

# On Target

AFP OTTAWA CHAPTER Winter 2010-2011

## IN THIS ISSUE

1. Best Practices in our Community
2. Member Spotlight
2. Ask Leah
2. Upcoming Educational Sessions and Events
3. How AFP Ottawa Serves You
4. Demandez à Leah
5. News Briefs



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## Best Practices in our Community: Achieving Diversity in Fundraising

By Kim Strydonck, CFRE

with Daniel Clapin, ACFRE; Dawn Cooper; and Boyd McBride, CFRE

**I**n fundraising, as in other matters, diversity is all around us.

Demographic differences can influence the types of relationships donors might have with your charity, but it can be difficult to grasp the nuances of these differences and to manage them. AFP Ottawa recently caught up with three local fundraisers who were more than willing to weigh in and provide advice about how to tread the waters of diversity.

- Boyd McBride heads up SOS Children's Villages Canada. Having initiated practices to cultivate donors who have come from a variety of countries, he is sensitive to the need to vary one's fundraising approach.

- Daniel Clapin works at Saint Paul University. Having the support of alumni who are recent graduates as well as those who studied at the University many years ago, he is well placed to consider if there are differences in donor expectations and fundraising practice based on age.

- Dawn Cooper is the Manager of the Ottawa Unit of the Canadian Cancer Society. Previous experience includes United Way of Peel Region as well as several hospital foundations, both in rural and urban communities.

### Which fundraising rules are constant?

The bottom line comes down to the importance of finding out your donor prospects' current situation, and then cultivating a relationship with them that is respectful and service-driven.

Boyd explains, "I think our whole business around Link-Interest-Ability [the three pillars of prospect research based on their current or past association with your charity; their level of interest in your cause or project; and their financial ability to give at various levels] is still very much in play. I think the other basic tenet is that whether they're new Canadians or a few generations in, they want to know what they're funding and how they can make a difference. That's no different than any of us would feel."

Daniel chimes in, "There might be differences in how we approach them and the vehicles through which they give at different ages but all people respond to good service, or donor-centered service which in reality is a client-centered approach." His thoughts seem to echo those of Dawn, "All donors expect appreciation as well as honesty, accountability and confidentiality, regardless of where they live."

### How should you vary your approach based on demographic differences?

Boyd captures the essence of how to know when to vary your approach with this advice: "Just be ready for the fact that you need to start where they are."

"With regard to donors who have come from other countries," Boyd continues, "it really depends on where they're from and for how long they've been in Canada. Let's consider people from countries experiencing corruption or where philanthropy isn't well rooted. In those cases, we better be ready to think about exchange relationships such as events, raffles, a chance to rub shoulders with someone, or some other way that they get something back. It might be a token transaction but it can help. Many people will continue only giving that way. Others will become donors on a more philanthropic level. It would be unreasonable to expect them to immediately embrace volunteerism and giving. Of course, there's a segment within our own community which gives the same way."

Donors who live in rural areas also tend to have particular expectations and, as Dawn explains, it's essential to carefully consider how to approach them. "My experience suggests that the main difference between rural donors and urban donors is rural donors often have a more intimate connection with the causes in their community. The community is made up of people they know and love – family members, long-term friends and neighbours. They're protective of each other and a mistake made with one affects many."

Continued on page 3

## Upcoming Educational Sessions and Events

**Wednesday  
January 19, 2011**

*Breakfast for Success*  
Holistic Approach  
To Life Balance

**Wednesday  
February 16, 2011**

*Breakfast for Success*  
Networking: Interpreting  
Body Language

**Wednesday  
March 23, 2011**

*Breakfast for Success*  
Social Media: Is it all it's  
cracked up to be?

**Wednesday  
April 13, 2011**

*Breakfast for Success*  
Planned Giving  
Presented in partnership with the Canadian  
Association of Gift Planners (CAGP)

### Location:

Breakfast for Success -  
Hampton Inn Ottawa  
Conference Centre.

Visit [www.afpottawa.ca](http://www.afpottawa.ca)  
and watch your email  
in-box for more info!

Stay tuned also for  
featured mid-day audio  
conferences!

Session details subject to change

### Member Spotlight:

## Ruth Catana

Chief Operating Officer, Nature Canada

by Kelly Ducharme

### What do you see as the connection between your role as Chief Operating Officer and fundraising?

I've had a number of different roles and responsibilities during my tenure at Nature Canada. In my current role as Chief Operating Officer, I've come to realize the importance of achieving success through the integration of fundraising, communications and marketing functions of an organization. Nature Canada is unique and has been able to capitalize on these synergies. Integration facilitates the development of organizational messaging, ideas and team work. Nature Canada's strategy has been to develop a number of revenue streams to support our conservation work and mission. We implement fundraising strategies including annual giving, major gifts, legacy giving, corporate and foundations, and sponsorships.



Ruth Catana

### Why is your AFP membership valuable to you?

I have been a member of the AFP since 1992. I have seen our sector grow and the AFP has facilitated this growth by providing resources and educational opportunities to its members. I support our code of ethics and communicate its importance, not only internally but also to our board of directors and donors. I believe that our profession will only grow if we share our knowledge and experience. I am proud that, throughout my career, I've always believed that you empower people by sharing and supporting them.

**What makes working for an environmental cause interesting?** I've been with Nature Canada for almost sixteen years. Canadians give less to the environment (2%) than any other sector within the non-profit community. This in itself is challenging. The interesting part of this challenge is that we continue to develop approaches, both from a programming and fundraising perspective, to achieve sustainable growth.

### What advice do you have for those new to the non-profit sector?

I would encourage anyone interested in our sector to further their education and learn the technical components of fundraising. I would also recommend that new fundraisers learn more about other functions within their organization, such as communications, volunteer management and governance. You need to be passionate about your organization and success will follow.

### **AFP Ottawa Mentorship Program: A value-added membership benefit**

Have you ever wondered how much further you could take your career and your charity if only you were given the right opportunity? Well, wonder no more. Instead, sign up to participate in the AFP Ottawa Mentorship Program!

- A solution to those facing development decisions or needing more information about specific aspects of fundraising.
- Benefit from a seasoned professional with whom you can discuss ideas and gain feedback.
- Receive support, a strong network of professionals and friendships that may extend beyond the program's term.

For further information  
please visit the Mentorship section of the AFP Ottawa website  
or email Bronwen Dearlove

# Thanks to You

**The 2010  
Philanthropy  
Awards was a big  
success!  
Thank you to  
everyone who  
attended!**

**PRESENTED BY:**



AFP Ottawa is grateful to all who submitted nominations, gave sponsorships, and who came out to celebrate with us.

Congratulations to the 2010 award recipients:

**Algonquin College Event  
Management Students  
and Faculty**

**bitHeads**

**Roger Greenberg**

**Maplesoft Group**

**Tereza Top**

**Ryan Williams**

Mark your calendar to join us in November 2011 for the 17th annual Ottawa Philanthropy Awards!

## Best Practices in our Community (Continued from page 1)

And what of age differences? "A younger generation may expect you to be far more efficient and expedient," suggests Daniel. "If you send me an email you expect me to respond quite quickly. Likewise there's an expectation for a fast income tax receipt and acknowledgement. I made a gift; I want to know that you received it and processed it. Older donors tend to be more forgiving. They want efficiency but in the end, if they know they're helping people and it's a cause they hold dear, they'll often give more leeway."

### How can you take the next step in embracing diversity among donors?

#### Ethnic diversity or country of origin:

• "If you're serious about tapping into a particular community you better engage the leadership of that community," Boyd advises, "You need someone to help you interpret the culture, offer cautionary advice and introduce you to the right people. Otherwise you could easily make big mistakes. You can't know all the nuances. If you don't have access to the leadership who can make introductions, at least engage someone who can offer advice and cautions."

• "It's pretty important, for long term success, to have someone of the same culture (perhaps a board member or a volunteer) approach the donor. It's about having a peer to peer approach."

#### Diversity based on age:

• Daniel's advice again reminds us to be conscious and respectful of 'where your donor is.' "The younger person might not be able to give as much as someone who has had time to accumulate wealth, but it might be a lot for them. You might have a policy to call donors who give \$100 or more. But if you have donors who are younger you might want to reduce that and call if they give \$50 or even \$35 or more. I really believe if you're good to your donor, once they have the ability to give more they'll recall how you treated them in the early days."

• "I think the younger donor is often looking to get involved and they want to be invited in, perhaps more so than many older donors. If we don't pay attention to that relationship, the donor will look at you in their rear view mirror as we fade from their memory. We call that a lapsed donor. They call it "I don't know who you are."

**Continued on page 6**

## "Ask Leah"

By Leah Eustace, CFRE



Leah Eustace, CFRE  
President, AFP Ottawa

**I know how many people my charity serves each year, but how can my charity measure its deeper social impact to know if it's really making a difference?**

More and more, charities are being held accountable not just for how donor dollars are used, but also for the social impact of their work. For example, your charity may have provided emergency shelter for 10 families, but what impact did having that shelter have on those families? To measure social impact (often referred to a SROI, or social return on investment) you need to go beyond numbers to answer the question, "so what?"

Fortunately, there are some excellent resources to help you determine your social impact – something I can't show you how do in a few hundred words! Here are some I recommend:

- London Business School's SROI primer
- The Skoll Foundation's Social Edge Program
- MaRS gives a Canadian perspective
- The Center for Social Innovation at Stanford University

This is a constantly evolving field, so be sure to use current resources as references. Also, keep an eye on the news feeds: there are currently a number of standard measurement tools being developed, with IRIS, GIIRS, and PULSE leading the way.

**Please send your fundraising questions to [jothurlbeck@rogers.com](mailto:jothurlbeck@rogers.com), with the subject line "Ask Leah." LIRE CET ARTICLE EN FRANÇAIS À LA PAGE 4.**

# HAPPY HOLIDAYS

From  
AFP Ottawa

We wish you a  
joyous, safe  
and prosperous  
season and look  
forward to seeing  
you in 2011!



## Save the date

Spring is just  
around the corner  
and, with it,  
AFP Ottawa  
Fundraising Day!

May 3, 2011

### How AFP Ottawa Serves You:

## A Word from Your Chair of Advancement

By Paul Chesser, CFRE with Chelsea Dunn

When I was offered the chance to join the Board of AFP Ottawa as Chair of the Advancement Committee in 2009, I jumped at the chance! As the Chief Development Officer at Carleton University, I discuss the benefits of contributing to continuing education every day. Volunteering on the Advancement Committee, I encourage and assist AFP Ottawa members to further their career by gaining fundraising credentials and pursuing new learning opportunities. It's a natural fit.



Paul Chesser, CFRE

AFP Ottawa strives to be your trusted resource for information and to provide valuable networking opportunities. The Advancement committee is really about taking this ongoing education to the next level.

If you want to move ahead in your career, attend major conferences and gain new credentials, the Advancement Committee is here for you. For example, we host a CFRE Study Buddies program. We also provide bursaries for educational opportunities, including the Chamberlain Scholarship which allows one local fundraiser each year to attend the AFP International Conference. Congratulations to Carole Gagné Ince of Christie Lake Kids on winning the Scholarship to attend the 2011 Conference!

Remember what award-winning author Louis L'amour said: "no one can get an education, for of necessity education is a continuing process."

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## « Demandez à Leah »

Par Leah Eustace, CFRE et Benoit Brunet



Leah Eustace, CFRE  
Présidente, l'AFP d'Ottawa

**Je sais combien de personnes bénéficient des services de mon organisme de bienfaisance chaque année, cependant comment puis-je mesurer plus fondamentalement l'impact social généré afin de savoir si nous faisons réellement une différence?**

De plus en plus, les organismes de bienfaisance sont tenus responsables non seulement de la façon dont les dons recueillis sont dépensés, mais également sur l'impact social de leur travail. Par exemple, votre organisme aurait pu aider dix familles à trouver un hébergement d'urgence, mais quelle est vraiment l'incidence réelle de cet abri sur ces familles? Pour mesurer votre impact social (souvent appelé RIS ou retour d'investissement social), vous devez aller au-delà des statistiques et répondre à la question : « Et alors? »

Heureusement, plusieurs excellentes ressources peuvent vous aider à déterminer votre impact social – ce que moi je ne peux faire en seulement quelques centaines de mots! Voici celles que je recommande le plus :

- Notions élémentaires sur le rendement social préparées par la London Business School
- Programme Social Edge de la Fondation Skoll

Suite à la page 6

## AFP is 50 !!!!!

This year we've been reminding you of all that AFP International has to offer you. As this birthday year comes to a close, here's a quick review...

- Resource Centre
- Advancing Philanthropy magazine
- Audio-conferences
- International Conference
- Legislative Updates and Action Alerts
- Directory of Consultants and Resource Partner Pages
- AFP Membership Directory
- Member Discounts
- Compensation & Benefits Study
- AFP International also supports local chapters so that you can take advantage of educational and networking opportunities in your community.
- And more!



## News Briefs

### LOCAL AND REGIONAL NEWS

• **CHAMBERLAIN SCHOLARSHIP HELPS LOCAL FUNDRAISER TO ATTEND AFP INTERNATIONAL CONFERENCE:** Congrats to Carole Gagné Ince of Christie Lake Kids, this year's recipient of the Chamberlain Scholarship. If you attend the Conference, you may end up meeting Carole. [Click here for conference details.](#) Applications for the 2012 Scholarship will be available by the fall of 2011.

• **OUTSTANDING FUNDRAISING EXECUTIVE:** Is there a local fundraiser who has inspired you or who you feel is deserving of recognition? Consider nominating him or her for the AFP Ottawa Outstanding Fundraising Executive Award, which will be given at Fundraising Day in May. Watch for nomination forms early in 2011!

• **NETWORKING OPPORTUNITY:** Do you enjoy meeting people, networking or doing research and analysis? Then consider volunteering with the AFP Ottawa Membership Committee! [Contact Kim Strydonck](#) to find out more.

• **EVERY MEMBER CAMPAIGN AT 96% OF GOAL – IT'S NOT TOO LATE TO DONATE:** 50 AFP Chapter Boards throughout the United States and Canada committed to this year's campaign and achieved 100% participation. AFP Ottawa is proud to stand among them, having achieved 100% Board participation early in 2010. At 96% of our \$5,000 Chapter goal, we don't have far to go, but with only a few weeks left before the end of the campaign (December 2010), we need your help. [Please, click here to donate](#) and help ensure all fundraising professionals have access to educational materials to provide the highest quality of service to their charities and donors.

### CBC STORY ON EXPENSE OF PRIVATE FUNDRAISERS

Most AFP Ottawa members have probably seen or heard about the CBC report released earlier this fall denouncing charities paying private fundraisers, and particularly pointing out telemarketing as something to watch out for. While some of the examples given in the report may indeed warrant attention, eyebrows were raised by several aspects of the report. AFP was quick to respond to the CBC. [Click here for details on AFP's response.](#)

### PUBLIC POLICY & LEGISLATION

• **CAP ON CHARITY SALARIES:** Bill C-470, which proposes a Canadian salary cap for those who work for registered charities, has passed the House of Commons and moved to the consultation phase. AFP feels that, if passed, this Bill will raise unintended negative consequences, and that the emphasis should be checks and balances on current CRA guidelines rather than the need for additional legislation. Fortunately, sector experts are having an opportunity to appear in the House to discuss the matter. [Please click here for AFP's talking points on this topic.](#)

• **AFP HAS VOICE IN FEDERAL GOVERNMENT PRE-BUDGET CONSULTATIONS:** AFP current and future members might be interested to know that, through your membership, you are being represented on Parliament Hill. That is, AFP is now invited to speak – rather than needing to offer – at Pre-budget consultations. AFP's priorities in this regard are the [proposed Stretch-Tax Credit](#) and the elimination of capital gains tax on gifts of real estate.

### CAREER ADVANCEMENT OPPORTUNITIES

• **MASTERS IN PHILANTHROPY:** In several recent editions of this newsletter we've reported about an initiative of a task force to establish a Canadian Masters degree in Philanthropy. We are pleased to report that the task force will be making an exciting announcement in the near future. Please stay tuned for exciting news.

Continued on page 6

## Parting Quote...

*Leave the beaten track behind occasionally and dive into the woods. Every time you do you will be certain to find something you have never seen before.*

Alexander Graham Bell

**AFP Ottawa  
Community Relations  
& Communications  
Committee**

Kim Strydonck, CFRE  
Benoit Brunet  
Kelly Ducharme  
Chelsea Dunn  
Leah Eustace, CFRE  
Bruce Hill, CFRE

### RESEARCH AND TRENDS

• **BUSINESS CONTRIBUTIONS TO COMMUNITIES:** Interested in learning more about how and why businesses contribute to nonprofit organizations? Click here to see the results of the Imagine Canada Business Contributions to Communities study to find the answers to these questions, and more.

• **VOLUNTEER CONTINUUM:** Active volunteers and businesses with a community dimension in their Corporate Responsibility strategy are interested in monitoring, evaluating and improving their approach to community engagement. In response, the PricewaterhouseCoopers Canada Foundation has launched a new report called the Volunteer Continuum. The report provides a tool to help individuals and businesses move from being novice philanthropists to strategic philanthropists and was developed in collaboration with some of Canada's largest charitable organizations such as Volunteer Canada, Imagine Canada and the Toronto Community Foundation. Click here to read the report.

### Best Practices in Our Community (Continued from page 3)

#### Diversity based on rural versus urban settings:

• "Get to know your donors," Dawn emphasizes. "Keep in mind that the fundraiser in a small town is a community figure, and their level of integrity is more visible than in a larger urban area. Expectations are high and stewardship is extremely important. Building and maintaining a relationship is critical, and tides could turn on good versus bad experiences."

• "Take the time to understand the dynamics of the community."

Embracing diversity is a big job when you have thousands of donors and prospects, and tight deadlines. However, if you start with the philosophy of 'being where your donor is' and then take one step at a time, you'll be well on your way to not only keeping the donors you have, but also developing the donors of tomorrow.

*Note: The remarks in this article are strictly anecdotal and should not be understood as statistical findings. There are, undoubtedly, differences in giving profiles that go beyond those discussed here.*

Interested in seeing an On Target article that features your charity? We'd like to hear about a fundraising practice that your charity successfully established. Contact us at [jothurlbeck@rogers.com](mailto:jothurlbeck@rogers.com)!

### « Demandez à Leah » (suite de la page 4)

- Perspective canadienne selon MaRS
- Centre d'innovation sociale de l'université Stanford

Comme ce domaine est en constante évolution, assurez-vous de consulter les meilleures ressources à jour à titre de références. Alors, gardez un œil sur les nouvelles perspectives dans ce domaine, car plusieurs outils de mesure standard sont en cours de développement avec IRIS, GIIRS et PULSE qui tracent la voie.

**Envoyez vos questions dites philanthropiques à [jothurlbeck@rogers.com](mailto:jothurlbeck@rogers.com). Indiquez « Demandez à Leah » dans l'objet.**