Then think about reading a white paper on childhood injuries and traffic fatalities. Which would move you to stronger, faster action?

A call to action that contains all these elements will have your donors reaching for their pens and chequebooks.

Read the full article at http://www.fundraisingsuccessmag.com/article/elements-great-fundraising-offer-411586_1.html. Contact Jeff Brooks at jbrooks@merkleinc.com.

Breaking up is both end and beginning

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Remind them of their specific work or action

(This is also good for staff so the letter can be filed and the action items for this individual can be highlighted. It really helps with moves management.)

I'm sorry I didn't get a chance to work with you more on building relationships at Sunny Bay. Of course you are well positioned with Marie on one side and Justin on the other. Your great work will no doubt continue.

Be sincere and say goodbye

I am deeply grateful for the opportunities afforded to me as the executive director, and in particular your willingness to open your home and ask people to support this work too. I will remember the people and my time here with great fondness.

Most Sincerely,
Kimberley
Kimberley MacKenzie
Executive Director
Lake Simcoe Conservation Foundation

Yes, it is a little bit sad. Changes are bittersweet. A really cool thing happens though – your donors write you back. They thank you for your work and wish you well.

I remember feeling sad for Mary Poppins when she watched from the window as the Banks family went off kite flying. Yet we knew that wasn't the end of the story, but rather the beginning of the next one.

There are new relationships waiting for me at Ontario Nature and I very much look forward to each one of them. For the next couple of weeks I'll just enjoy the pause in between.

TECHNOLOGY- *Heather Burton*

Buy a solution, not just software

With certain purchases, many of us want more than just the product. We want a total customer experience with a total solution. How we are treated as a customer makes a huge difference.

Each of us values different things. For some, it's the whiz-bang features. For others, it's tried and true dependability. I'm in the tried and true boat – which is probably why I've driven my Honda Civic for almost 10 years!

The theory of wanting more than just the product goes for software, too. No one wants to merely acquire a computer program. You ultimately need a complete solution that will address your organizational needs. Your staff must be able to use the program effectively, and your organization should be supported technically if your needs change, new programs or campaigns are added to your funding plan, or if you have questions or issues about using your software.

Before you begin to evaluate actual fundraising packages, spend some time thinking about the factors that facilitate a successful conversion to new software. After all, software selection is only part of the conversion process.

Support, please!

Virtually all software users require some support services, be they technical support, upgrades, training or implementation assistance. However, your experience will differ with each vendor depending on the company's longevity and main focus of its business (e.g. technology leader, operational excellence, or customer experience). It's important to match your organization's needs to the vendor's ability to deliver in the following areas:

- **Technical support**: Technical support provides answers and support to users by telephone, e-mail or Web. Consider how comfortable your staff is with troubleshooting software issues and the responsiveness of your IT departments or consultants. Keep in mind that even a sophisticated employee might need help with a new system or new features and functionality. And, if fundraising is your organizational lifeblood, you will want a safety net to ensure your software is up-and-running any time you need it.
- **Maintenance updates:** Maintenance updates, usually consisting of software upgrades and enhancements, are intended to keep your software working well. They help extend the life of your software solution, maintaining compatibility after network, hardware and operating system upgrades. Additionally, updates can also include security or compliance functionality, protecting your organization from potential data breaches.
- **Training:** To realize more immediate value out of your software, staff must be adequately trained to use it. The more sophisticated the fundraising solution, the more training that may be required for staff to become comfortable and proficient. Be sure to find out the various training options. Will your staff members have to travel to training, or are classes offered locally? How often is training offered? Is online training available? Make sure the training options and costs fit with your staff's needs and budget.

Beware the training trap!

If you plan on training only one staff member, give it a second thought. Even the most dedicated person may leave an organization or fall sick during a critical campaign. If only one staff member is the primary user of the fundraising package, consider training at least one additional person to ensure that you don't lose the ability to use the system. Too many organizations forgo the short-term investment, resulting in long-term deficiencies.

Successful implementation: a critical component

All fundraising software needs some degree of configuration to reflect your existing programs and processes. You set

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About Heather Burton

Heather Burton is a senior marketing manager for **Sage North America**'s *Nonprofit Solutions.* She holds a BS in electrical engineering from the **University of Maine** and prior to joining Sage worked in the semiconductor industry. During that time, she began her community involvement and worked on her company's charitable giving team, which provided the opportunity for her career change to a full-time fundraiser.

Just before joining Sage in 2005, Heather worked in several development roles and as a loan executive for **United Way**. She also led volunteer fundraising teams for a local hospice. Because of her technical expertise, Heather continually finds herself consulting on everything from software selection and implementation to website development practices.

Contact Heather at 512-454-5004 x6221 or heather.burton@sage.com

VOLUNTEER MANAGEMENT – *John Webster Hochstadt*

Creating meaning and challenge for your volunteers

It's not always easy to create genuine engagement with work for staff members. When the workers are unpaid and seldom present (at least compared to staff people), the task of motivating and satisfying them is even greater. In a presentation at Calgary's *Vitalize* conference in June, **Cheryl Humphrey** of **Cheryl Humphrey Consulting** described a process called "Integrating Human Resources" (IHR) to identify the work functions that need to be accomplished in organizations and involve people in performing them.

She applies current thinking on changing demographic trends to develop an organizational culture that supports IHR and the strategies that best use the skills and talents of paid and unpaid people.

Rethinking, in this view of engaging volunteers, is not about finding something for people to do. It's about creating meaning in volunteer work that connects people to the mission and purpose of the organization.

What do volunteers want?

Increasing, volunteers are outcome-oriented and want to make a difference – to contribute to changing their communities and our world. They want a compelling mission, an opportunity to use their skills and experience to create meaning and purpose.

Humphrey says, "These are the capacity builders." She encourages managers to create time-specific volunteer opportunities, custom designed roles with increasing authority and scope that will take advantage of the significant skills and knowledge available in the most enthusiastic volunteers.

She acknowledges that many nonprofits face a lack of time for planning, a dearth of new board members, a shortage of volunteers and financial instability. Even so, she says, nonprofit leaders can build their organizations' capacity by matching volunteers' idealistic passions with carefully designed roles meeting the needs of the new recruits.

A good question for potential volunteers is "What do you love to do?" Key questions for nonprofit managers are "What projects are sitting on the shelf?" and "Can they be broken down?" If they connect, there are great possibilities for all parties.

Additional resources can be found at www.volunteeralberta.ca. For more information from the presenter, contact Cheryl Humphrey, cheryl.humphrey@shaw.ca

Careful installation plan saves later grief

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up the software to match the way your organization labels and tracks constituents, records and tags gifts, reports information, determines campaign success and performs many other tasks. The more detailed and varied your programs and the more intricate the solution, the more set-up time required.

- **Initial setup**: Think about how you want your new data formatted, and what criteria are vital to your fundraising success. Make sure you capture the right information at the necessary level of detail so you can produce the variety of reports you need. Before installation, consider the detail you require. It's easier to import it the way you want it the first time than to change it later.

- **Converting existing data**: Once you purchase new software, the first step in moving toward the upgrade is preparing and transferring existing records to the new software program. How will you get your current data in the new system and in the proper format? Find out if there are tools available for the prospective software. Evaluate any related integration development needs, turnaround times, formatting, or follow-up support costs well before the conversion process has begun so you have an accurate expectation for the scope of the project. Software vendors may perform this service for a fee. If your vendor doesn't, the software manufacturer may have partnerships with consultants in your area – ask them for more information.

- **Interfaces**: Plan to test your new system's interfaces with other applications that you and other departments use on a regular basis, such as accounting, Microsoft Office applications, online donation processing applications, and even printers.

Think of the software purchase and the installation and conversion processes as a whole. Software list price is just one component to the total cost of conversion. By focusing only on buying the lowest-priced software, you may incur additional costs (e.g, to supplement or work around missing or incomplete functionality, for extra consulting, or training) to achieve the same benefits as a system with a higher list price. Similarly, avoid paying extra for functionality or services that have no value to your organization.

Next time I'll discuss the role of consultants in software evaluation and the first steps in budgeting for your purchase. Let the evaluation continue!

FITTING IN – *Douglas Flanders*

The sniff test – determining an organization's culture

Organizational culture can influence an employee's happiness in the workplace more than anything else. Also known as organizational values, organizational culture explains the goals of an organization and the behaviour that people adopt to achieve those goals. Important as a group's personality is, cultural behaviour is one of the most difficult things for anyone outside the organization to determine.

When I was teaching fundraising at **Ryerson University**, students often raised questions about organizational culture, particularly when undertaking a job search. I advised students to give any organization the "sniff test" – an informal approach based on intuition, common sense and background legwork. A culture is often difficult to express but one can sense it or sniff it out. Usually, the clues about culture are there but you have to look for them

Make haste slowly. All of us have moved too quickly in accepting a job without doing due diligence first. Take as much time as you can to get a feel for the work place and the people with whom you could be working.

Interview offers big clues

Sensing an organization's culture should be a key goal of any job interview. Arrive early for an interview, stop before you go in, and collect your thoughts. As you enter the door, be in touch with the workplace's "feel" or "climate." What are your first impressions? Are the offices well-cared for and inviting? Are they tidy or cluttered? Are there comfortable chairs on which you (and donors!) may sit? Is there reading material related to the organization? Does the interior decoration reflect the cause? When you wait for the interview to begin, what is your gut sense of the atmosphere? If appropriate, try to engage with staff.

For one job interview, I was kept waiting in a cluttered, dingy outer office that overlooked a cluttered, dingy inner office. There was no receptionist but the mail clerk kept coming and going. He welcomed me and, knowing that I was there for an interview, he wished me well. As an aside he also said, "Don't mind Mrs. Smith (the executive director). Her bark is worse than her bite." It was a telling clue that, along with what I had already seen, helped me decide not to accept the position.

As they treat one another, so they'll treat you

Are people in the office civil? Are they polite and do they speak with friendliness if not warmth? How does the receptionist respond to you? Is he/she open, friendly, supportive, kind? When I came early for my first interview in one of the best organizations I worked for, I quickly saw that staff members were friendly and treated each other with cheerful respect. Someone offered to get the receptionist a coffee. The receptionist herself was genuinely friendly, offered me refreshment and provided gentle encouragement for the interview to come.

In contrast, one of the most challenging places I worked had no receptionist or waiting area. I was ignored until I was summoned to the interview room. Someone who bustled in to search for a file looked right through me and did not acknowledge me, an obvious stranger. The person turned out to be the head of fund development for the organization and as it turned out, the attitude emanating from the top trickled right on down the staff chain!

The interviewers were cool, distant and somewhat self-absorbed. Although formally polite, there was a distinct lack of graciousness. I was offered the position but negotiating the contract was like a game of cat and mouse. All the signs were there but I chose not to heed them.

Within two weeks of starting the job, it was obvious that the organization paid scant attention to the human side of things, and that there was no desire to help people work well together. Staff – particularly those in senior positions – took no responsibility for their individual behaviour and had absolutely no insight into its impact. Leaving that organization for another was one of the more satisfying career moves I ever made!

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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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TAXATION PROPOSALS

C.D. Howe Institute joins call for broader tax relief

Charitable giving in Canada could increase by as much as $700 million per year with more favourable tax legislation according to the **C.D. Howe Institute**. In its e-brief released mid-September, *Unlocking More Wealth: How to Improve Federal Tax Policy for Canadian Charities*, author and charitable gift specialist **Malcolm Burrows** advocates eliminating capital gains taxation on gifts of real estate and private company shares.

The paper offers convincing evidence for the recommendations that charitable sector leaders, including Burrows, first proposed to **Stephen Harper** in an open letter on January 5 of this year (***CF&P*** January 15).

Gifts of real estate

Proceeds from the sale of real estate, Burrows asserts, could be contributed entirely or in part to a charity. The donated portion could offset taxable capital gains just as gifts of appreciated securities do now. Allowing the donor to sell the property and donate the cash, an option not available to donors of securities, frees the charity from the risk of fluctuating valuations and the work of selling or managing the property.

A donation of actual real estate rather than sale proceeds should also be eligible for capital gains tax relief, Burrow says, as long as the property is related to the charity's mission. The property could become another kind of ten-year gift, with the receipt value requiring an independent appraisal.

Gifts of private company shares

Burrows (and others in the sector) call for the equal treatment of gifts of securities, whether they are of publicly traded or private companies. The charity would have to dispose of the shares within 60 months at a price supported by an independent valuation in order to issue a receipt. The donor would recognize the gift at the time the securities are sold.

Projected gifts well worth tax revenue foregone

Since 1995 when gifts of ecologically sensitive land began to receive favourable tax treatment, donors have contributed property worth $494 million, according to **Environment Canada** statistics cited in the Howe e-brief. Generalizing that experience to gifts of all types of real estate, Burrows predicts new gifts of $100 million to $200 million annually, compared to foregone federal and provincial tax between $65 million and $115 million.

Gifts of private company shares, he says, could be even more significant – between $200 million and $500 million a year, with governments losing out on $130 million to $325 million in tax revenue.

Download the full report at www.cdhowe.org.

Matching the look, the talk and the walk

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What are people wearing in the office? If you are a suit and tie person, would you be comfortable in an environment that supports jeans and tank tops? And vice versa?

If you have a chance to meet with staff, what is the shoptalk? What do they brag about? How do they talk about donors?

Do your due diligence. Can you ask discreet and confidential questions of anyone you know who works with the organization or has worked there previously? One organization offered me a tempting position. I had reservations, however, and could not put my finger on the reasons. Research uncovered a former staff member whom I had known years earlier. A phone call and a private conversation provided the insight I needed as to why I should have reservations both about that organization and about the person to whom I would be reporting. I did not take the job.

Let instincts guide your thoughts

Follow your instinct. Follow your gut. If you have reservations, ask yourself why. Talk it through with someone close to you. Make a list of the pros and cons of the place. Think, think and think. What is it that is holding you back? Sometimes you may have to say no to a position because you cannot say an unqualified yes. Your instinct on these things will seldom be wrong as long as you give yourself time to think things through.

Ask about the organization's culture in the job interview. Has there been a high staff turnover? If employees tend to stay a long time, ask why. Ask the interviewers to describe the work place culture as they see it. Ask them to describe staff morale. Watch the interviewers carefully to read the signs. You may not get an honest answer to your questions but your interviewer may provide clues through body language.

Even after due diligence, we can still make mistakes. Remember, though, we all have choices and we usually have options. Cultures are difficult to change and doing so usually involves much more than one staff person can influence. We spend too much time in the workplace to endure an environment that is not a match. Learn from your experience, cut your losses and move on.

I recommend the sniff test. It usually works. Take your time, use your head, and be open to the clues about an organization's culture that are invariably there.

CAREER DEVELOPMENT

What's in your professional backpack?

A couple of years ago, **Michelle LaBrosse**, "Chief Cheetah and Founder" of **Cheetah Learning**, was featured on CNN pouring out the contents of her backpack. The story described how she ran her business virtually from wherever she was with the trusty items carried on her back.

Of course her backpack held her laptop, iPhone, digital camera and chargers. There were also some creature comforts: her MP3 player, a book, a sweater, healthy snacks, water and noise cancelling headphones.

After the story aired on CNN, she began thinking about what was in her backpack that was intangible. What were all the unseen things that really helped her build her business? Here's her list of items that matter most in her backpack, because they're just as valuable for building a successful nonprofit.

> ***"Tie your passion into a way to serve others, and you have a home run."***

Passion

LaBrosse is an engineer and a certified project manager. She's passionate about the power of project management. She gets excited every time she uses her project management skills to solve a problem or complete a project. It doesn't matter what you're passionate about, she says, but it does matter that you carry the magic of your own passion with you wherever you go.

Think like an engineer

You may have heard about the lazy engineer. LaBrosse says engineers don't look at the word "lazy" like everyone else. To them, it means finding a smarter and faster way to do something that may not take as much energy or resources. In this context, lazy is a good thing. Think of the person in your office who spends all of his or her time looking very busy but accomplishing little. When you think like an engineer, you are always looking for better and more efficient ways to do things.

Mastery

In *Outliers*, **Malcolm Gladwell** proposes that it takes 10,000 hours to truly master anything. When LaBrosse read that, it resonated with her because she's spent her entire career focusing on mastering project management. She carries over 10,000 hours of experience in her backpack. That number is inspiring, she says, because it shows that if you invest the time and passion in anything, you can master it.

Focus

With information coming at us from all directions, LaBrosse acknowledges it's not always easy to focus. Whenever she feels overwhelmed by a project or a goal, she takes the time to break it down and focus on what she has to do to get the job done. Project plans are invaluable: the calm within the chaos and the perfect way to get everyone and everything centred and back on track.

Persistence

There are millions of ideas buzzing around. Many of them never see the light of day. LaBrosse believes that the ones that do evolve from idea to reality are driven by people who follow through with persistence and aren't happy until they see the successful completion of a goal.

Humble humour

You can't beat the combination of humility and humour, says LaBrosse. It's very powerful for your team to see the boss make a mistake, admit it, laugh about it and move on. "The air is thinner at the top of the mountain," she reminds us. "That's why we all need to tumble down now and again to gain some perspective."

Service

Martin Luther King, Jr. said, "Everyone can be great, because everyone can serve." Service to others has been a cornerstone of LaBrosse's own personal and professional success. Serving allowed her to learn about herself and to receive more than she gave. She finds that service and passion make a great combination. "Tie your passion into a way to serve others, and you have a home run."

Now you might be thinking, "Nice backpack you got there, but where do I begin?" Start by thinking about the successes you've had so far, small and large. To what do you attribute them? How can you build on them? What can you do to take yourself to the next level? How can you move your skills to a level of mastery?

For more information about Michelle LaBrosse, contact her at marketing@cheetahlearning.com, download her podcasts at http://podcast.cheetahlearning.com/podcastgen/ or visit www.cheetahlearning.com.

BURSARIES AVAILABLE

Toronto Congress support for small agency fundraisers

Quick thinkers and writers still have time to apply for a bursary to attend **AFP Greater Toronto Chapter**'s *Congress 2009*, three days of intensive education and stimulating discussion that will provide you with new techniques to tackle the challenges and opportunities you and your organization face.

"We're keenly aware that this is a pivotal year for most us," says Congress chair **Mark Hierlihy**. "The current economic challenges have placed increased pressure and demands on many organizations, especially on those with smaller budgets and more limited resources."

That's why the chapter is offering bursaries to foster the professional development of individuals who work in agencies raising $1,000,000 or less per year.

Made possible through the support of the **AFP Foundation for Philanthropy – Canada** and the **RBC Foundation**, the bursaries are designed to benefit committed fundraisers eager to learn best practices from the world's most respected fundraisers, network with colleagues from across Canada, and develop key professional skills. Some of the bursaries will include airfare and/or hotel as well as registration costs. The deadline for applications is **October 7**.

The congress, which bills itself as "a world-class gathering for fundraisers," is set for November 30 to December 2 at the Metro Toronto Convention Centre in downtown Toronto. **Matt Flannery**, co-founder and CEO of **Kiva** will open the first plenary session.

Workshop topics include board governance, campaigns, direct response fundraising, donor cultivation, leadership, major and planned gifts, marketing and communications, organizational development, special events, sponsorship, corporate giving and social media.

Please visit http://afptoronto.org/index.php/congress/rbc-bursary-program for complete details.

TWITTER

Tweet to remember Alzheimer's and perhaps raise money

A philanthropist with four grandparents affected by Alzheimer's disease has launched a digital memorial effort through **Twitter**, according to the social media blog **GivingRoom.com**. *A Million Tweets to Remember* (*1Mtweets*) asks people to tweet about loved ones who lived or are living with the disease at http://1mtweets.com/. The campaign coincides with the launch of *World Alzheimer's Day*, a global initiative to raise awareness about Alzheimer's.

Jordan Banks, the philanthropist behind the effort, has devoted countless hours over the past decade to raising money and awareness for Alzheimer's research and care. "This time around," he says, "I really wanted to leverage technology in garnering substantial support around the world."

Banks knows his way around the Internet and the world of social media. He helped launch **eBay Canada** in 2000 and was most recently the CEO of **Jump TV**, a broadcaster of sports and international television over the Internet. A quick check of references to the 1Mtweets initiative found the story on **Facebook** and a number of sites tracking developments in entertainment, pop culture and the Web.

Using Twitter effectively for causes

1MTweets seeks to prove there is a prominent place for worthy causes within social networks, and that – if engaged in the right way – people will actively network and connect to support and promote causes close to their heart, Giving Room says.

"Twitter is a powerful platform," adds Banks. "The transfer and sharing of information and level of engagement on Twitter is incredible, making it a great resource to raise awareness for Alzheimer's and memorialize those who have lived with the devastating disease."

Though awareness-raising is the primary goal, tweeters can opt-in to donate a minimum of $1 per tweet. All proceeds from will be allocated to research projects focused on the aging brain and Alzheimer's disease through the **Alzheimer Society of Canada** in collaboration with the **American Alzheimer's Association**.

For more information, www.givingroom.com, http://1mtweets.com.

MARKETING – *Susan Sommers*

Networking to win friends for your organization

I have been attending networking events since 1982 – both to promote the organizations I have worked for and to promote my own business. Over the years, the role of networking and my attitudes towards it have changed. More than ever before, people do not want to receive junk faxes, e-mails or direct mail pieces. That makes face-to-face communication a very important tool in promoting your organization's programs, services, and events.

I believe that networking, along with speaking and writing, is one of the best tools for building a database for any organization. For nonprofits, it is important to "think outside the box" about marketing. Networking events give you the chance to find new clients, sponsors, donors, volunteers and staff. Women's networking groups, chamber of commerce and board of trade meetings, and other associations provide those opportunities. And, if you are the only nonprofit organization in a room filled with for-profits, that is a bonus.

Networking is a skill to be learned. Many people feel uncomfortable starting conversations with strangers. Here are some guidelines to help you to find, understand, and enjoy networking events.

Where to find networking opportunities

Look at calendars of events in your newspaper or on your local cable station for upcoming networking events that you could attend.

Contact an association in your sector for information on upcoming meetings and events. Meeting other people in your sector can lead to partnerships, referrals, and friendships.

At conferences, look for the networking opportunities on the agenda. These often occur between sessions, before lunch or dinner, or at the end of the conference.

Trade and consumer shows provide many networking opportunities, including talking to exhibitors, having lunch with other attendees, and visiting the hospitality suites of exhibitors.

Find out about associations within your community, such as business associations (boards of trade and chambers of commerce) and social service associations (Rotary and Kiwanis). Volunteer to be on a committee and get to know the people involved in the association.

Ask people who attend or work at your church or synagogue for suggestions for networking to promote your organization. Don't forget your children's schools, sports groups, and other social activities.

Tell friends and colleagues to let you know about networking events.

Types of networking events

Formal introductions Each person in the room stands up to introduce himself/herself and to say something about their organization or business. This is an excellent format, since you find out something about all of the attendees. After the introductions, you have the chance to choose some of these people to talk to.

Informal introductions You walk around, introduce yourself, talk, and exchange business cards. This is less intimidating but you will not get to know as many people.

Association luncheons, dinners, and breakfast seminars Networking often occurs before or after a speaker. Arrive early or arrange to stay later to take advantage of these opportunities.

Get directions, find out the dress code and arrive early. It is easier to talk to several people at the beginning of the event before the room fills up.

Ten rules for networking

Create and deliver your 20-word description (your elevator speech). Use it to introduce yourself and your organization at networking events. Here's the format: "_______________ (your organization) is a _______________ (type of organization) that offers ______________ (programs and services)___________________ to ________ (constituents)."

Get out of your cocoon and start talking! The benefits far outweigh the discomfort!

Set goals for yourself. Be realistic about

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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

IDEAS WE'VE NOTED – *Janet Gadeski*

Index of Wellbeing can't help but reflect nonprofits' social impact

Janet Gadeski, Editor

Economists **Joseph Stiglitz** and **Amartya Sen**, both Nobel prizewinners, are calling for a new definition of national wellbeing. Gross Domestic Product, they say, doesn't cut it as a total measure of living standards.

Writing in *The Toronto Star* on September 13, Stiglitz notes "Moreover, the focus on GDP creates conflicts: political leaders are told to maximize it, but citizens also demand that attention be paid to enhancing security, reducing air, water and noise pollution, and so forth – all of which might lower GDP growth."

Star reporter **Martin Regg Cohn**, in his analysis two days later, says, "GDP ignores environmental degradation, but counts the hospitalization costs of people poisoned by pollution as a positive."

Broader examination under way in Canada

Stiglitz and Sen's ideas resonate with former Saskatchewan premier **Roy Romanow**. He's pulled together an advisory board of national and international experts to guide the **Institute of Wellbeing**. It's already produced some national reports as part of its *Canadian Index of Wellbeing*. Their approach echoes the *Vital Signs* initiative of Canadian community foundations.

Like GDP, the Index of Wellbeing reflects our standard of living. But unlike GDP, it includes not just economic achievement, but our health, the quality of our environment, our education and skill levels, the way we use our time, the vitality of our communities, our participation in the democratic process and the state of our arts, culture and recreation. In future, the Institute will provide a composite index that moves up or down like the TSX to reflect changes in Canadians' quality of life.

Though its proponents haven't yet articulated this idea, the Index just may be the first national measurement that truly reflects the significant impact of Canada's nonprofit sector. And it dovetails beautifully with a green shoot of language change that sees a few progressive, even assertive "nonprofits" referring to themselves as "community benefit organizations," rather than as what they are not.

Wrongly measured, wrongly done

There's a potential revolution here. Stiglitz rightly points out that we live in a performance-oriented world where measurement is increasing in importance. What we measure affects what we do. If we measure the wrong thing, we'll do the wrong thing.

For example, GDP may lead to the false choice between economic growth and environmental degradation. A better measure, he says, might show that steps that improve the environment are also good for the economy. A better measure than GDP would attach less value to the country with the world's highest expenditure on health care (the U.S.), and more to its population's actual health and life expectancy, which are substantially below those of many other nations.

A new perspective on charity evaluation?

The Index of Wellbeing integrates economic output and community wellbeing. So do Stiglitz and Sen. French president **Nicolas Sarkozy** is so taken with their vision that he's bringing it to the next G20 meeting.

As debate continues in the charitable sector over the definition and the measures of effectiveness, it's worth keeping an eye on their efforts. On the one hand, we see a growing call for the application of quantitative, business-based measurements to charities. On the other, a few significant

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Networking: less work than you think

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the number of people you can meet for a meaningful conversation. In a two- or three-hour session, try to connect with three to six people.

Trade information. The more you give, the more you get.

Play host. Take the time to introduce people you feel could benefit from meeting one another.

Talk first, eat later.

Approach a loner. It's easier to start a conversation with a person standing alone than it is to break into a group.

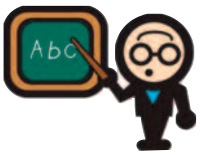
Exchange business cards (and write on the back what you say you will do).

Follow up with your leads. The day of (or the day after) a networking event, e-mail the three people you met to tell them that you would like to keep in touch or get together.

Build ongoing relationships. In the end, networking is a wonderful way to generate funds, find sponsors, meet colleagues, and build strategic alliances.

PROFESSIONAL GROWTH

Learning opportunities for fundraisers and other leaders



Key-To-The Sector Workshops/ Webinars, *Get Sponsorship Savvy for your Event*, Wednesday, October 28, 9 a.m. - noon. EDT; *Event Marketing/Media Magic*, Wednesday, October 28, 1- 4 p.m. EDT; both led by **Hala Bissada** of Hala Events & Communications Inc. Osgoode Professional Development Centre OR delivered to your desk by Webinar. Early bird, $147 +GST by October 7; $274 +GST for both.

http://www.canadianfundraiser.com/workshop_Agenda_viewer.asp?workshop_ID=345

> ***Key-To-The Sector Workshops*** *are accredited by CFRE International for certification or recertification. A 25% discount is available for subscribers to Canadian Fundraising & Philanthropy's Premium Leadership Service.*
>
> *Mary Singleton, Workshop Manager, 416-267-1287; more information, presenter bios, and registration, www.canadianfundraiser.com/webpages/keyworkshops.asp*

AFP Greater Toronto Chapter, *Why Should I Choose You?* **Sandy MacKenzie**, Inspire; **Ian Chamandy** and **Ken Aber**, Blueprint Business Architecture. Tuesday, October 6, 8 – 11:30 a.m., Alumni Hall, University of Toronto. Includes breakfast buffet. *Here Comes 2010. Are You Ready?* **Tracey Bailey**, Ketchum Canada. Tuesday, October 6, noon – 1:30 p.m., Alumni Hall, University of Toronto. Luncheon presentation. Members workshop + lunch, $60, workshop only, $50, luncheon only $30; non-members $80/$60/$40.

http://www.gifttool.com/registrar/ShowEventDetails?ID=1128&EID=5570

How Great Teams Turn Conflict Into Strength, **Diana Smith**, Partner, The Monitor Group. Thursday, October 8, 12:50 - 2:30 p.m., Oakham House, Ryerson University, Toronto; Needles Hall, University of Waterloo. Webconference. Members $20, non-members $25.

www.afptoronto.org

AFP Vancouver Chapter, *Planned Giving in the Chinese Community*, **Kari Leoganda, Nancy Fong, Ellen Wong**. Wednesday, October 7, 11:30 a.m. - 2 p.m., Sun Sui Wah Restaurant, Vancouver. Includes dim sum lunch. In advance, members $40, non-members $55; at door, $45/$65; GST will be added.

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

CAGP Alberta North Round Table, *The Art and Science of Gift Planning*, **Brian Shea**. Wednesday, October 14, 9 a.m. - noon, Grant MacEwan College, Edmonton. RSVP by October 8. Members $25, non-members $30.

wendy.loar@cancerboard.ab.ca

CAGP Greater Toronto Area RoundTable, *Endowments – Bird in the Hand or Two in the Bush*, **Michelle Osborne**, Director Gift Planning, University of Toronto Advancement. Thursday, October 15, 8 – 9:30 a.m., Ted Rogers School of Management. Register by October 9. Members $35, non-members $45.

www.regonline.com/CAGPTorontoOctober152009

Carters Professional Corporation, *Church and the Law Seminar*. Tuesday, November 10, 8:30 a.m. - 3:30 p.m., Young-Nak Korean Presbyterian Church of Toronto. Early bird $25 by November 2.

1-877-942-0001 x230, Fax 519-942-0300, seminars@carters.ca, www.carters.ca

Imagine Canada, *Low-cost Ways to Protect Your People & Reputation*. Friday, October 9. Insurance Bootcamp: Cover Your Assets & Protect Your People. Wednesday, October 14. Both webinars 1 – 2 p.m. EDT. Fee varies.

https://www.imaginecanada.ca/civicrm/event/register?id=1&reset=1

Maytree, *Creating an Automatic Marketing Culture*, **Donnie Claudino**, Marketing Manager, TechSoup Canada. Thursday, October 22, noon – 2 p.m., St. Michael's College, Toronto. Includes a light lunch. Free.

www.maytree.com

Measures that track "the right stuff"

IDEAS WE'VE NOTED from page 11

members of the academic and political establishments are calling for a much broader vision of what to assess.

Their ideas are fertile ground for a renewed look at the accomplishments of our community benefit sector – both as we are and as we can be when the right things are measured in a meaningful way.

For more information, The Canadian Institute of Wellbeing, www.ciw.ca.
Contact Janet Gadeski at jgadeski@gmail.com; follow her on Twitter at http://twitter.com/CFPed

IN BRIEF

33% of charities world-wide raising more money

Despite a tough economy, 33 per cent of the 126 participants in the *Global Fundraising Confidence Survey* completed in August report raising more money in the previous 12 months than they had the year before. However, half of the participating organizations report a drop in income. Charities in Asia are the hardest hit, with an average decline of 13 per cent. European charities are experiencing the least change, an average drop of just one per cent.

Those with a drop or no change in their fundraising results are reluctant to blame the economy alone. A slim majority (54 percent) also name additional causes such as difficulty recruiting good fundraisers, poor board leadership during the economic crisis and a lack of effective strategy for dealing with the crisis.

Confidence is growing among fundraisers around the world, with 56 per cent telling the survey they feel more confident about donations in the coming 12 months.

For more information, visit www.managementcentre.co.uk.

CRA cracks down on abusive charity tax shelters

Another charity with a close financial relationship to **Canadian Humanitarian Trust** has failed to pass muster with **Canada Revenue Agency**'s eagle-eyed auditors. CRA pulled the registration of the Edmonton-area **Alberta Distribution Relief Agency Aid Society International** on September 14.

Alberta Distribution Relief functioned almost entirely as a tax-receipting conduit for funds received through CHT, CRA says. Between 2004 and 2006 it issued receipts for more than $106 million, kept just 1% of the amount for its own activities, and passed the remaining amounts through to another charity. From there, the funds found their way back to the promoter of the tax shelter arrangement.

For more information, http://www.cra-arc.gc.ca/nwsrm/rlss/2009/m09/nr090914-eng.html.

Survey tracks interest in nonprofit jobs

Retired people and workers aged 45 and over are the subject of a survey that tests their interest in switching to late-career or post-retirement nonprofit staff roles. The **HR Council for the Voluntary & Non-profit Sector** will share their findings with nonprofit organizations and people working on labour force strategies in the nonprofit sector.

According to HR Council project manager **Maureen Kellerman**, the survey reflects the nonprofit sector's growing interest in individuals with experience from other sectors. It wraps up in late October. The Council plans to make the results available towards the end of the year.

For more information, www.hrcouncil.ca.

Help for small and rural charities from *The Charities File: On Board*

With funding from **Canada Revenue Agency**, *The Charities File: On Board* offers a web site and training series to help board members of small and rural charities.

Its Web resources include The Treasurer's Chest (tools and templates for treasurers, bookkeepers, and finance committees), The Fundraiser's Receipt Book (information, tips, and the latest CRA fundraising guidelines), Agenda Gems (a year-round calendar of seasonal agenda items for boards and annual meetings) and The Shoe Box (lists and rationale for storing and transferring key organizational documents).

The training sessions are offered around the country via webinars, tele-learning and in-person workshops.

The Charities File: On Board is a joint project of the **Centre for Voluntary Sector Research and Development at Carleton University**, the **Community Services Council Newfoundland and Labrador**, the **Calgary Chamber of Voluntary Organizations**, and the **Voluntary Organizations Consortium of B.C.**

For more information or to register, www.thecharitiesfile.ca.

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