



CANADIAN FUNDRAISING & PHILANTHROPY

INFORMED ANALYSIS AND BEST PRACTICES FOR THE CANADIAN NONPROFIT SECTOR

RECESSION SUCCESS – *Janet Gadeski*

Economic recovery lags, yet Calgary area sets United Way record

As thousands of Calgary area jobs vanished throughout 2009, some employees were so anxious about their future that they didn't even notice their workplace United Way campaign was on. Three of Calgary's largest companies laid off hundreds of workers in a key week of the campaign.

Yet by year's end, the **United Way of Calgary and Area** had not only reached its goal of \$47 million, but passed it – and squeaked by the previous year's take of \$49.5 million for good measure.

Just setting the 2009 goal was challenging enough, says president **Ruth Ramsden-Wood**. The board had to balance the growing needs of agencies facing their own shortfalls with the struggles the business community faced. "Calgary was firmly in recession. The signs of recovery were not evident as soon here as in other parts of the country. Input from workplaces and the business community led us to step back on our goal. It was a tough, heavily debated decision."

Priorities changed quickly to combat recession

Throughout the year, the United Way moved quickly to address new needs, pouring extra funding into job retraining programs with waiting lists, publishing a Help in Hard Times guide for vulnerable youth and boosting service through the community 211 help line that connected people with services. Ramsden-Wood and her colleagues worked hard to maintain the profile of those accomplishments.

"Our work was visible to our donors," she recalls, "and as the campaign progressed, there were signs that some workplaces were trying to raise the same amount, even with vastly reduced staff." The same recession that led to so much job loss meant that everyone knew someone who needed or might need the kind of help that the United Way funds.

Nevertheless, the recession created difficulty with sponsorships. Many organizations, finding it hard to get attention, let alone attendance, scaled back their fundraising events. Ramsden-Wood says it was clear in the fall that people were otherwise engaged, and definitely not focused on events, going out or giving money.

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Surge of generosity at year end

Finally, in the first week of December, Calgarians began to see early signs of an economic turnaround in their city. "After that," explains Ramsden-Wood, "we began to see new energy and momentum. Engineering firms here have been decimated. Yet nine in ten of them raised as much money as last year or more, including one company that went from 1,600 workers to 600. More than 150 new workplaces ran their first campaigns. We've never seen that in any year. It's a truly inspiring response."

By the second week of December, Ramsden-Wood realized that the goal was in sight. Surpassing it by \$2.6 million, though, was something she wouldn't have predicted. "People in Calgary rose to the occasion in a stellar way," she recalls. "We were all over the moon by the end of December."

She credits the campaign success to being nimble enough to examine everything midway through the campaign and make corrections. She and her colleagues renewed the focus on the visibility of the organization's work and ramped up the attention to small business campaigns and first-time workplace participants. It paid off with more success than anyone in the organization anticipated, with a final tally of \$49.6 million. ☺

For more information, *Kate Smitko*, media relations specialist, United Way of Calgary and Area, 403-410-1835, kate.smitko@calgaryunitedway.org

TIP OF THE MONTH –*Fraser Green*

Check for purple cow before joining online herd

This column begins a monthly series contributed by members of the FLA Group.

Many if not most of the fundraisers I know are scrambling in what I call ‘technique frenzy’ again. By that I mean that we’re off chasing some magic bullet that’s just come onto the scene – hoping against hope that it will solve problems like attracting new donors, renewing old donors or convincing existing donors to give more.

Today’s technique frenzy, from what I can see, is almost all e-related. We had a client a few years ago who decisively declared, “By this time next year, I want all our donations to come in online.” This client had a robust direct mail program, which meant that three-quarters of their donors were age 65 or older. Given that the majority of this age group *doesn’t even use email*, this was a pretty unrealistic idea. Yet, he was swept up by *the latest idea*.

Today’s hot fundraising topic is social media. Charities everywhere are rushing to set up on **Facebook**, **MySpace** and to open **Twitter** accounts. There’s this hope that getting onto Facebook will bring young new donors rushing in with cash bursting from their wallets. This temptation is understandable.

As I write this, the response to the Haiti earthquake – the worst to hit the Americas in decades – is at its peak. Online donations are pouring in to agencies who are offering relief to the displaced. This response is all over the news (as it well should be).

Cows, cows – so what?

One of my favourite authors is marketing maven **Seth Godin**. I discovered Seth by reading his book *Purple Cow*. He opens the book by talking about a driving vacation he and his family took in France. As they began touring the countryside, they were all struck by the beautiful landscape and the pastures of gentle, lovely cows grazing contentedly.

Then, in his own words, “... within twenty minutes, we started ignoring the cows. The new cows were just like the old cows, and what was once amazing was now common. Worse than common. It was boring. A purple cow, though. Now that would be interesting.”

Permit me to stay with the metaphor. To the typical donor, your organization is a cow in the middle of the pasture, surrounded by a whole lot of other cows (more than 80,000 cows in fact). You may think you’re outstanding, but does the donor think so? To be really honest, my guess is no.

Let’s get back to the Haiti disaster. It’s a purple cow. It stands out. It’s being noticed – and responded to – big time. Everybody knows about the earthquake. People are going online to give and texting quick gifts on their mobile phones. E-giving to this urgent need is phenomenal – digital philanthropy at its finest.

Purple cow is the only one they’ll listen to

Now, let’s get back to you. No doubt there are people in your office clamoring to broaden your online presence – to use social media – to get with the times. All this is well and good. But, the question remains, once you’re online, what are you going to say? And more important, *will anyone listen?*

I’m fortunate to know some really great online experts – both from our sector and from outside it. They all agree that one of their clients’ biggest challenges is content. The online experts can put messages out in all the digital formats available – but the charity needs to provide compelling content! This is the challenge we’re not talking about yet. As **Seth Godin** says, in today’s world you’re either remarkable or you’re boring. I’m sure we all agree that remarkable is the preferred choice between the two.

So here’s this month’s tip: Before you spend a lot of time and money broadening your online presence, make REALLY sure that what you have to say stands out. It’s either going to be a purple cow or it’s going to be background noise that donors and prospects ignore. ☺

Purple Cow by Seth Godin (2002) is published by Penguin Group. To subscribe to Seth Godin’s blog go to www.sethgodin.com.



About Fraser Green

Fraser Green is a Principal at **FLA Group**, a consulting firm that works with clients to engage donors at a truly human level and build donor loyalty and commitment. FLA welcomes your ideas, comments and criticisms about this tip.

Please email info@fla-group.ca with your reactions and thoughts.

BOARD RECRUITMENT –*Stephen Robinson*

“Can I contribute?” A top performer assesses an invitation to board service

In my last article, *Attracting Top Talent to your Board* (CF&P, December 15, 2009), one of the points made was that top talent will assess and scrutinize an opportunity to sit on a board as diligently as they might any management position. But what criteria and issues do they look at in that assessment?

Recently I had the great pleasure of chatting with **Rem Langan**, a top performer from the marketing and communications field. He brings with him a wealth of experience from his key roles in one of the world’s most successful companies. His senior roles in marketing and communications include stints as chief marketing officer, then VP for **McDonald’s Restaurants of Canada Limited**, and as president & CEO of **Ronald McDonald House Charities (RMHC)**.

Rem is currently chairman of RMHC and is at a point in his career where he doesn’t *have* to do anything. But, like many top performers, there is still a lot he *wants* to do. He is adept at developing and implementing strategy, creative, insightful and – most important – still passionate and interested in helping great organizations.

Think First is just such an organization.

During Rem’s time working with RMHC and the organizations it supports, he met **Dr. Charles Tator**, one of North America’s foremost neurosurgeons and founder of Think First, an organization committed to creating “a future free of traumatic brain and spinal cord injuries among our children and youth.”

Rem got to know Charles as a very inspiring and gifted man with a passion for preventing the types of injuries that he so often saw on the operating table. When Charles

approached Rem to sit on the board, Rem had one very important question. “Can I contribute?”

In determining the extent to which his skill and experience could add value to the efforts of the other volunteers and staff at Think First, Rem identified three areas of consideration.

The vision, the founder

Rem found two things truly appealing: the founder of Think First, and his vision to put an end to catastrophic head and neck injury in kids’ sports. “I really look up to Dr. Tator,” Rem says. “Not only is he one of Canada’s most recognized neurosurgeons, he’s also an incredibly inspiring and deeply passionate professional who is building something of lasting value to the community.

“Charles and I sat down and he told me about his vision, and I found a place in there where my skill and experience could add real value.”

Rem saw the organization and its work with catastrophic sports-related injury in kids as an important development in the world of sports that he cherished. “With five kids and my love of sports, this was something that is very important to me.”

The time requirement

Even though his admiration for Charles and the work of Think First was important to him, Rem still felt that time was an issue he couldn’t ignore.

“If I was going to get involved,” he says, “I wanted to know I *could* get involved. Once you commit to do something, you need to be able to go to all ends to get it done.”

BOARD RECRUITMENT continues on page 4

**About Stephen Robinson**

Stephen Robinson is senior consultant responsible for the association, charity and not-for-profit portfolio at **Derhak Ireland & Partners**. Previously he was managing partner at **RFG Direct**, director, business development for **Robinson, Fraser Group Ltd.**, and general manager for a small contracting business in Alberta and British Columbia. An avid volunteer, Stephen brings a passion for the search process and the identification of highly skilled and capable leadership. He truly believes in the power, energy and vigour that good people can bring to organizations doing exceptionally important work.

Stephen is working with the team at Derhak Ireland on the development of a comprehensive board registry to serve the not-for-profit sector at the community, provincial and national levels.

For more information or to participate, please feel free to contact Stephen at Stephen@derhak.com or 416-675-7600 ext. 204.

“...he told me about his vision, and I found a place in there where my skill and experience could add real value.”

SHORT & SMART

Move your event from awareness-raising to fundraising

If you've consoled yourself one too many times with the thought that a special event "raised our profile" even when it didn't raise much money, you'll be interested in these four tips from **Event 360** to help you turn your awareness event into a fundraising event.

Craft a clear ask

Creating an effective request, says Event 360 president **Jeff Shuck**, is the most neglected part of any program. You must be able to describe in one sentence how your charity improves the world. Describe in one more sentence how the event will help achieve that goal. Then start asking "Will you help us by participating or donating?"

You'll need to turn your participants into successful fundraisers to make the event a success. Instead of asking them to raise money, though, Shuck advises asking, "Will you ask ten of your friends to donate to you?" Of course, you'll give them the training and tools to hone their asking skills. Finally, make sure your ask is specific, outcome-focused and hard to refuse.

Segment your participants

Analyze your participant base to find similarities and differences. Look for things like location, giving history, past attendance and link to the cause. Look for markers that you can use to customize messages. For instance, you'll want to communicate differently with participants who have raised nothing than with those who have received donations.

Customize communications to each segment

"In many cases," Shuck notes, "the difference between events with high attendance and events with high fundraising attendance is the frequency and the quality of the communication participants receive prior to the event."

Online tools include automatic responses to registration, thank-you messages and donation acknowledgements, each tailored to specific segments. Notices built on the event timeline can also be tailored.

You can't do it all online though. Use the phone with your more involved participants to build rapport. Engage your most experienced, effective participants as champions and mentors for other participants.

Regardless of the communication channel, the most important consideration is frequent and segmented contact.

Change your culture

If you're going to boost your event's fundraising potential, your staff, your volunteers and your participants have to affirm the goal of fundraising in their attitude, language and behaviour.

Start by measuring the right things. Set a fundraising goal rather than an attendance goal. Reward the highest fundraising team rather than the largest team.

Communicate with conviction about why you're changing the focus of an event. Help your participants understand that "participation alone does not power your organization – revenue does." Be confident about your organization's impact and how the event helps that impact. Pride and confidence, Shuck advises, are critical to real success. ☞

Download the complete white paper, *Four Tips to Turn Your Awareness Event into a Fundraising Event*, at <http://www.event360.com/assets/files/AwarenessToFundraising.pdf>.

It's a team sport being on a board



BOARD RECRUITMENT from page 3

Think First came to Rem with very clear expectations and a strategic plan. "I was able to assess what level of involvement would be required of me and felt it was quite manageable."

A member of the team

This coach, chairman and lifetime sports enthusiast believes, "It's a team sport being on a board! There is no path to success that doesn't include all of the board members supporting each other and the staff." So it was important to Rem that the rest of the team would be one that he would be able to count on as much as they would count on him.

"This board was (and is) made up of professionals who bring great expertise and who have extraordinary reputations in their respective arenas," he says, "which made it an honor even to be asked."

What gets individuals like Rem to the top of their game and keeps them there is the clear and high expectations that they have of themselves and others. Although the specifics might change from one individual to the next, the general principles are the same. When you're looking for the best, bring your best and be ready for great things to happen! ☞

PRESENTATION SKILLS – *Lisbeth Cort***Ten things you should NEVER say in a PowerPoint presentation**

I just sat through another bad PowerPoint presentation. This one by a person with over 20 years experience in branding and marketing. Huh? How does this happen?

I'd arrived that night excited, anticipating new and interesting information on a topic I cared deeply about. After all, why else would I voluntarily submit myself to another "after work meeting?"

Why, then—two minutes into the PowerPoint – did I find myself ready to chew my own arm off to get out of the trap that was the presentation hall that night?

This predicament inspired me to tap out the following tips on behalf of future audiences everywhere. We have a short attention span, a lot on our minds, and you've only got us for a few minutes. Make it count.

Let's see, oh, this frame shows...

Don't put the PowerPoint in the lead. Know your subject, use your presentation to back up what you're saying, add interest, and keep it moving.

We shouldn't feel like you're as surprised as we are by the next frame.

These statistics show...

Statistics don't "show" anything. Tell the statistics if you need to back up your point but don't put them on the screen. Give us a great related image to look at while you're gaining credibility with numbers. We are concurrently visual and auditory learners. Your PowerPoint can be concurrently brilliant and engaging.

The building doesn't exactly look like this today, there's no... and the..., but...

If your point is to show how it looks today, then take the time to shoot a picture today. Digital cameras + Google Earth + instant downloads = no excuse for not getting out there and taking a current photo. Plan ahead, get the shot, and use images (not empty words) to illustrate your point.

How do I go back?

Test the presentation in advance. Be sure you know how to use the remote or mouse. If you use audio, be sure you know how to use it. Your audience is not your human guinea pig and it's too late to call tech support when you're at the podium. Suddenly we're all focused on the LCD projector and forgot the point you were making.

Oh shoot, my laptop just went to sleep. Bear with me a minute.

Set your laptop not to go to sleep. Even better, don't talk so long on one frame that it goes to sleep in the first place. Liven up your presentation with lots of images and frames. Otherwise, it's not just the laptop that will be sleeping.

This picture's a little dark, but if you could see it, it would show...

If the image isn't great – and that means sharp and high resolution blown up to wall size – don't include it. The only reason to have the darn thing in there in the first place is to illustrate your point. Better not to have an image than to have a bad one. Unless your subject is Goth, lose the dark pictures.

Here I've listed 10 reasons for...

If you just have to include a list, don't put it all on one frame. Take a frame for each point and include different images to illustrate each point. Otherwise we're all thinking of 10 reasons we wish we were someplace else right now.

You probably can't see this, so I'll read it.

Just because PowerPoint lets you include text doesn't mean you should slap up a full page of words in 10-point font on the screen. No one can read them. No one wants to read them. You just lost your audience and the only thing we're reading now is on our BlackBerry.

PRESENTATION SKILLS continues on page 6

**About Lisbeth Cort**

Lisbeth Henning Cort, principal of **Cort Communications** (<http://www.cortcom.com/>), was executive director of the **Utah Heritage Foundation** and **Washington Trust for Historic Preservation** before opening her nonprofit consulting firm.

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COPYWRITING

Ten tips for better fundraising copy

Writing for *Fundraising Success* (www.fundraising-successmag.com), **Jeff Brooks** offers these tips to improve the copy you write (or approve).

Write the call to action before you do anything else. Fundraising, says Brooks, is more about the destination than the journey. You'll arrive a lot more successfully if you know where you're going.

Think of 25 reasons why a donor should give to you. Then, he counsels, get rid of all the reasons that are about you and not the donor.

Ask, "How would *The National Enquirer* write this?" According to Brooks, *The Enquirer* knows the value of the amazing, the lurid, the outrageous, the unexpected — and it milks it. Are you doing that, he asks, or is your writing as colorless and purely factual as possible? The *Enquirer's* approach gets more readers. It raises more funds too.

Ignore your brand guidelines. They're all about you, not about your donors. They're all about self-focused communication, Brooks asserts, and that will hurt your fundraising. "How can I say that, never having seen your brand guidelines?" he asks. "I've read a lot of nonprofit brand documents and not yet have [I] seen one that's nontoxic to fundraising."

Show, don't tell. It's easy to say that something is sad, or great, or special, or cutting-edge. Brooks reminds you to prove it, to give the facts that add up to those things.

Overdo it. Be too dramatic, or too emotional or too strong, he encourages. Most of the time you won't overdo it at all.

If you do, it's a lot easier to tone it down than it is to pump it up.

Use your data. You know quite a bit about the people you're writing to — their names, their cities, what and when they've given, and more. Brooks urges you to use those facts to make your copy more personal and relevant.

Forget what your English teachers told you. When writing fundraising copy, paragraphs don't have to start with topic sentences. Passive voice is not all that bad, he says. Neither are sentence fragments.

Repeat yourself. Say what you want people to do again and again and again. You don't know if they understood or even noticed it the first and second times. Hardly anyone starts at the beginning and reads straight through to the end.

Annoy yourself. You are not your donor. That's one of the most important truths you can know, Brooks asserts. Messages that motivate donors very often will turn you off. Learn to make your own distaste a good barometer for effective fundraising. ↻

Excerpted from Easier Said Than Done: 25 Tips for Better Fundraising Copy, http://www.fundraising-successmag.com/article/not-every-one-easy-do-but-all-them-can-improve-your-fundraising-results-415390_1.html

Jeff Brooks is creative director at TrueSense Marketing, www.trusense.com and keeper of the Future Fundraising Now blog, www.futurefundraisingnow.com. Contact him at jeff.brooks@truesense.com.

We'll get the picture if you get the picture ↻

PRESENTATION SKILLS from page 5

Oops, that's embarrassing, I'm afraid that's my cell phone.

Turn your own cell phone off and ask the audience to do the same before you begin your presentation. This seems like a no-brainer but it's amazing how many times I've heard weird ringing coming from the suit pocket of the guy with the microphone. No one's that important and this tells us your audience isn't that important either.

I wish I had a picture to show you...

No one wishes this more than we do. Use text sparingly — headings if helpful, a few key points to emphasize, a final frame with contact or resource information the audience can look at while you're answering questions.

A hip friend of mine always says, "There's no excuse for bad design." This is especially true in a field with compelling stories — the mother lode of compelling visuals.

PowerPoint is a powerful communications tool if used well; it's absolutely deadly if not. Keep it tight, keep it moving, keep text to a minimum, keep it visually interesting. You've got an important message, you've got our attention. Don't lose it because of bad visuals, boring text, ringing phones, or poor preparation.

Instead, use PowerPoint to your strongest advantage. Engage us, inform us, move us, compel us to care, and challenge us to take action. Leave us wanting more, not wishing for less. ↻

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TRENDS – Janet Gadeski

Challenges grow, yet maturity gives resilience in tough times, Trillium Foundation survey finds

We've grown up. "There's greater maturity in the sector now," explains **Ontario Trillium Foundation** CEO **Robin Cardozo** as he reviews the progress of over 100 Ontario grantees through 2009.

There's no doubt that funding declines have hit charitable programs hard. During their late fall check-in, the charities Trillium monitors shared great concern about the challenges of meeting greater needs with less money.

Yet Cardozo concludes that more skilful governance, board effectiveness and experienced management, combined with a determination to "roll up our sleeves and make it work" rather than blaming governments or funders, are carrying those organizations more confidently through the current recession than through previous economic downturns.

Holding on but worried

A large majority of organizations (87%) have developed plans to manage through the current uncertainty. So far, there have been minimal layoffs or service cutbacks, even though more than 75% of respondents said their organizations were feeling the effects of the recession, up from 30% in January.

As with other regions of Canada, demand for services among Ontario charities is up, particularly for food banks, credit counselling, mental health counselling, and employment counselling. Fundraising is generally (though not universally) down. Almost two-thirds of organizations surveyed reported a decline in funding over the past year, and roughly 30% noted reductions in corporate sponsorships.

After decades as the poor cousins in the charitable world, environmental charities in the current survey expressed a high degree of optimism that their time has come. "Environmental issues are front and centre these days," Cardozo reflects, "and those charities are seeing opportunities to increase engagement, further their goals and perhaps increase donations."

In an open letter summarizing the survey, Cardozo warns of the possibility that organizations overwhelmed by economic issues may be solely focused on day-to-day management at the expense of long-term thinking and planning.

Collaboration benefits increasing

More than 72% of respondents reported collaboration was increasing in the sector. Cardozo identifies that trend as one of the signs of the sector's maturity. "There's more willingness to look at doing things differently," he said, "and the benefits extend far beyond financial savings."

For example, six social service organizations in Guelph came together to hold joint annual general meetings and volun-

teer recognition festivities. The resulting higher-profile event saved money, created much greater recognition for their volunteers and called more attention to their continuing programs. The day's success has led them to look at other ways of collaborating.

"More and more organizations are looking to share premises," Cardozo says. They're moving into underused industrial parks and schools in a trend that he calls very encouraging for the long term. "What they tell us," he explains, "is that sharing started for economic reasons, but they find quite quickly that they share members and users, so joint premises lead to opportunities to share programs and improve services. It can be easier for clients and users too."

"...organizations overwhelmed by economic issues may be solely focused on day-to-day management at the expense of long-term thinking and planning."

He's quite frank about the need for change among funders as well as charities. "Collaboration takes time," he notes, "and that's why it doesn't happen even more." He believes funders could help by supporting the staff time that's required to explore the feasibility of collaboration, plan shared programs or even a merger, and implement and track the results. He'd like to see funders collaborate too, by asking questions and evaluating grants in similar ways to reduce the administrative and reporting burdens on organizations.

Signs of hope

Government funding is the largest unknown for the next two or three years, Cardozo points out. Provincial and federal ministries are the largest nonprofit funders overall, and they're all sending messages about cutbacks and deficit reduction. Nevertheless, he predicts donors and philanthropists will step up to play a stronger role. He's convinced their greater involvement and the sophisticated governance, management and forecasting that he sees among today's nonprofits will carry the sector through this time of economic challenge. ☺

For more information, Alexis Mantell, 1-800-263-2887 ext. 218, amantell@trilliumfoundation.org, <http://www.trilliumfoundation.org/cms/en/challenging.aspx>

LEADERSHIP

Nonprofits need leadership but short-change its development

Leadership: every nonprofit needs it. Current leaders say it's in short supply. Recruitment experts tell us it will be in even shorter supply in the future. Staff members leave nonprofit organizations to develop their own leadership potential elsewhere. If it's so important, why is almost no one working on it?

Ketchum Canada Inc. president and CEO **Marnie A. Spears** looks at the issue in the latest issue of *Philanthropic Trends Quarterly*. "There is no more important time than now [to address leadership development], for as we have seen over the past year, it is those organizations whose leadership is strong and who are continuing to invest in their human resources that have remained effective and progressive," she states.

What makes a leader?

What exactly is leadership? Spears cites **Jim Collins**, author of *Good to Great*, who says leaders are ambitious for the institution, not for themselves. They blend personal humility and professional will into a quality he calls Level Five Leadership.

Paul Marcus, president and CEO of **York University Foundation**, looks for "a generous viewpoint combined with an ability to get things done... [someone who is] able to see beyond their own role and responsibilities and do what's best for York." **Community Foundations of Canada** CEO **Monica Patten** adds integrity and authenticity to the list.

It's a tall order for nonprofits whose budgets are already stretched beyond their limits. Yet leadership development is a must for organizations that want to survive. It strengthens the organization's programs and helps them keep good people longer. KCI's **Tara George** says, "Organizations that fail to invest in developing leaders run the risk of losing high potential employees."

High commitment, low-cost tactics

The most important leadership development tactics depend more on commitment to the process than on extensive resources. Spears lists five that almost any organization can undertake:

1. Make talent development an agenda item on executive meetings once a month, and at board meetings quarterly.
2. Conduct an annual talent inventory, define key growth steps for each employee, and develop meaningful, enriching assignments.
3. Expect managers to have regular conversations about their staffers' career aspirations.

4. Develop a library of books and articles on leadership development, emotional intelligence and effective management.
5. Above all, communicate. Meet regularly with staff and emerging leaders about their aspirations and skill development.

In spring 2005, the *Stanford Social Innovation Review* reported on research that concluded that making employee development a high priority brings major benefit to organizations and improves employee retention rates.

Scott Haldane, president and CEO of the **YMCA of Greater Toronto**, agrees. In his organization, developing future talent is a key characteristic of organizational culture. "I have personally never seen a success or failure that wasn't in some way tied to leadership," he says. "By thinking of our employees as assets, it is easy to develop a mindset that they are worthy of ongoing investment." ☺

Download the complete issue of *Philanthropic Trends Quarterly* and bonus content at <http://www.kciphilanthropy.com/english/explore/trends.html>



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DONATION FRAUD – *Karen J. Cooper***Banyan Tree class action receives certification**

On January 19, 2010, Justice Lax of the Ontario Superior Court of Justice certified a class proceeding brought on behalf of 2,825 individuals who participated in the **Banyan Tree Foundation Gift Program** (the “Gift Program”) against the promoters of the program and a law firm that provided legal opinions in support of the program.

This decision is significant because it is the first certification of a class action relating to leveraged donation gifting arrangements in Canada. The claim against the Gift Program promoters and the law firm will now proceed as a class action.

Background

The Gift Program was operated from 2003 to 2007 and had a structure typical of many leveraged donation gifting arrangements. Each participant pledged a donation of a specific amount to Banyan Tree. Participants contributed 15% of the pledged amount from their own resources. The remainder was financed by a non-recourse loan evidenced by a promissory note.

Participants paid a security deposit to the lender, which was to be invested and used to pay the interest, taxes and principal amount of the loan. Participants received a charitable donation receipt for the full amount pledged, not the 15% they actually paid.

It appears from the decision that **Canada Revenue Agency** has determined that the Gift Program was a sham, and that it has or will have reassessed all of the participants to deny their claims for the charitable donation tax credit related to their participation. CRA revoked the charitable status of the Banyan Tree Foundation in September 2008, largely because of its involvement with the Gift Program.

Plaintiffs claim breach of contract

In their claim against the promoters, the plaintiffs pled breach of contract and negligence, and sought a declaration that the promissory notes issued by the participants as part of the Gift Program are void and unenforceable. The plaintiffs alleged that it

was an express or implied term of the contracts between the participants and the Gift Program promoters that the participants would receive a charitable donation tax receipt that would be recognized by CRA and that they would not be at risk to repay the loans.

With respect to the law firm, the plaintiffs alleged that the legal opinions were a necessary prerequisite for the promotion and sale of the Gift Program, without which the gift program could not have been launched. The plaintiffs contended that the law firm intended the participants to rely on the opinions in deciding whether to participate in the Gift Program, and that the firm was negligent in the preparation of the opinions.

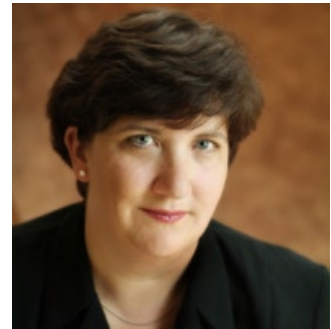
Reasons for certification

The judge applied the test for certification set out in Section 5(1) of the *Class Proceeding Act*. An action must be certified as a class proceeding where the following five requirements are met: (a) the pleadings or the notice of application discloses a cause of action; (b) there is an identifiable class of two or more persons that would be represented by the representative plaintiff; (c) the claims of the class members raise common issues; (d) a class proceeding would be the preferable procedure for the resolution of the common issues; and (e) there is a representative plaintiff who would fairly and adequately represent the interests of the class, has produced an adequate litigation plan, and does not have an interest in conflict with the interests of other class members on the common issues for the class.

The judge was satisfied that the plaintiffs had met each requirement for certification.

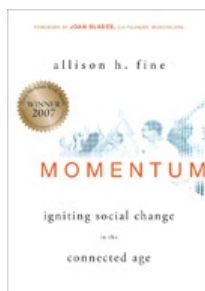


For a more detailed review of the Banyan Tree class action, reference should be made to Charity Law Bulletin No. 190 available at <http://www.carters.ca/pub/bulletin/charity/2010/chylb190.htm>.

**Karen J. Cooper**

Karen Cooper is a partner with **Carters Professional Corporation** in Ottawa and practises charity and not-for-profit law with an emphasis on tax issues. Ms. Cooper also has considerable teaching experience, including as part-time professor at the **University of Ottawa**, Faculty of Common Law, and is a contributing author to *The Management of Charitable and Not-for-Profit Organizations in Canada* (2009, LexisNexis Butterworths).

She can be reached at kcooper@carters.ca.

FIVE MINUTE LEARNING – *Leanne Hitchcock***Momentum: igniting social change in the connected age**

A new and empowering way of looking at and organizing social change! How can we move from serving soup until our elbows ache to solving chronic social ills like hunger or homelessness? How can we break the disastrous cycle of low expectations that leads to chronic social failures?

The answers to these questions lie within *Momentum*, a fresh, zestful way of thinking about and organizing social change work. Today's digital tools – including but not limited to email, the Web, cell phones, personal digital assistants

(PDAs), even iPods – promote interactivity and connectedness. But as *Momentum* shows, these new social media tools are important not for their wizardry but because they connect us to one another in inexpensive, accessible, and massively scalable ways.

Learning to listen

Momentum author **Allison H. Fine** reminds us that we have forgotten that our primary responsibility is to listen to and learn from the people whom we serve. Instead, we spend business time getting tasks done (sending email, writing grants).

FIVE MINUTE LEARNING continues on page 11

AWARDS**Philanthropists, humanitarians rule Order of Ontario awards**

Fourteen of the 29 new appointees to the Order of Ontario have been chosen at least in part for their activities in the nonprofit sector. The winners include:

- **Dr. Philip Berger** of Toronto, a physician and leader in the fields of urban medicine, addiction, homelessness and HIV/AIDS care. He is one of the founders of **OHAfrica's** Tsepong clinic, which delivers HIV/AIDS services in Lesotho.
- **Lawrence Bloomberg** of Toronto, a businessman noted for his volunteerism and philanthropic contributions to health care, commercializing innovation and education in Ontario.
- **Lesley Jane Boake** of Barrie, an educator and founder of **Canine Opportunity, People Empowerment (COPE)**, an innovative service-dog training program for persons with disabilities and youth at risk of leaving school early.
- **Peter Crossgrove** of Sudbury, a businessman and director of mining and natural resource companies who has helped raise millions of dollars for Ontario's health care and cancer care organizations.
- **Fraser Dougall** of Thunder Bay, a media owner and philanthropist who promotes and supports community interests and local projects through his radio and TV programming.
- **Paul Godfrey** of Toronto, a businessman and civic leader. He is known for his leadership in municipal governance, advocating for venerable Toronto institutions, and the creation of the **Herbie Fund**, which pays for life-saving operations for children around the world.
- **Peter Godsoe** of Toronto, a business leader whose philanthropic contributions have supported a broad range of community causes, particularly education, healthcare and the arts in Canada and abroad.
- **Ovid Jackson** of Owen Sound, a politician who made it his life's work to address the needs of young people, newcomers and people with disabilities, and founder of the **Community Foundation Grey Bruce**.
- **Gerry Lougheed (Jr.)** of Sudbury, a funeral director and volunteer leader who has championed many causes from cancer care to hospital development.
- **Dr. Samantha Nutt** of Toronto, a family physician who co-founded **War Child Canada** and has gained international recognition as a leader in humanitarian assistance to vulnerable populations in conflict zones.
- **Dr. James Orbinski** of Toronto, a physician, scientist, internationally renowned humanitarian and founding member of **Doctors Without Borders** and other international organizations aimed at improving global health-care.
- **Ken Shaw** of Oshawa, a renowned local news anchor and philanthropist who works tirelessly for local charities and community events.
- **Janet Stewart** of London, a lawyer who advocates for the advancement of women in the law and is known for her compassion and commitment to philanthropic activities in the London area.
- **George Turnbull** of Toronto, an expert in financial services and a philanthropist whose contributions have supported health care research, community services, education and the arts. ✍

For more information, *Michel Payen-Dumont*, 416-314-7010, Michel.Payen-Dumont@nullontario.ca

IDEAS WE'VE NOTED – Janet Gadeski

Haiti and the rest of us: what's next for non-disaster charities?

Seventy million dollars and counting. That's how much money the Canadian arms of three major aid charities (**Médecins sans frontières**, the **Red Cross** and **World Vision**) raised for Haitian relief work by January 25. Other international relief and development charities report unprecedented results as well. The Salvation Army received \$120,000 in just a few days in its first ever text messaging campaign. The backroom technology that made it possible comes from the **Mobile Giving Foundation**.

Bandwagon unites private and public enterprise

Private enterprise and even some government corporations aren't far behind. The **Liquor Control Board of Ontario** brought in \$126,000 in one week for the Red Cross by asking for \$2 at the cash register. **Air Miles** encourages people to donate points. Benefit concerts, bake sales, fundraising walks, classroom campaigns and **Facebook** pages abound. And then there are the endorsements from celebrities: **Celine Dion**, **Nelly Furtado**, **Michael J. Fox** and **Donovan Bailey**, to name just a few.

In the U.S. the House of Representatives unanimously approved a bill allowing donors to Haitian relief to claim their gift on their 2009 tax return. (The Ministère des Finances in Québec announced a similar measure January 22.) "Are they saying that feeding and sheltering America's growing population of hungry and homeless, caring for our nation's sick or preventing life-threatening diseases is any less noble than the relief efforts in Haiti?" **Greg Fox** wrote on *DonorPower.com* in response to the U.S. action.

Right now we may feel like asking our media the same question.

2004 tsunami didn't impede regular campaigns

What does all this mean for your charity's prospects in 2010? We can look to the 2004 tsunami for clues. Arguably, that disaster occurred at a time when it might have had the greatest possible effect on overall fundraising – the crucial last week of opportunity for catch-up giving, scrambling procrastinators and tax-savvy donors. Yet the **Association of Fundraising Professionals** reported that in both Canada and the U.S., nearly two-thirds of nonprofits raised more money in 2004 than in the previous year (*Canadian Fundraiser*, August 31, 2005).

That's good news for the rest of us. Add to that the fact that the generous response to the Haitian catastrophe occurs at the beginning of a new year of giving, that the economy seems to be recovering (for the time being anyway), and that the sector is more skilled and professional than it was in December 2004, and there may be no reason to tinker with the goals and budgets we've established.

IDEAS WE'VE NOTED continues on page 12



Janet Gadeski, Editor

We are all the complaint department

FIVE-MINUTE LEARNING from page 10

What listening means in the connected age

There is no complaint department. We are all interacting with many people in and outside the organization, and everyone is responsible for listening.

People who are volunteering or receiving services can have many questions, concerns and suggestions. Those serving them need to understand that part of their job is having real conversations with people that will increase their understanding of problems and lead to a decrease in complaints in the long run.

Real conversations take time and practice. Listening is a muscle that needs to be used for organizations to stay relevant. As with any muscles, when we start to use our listening skills we need to start slowly and practice.

Fine suggests practicing listening and responding in ways like these:

"Thanks for your comment. We're going to take all the comments that we've received and report back to our board on

May 21st. We will be posting the minutes from that meeting on our website for the public to review and comment on. I would like to hear what you think after they have been posted."

"I don't know much about international adoptions, but one of our members, Doris McClendon is an expert in that area. Can I put you in touch with her to talk about it?"

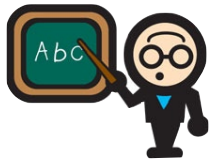
About the author

Allison H. Fine is a successful social entrepreneur and writer dedicated to helping grassroots organizations and activists implement and sustain social change efforts. She is also a senior fellow at **Demos**, a network of action and ideas based in New York City.

To purchase your copy of Momentum at the Premium Leadership Service special discounted price of just \$30.00 visit <http://www.canadianfundraiser.com/Bookroom/productDescription.asp?crypt=DXpwDhYdd2t9f2seeHduBAMUfxgdFXhwdH92cwUQdXZ9eWYDFmULBgw=>

PROFESSIONAL GROWTH

Learning opportunities for fundraisers and other leaders



Golf Tournaments 101: the basics and *Golf Tournaments 401: advanced tips*, **Frank McGrath**, Golf Tournaments Incorporated. Rescheduled to Thursday, February 25, 9 a.m. – noon and 1 p.m. – 4 p.m. respectively,

Osgoode Professional Development Centre, Toronto. Bonus materials include free copy of “The Complete Handbook for Planning and Implementing a Successful Fundraising Golf Tournament,” (retail value \$37). Early bird \$147 +GST for each workshop until February 4; \$177 +GST afterwards.

http://www.canadianfundraiser.com/workshop_viewer.asp?workshop_ID=374

Donor Insights: a dull name for getting the real lowdown on what your donors want, think, believe and will respond to, **Jonathon Grapsas**, Pareto Fundraising. Thursday, March 11, 10 a.m. – 4 p.m., Osgoode Professional Development Centre, Toronto. Early bird \$237 +GST to February 18, \$290.85 afterwards.

http://www.canadianfundraiser.com/workshop_Viewer.asp?workshop_ID=377

AFP Edmonton & Area Chapter, *Foray into the Four A's of Stewardship*, **Lynn Hruczkowski**, Manager, Donor Relations & Stewardship, University of Alberta, **Jane Potentier**, Associate Director of Development, University of Alberta,

Joan Paton, VP, AFP Edmonton & Area Chapter. Thursday, February 4, 11:30 a.m. – 4 p.m., Edmonton Petroleum Club. Luncheon with workshop overview, followed by in-depth presentations. Luncheon, \$30 members, \$35 non-members; workshop \$50 members, \$60 non-members.

info@afpedmonton.ca

First Course in Fundraising. Friday, February 26 - Saturday, February 27, 8 a.m. - 4:30 p.m., location TBA. \$375 members, \$425 non-members.

<http://www.afpedmonton.ca/PDFs/FirstCourse2010.pdf>

PROFESSIONAL GROWTH continues on page 13

Key-To-The Sector Workshops and Webinars 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

Acknowledge disaster, communicate that your clients' needs continue ↩

IDEAS WE'VE NOTED from page 11

Communicating our case

How, then, do we conduct ourselves as representatives of charities not relieving such dramatic need? Above all, says communications expert **Nancy Schwartz**, acknowledge it. “Pretending the disasters didn't happen is the worst mistake your organization can make,” she advises.

It's time for sensitive communication. You may actually go as far as to acknowledge the impact of the earthquake and the contributions your donors and prospects are likely to have made, she counsels. In doing so, you create the opportunity to talk about your issues and the resulting needs that persist even in the face of the Haitian tragedy.

Don't overstate a connection between your organization, services or programs and the disaster, Schwartz warns. Continue your regular media campaigns and press releases, and if your pitch is timely, continue to make it.

Direct mail consultants differ on the immediate impact of the Haitian fundraising efforts. **Lisa M. Deitlin** told *The Chronicle of Philanthropy* that she recommended delaying direct mail fundraising appeals for a few weeks if possible. But Canada's **Fraser Green** contends that the vast majority

of disaster donors are not regular donors to charities in general. Since most of his clients see their greatest returns on the first renewal campaign of the year, usually held in January, he warns against delaying that first critical mailing too much.

Making the most of opportunities

Media coverage of a calamity inevitably declines as new news emerges. In Canada, the Olympics are just one story waiting to crowd the devastating situation of Haitians off our news sites, front pages and airwaves. It's not fair, but it is predictable.

Let us encourage the organizations engaged in Haitian relief to make the most of their limited time in the spotlight. Your solid communications plan, compelling case and knowledge of your audiences will have their usual effect in due time. We will all benefit from media attention to the many ways of giving, both old and new. Above all, we will benefit from the media's celebration of generosity – the real good news in the midst of this tragic tale. ☺

Send Letters to the Editor to jgadeski@gmail.com; follow Janet on Twitter at <http://twitter.com/CFPed>

PROFESSIONAL GROWTH

Sponsorships, gift planning, major gifts and crucial laws



PROFESSIONAL GROWTH from page 12

AFP Greater Toronto, *Warming the 'Cold' Call: Effective Strategies for Major Gift Prospect Identification and Qualification*, **John Greenhoe**, Major Gifts Officer, Western Michigan University. Thursday, February 4, 1 - 2:30 p.m. Toronto location sold out. Needles Hall, University of Waterloo. Added location, Dorothy Ley Hospice, Etobicoke. AFP Webinar. \$20 members, \$25 non-members.

Waterloo location, <http://afptoronto.org/index.php/education-and-events/2010/02/4/329>. Etobicoke location, <http://www.gifttool.com/registrar/ShowEventDetails?ID=1128&EID=6334>

Evaluation Tools That Can Strengthen Your Development Program (Part Two), **Lynda Lysakowski**, President/CEO, Capital Ventures, Ryerson Student Centre. Thursday, February 25, 1 - 2:30 p.m. AFP Webinar. \$20 members, \$25 non-members.

<http://www.gifttool.com/registrar/ShowEventDetails?ID=1128&EID=6048>

AFP Ottawa Chapter, *Warming the 'Cold' Call: Effective Strategies for Major Gift Prospect Identification and Qualification*, **John Greenhoe**, Major Gifts Officer, Western Michigan University. Thursday, February 4, 1 - 2:30 p.m., Laframboise Hall, Saint Paul University. AFP Webinar. \$10 members, \$20 non-members.

<http://guest.cvent.com/EVENTS/Info/Invitation.aspx?e=4c5786ae-6ef7-47f1-a6f7-c7c7cbf4695e>

The Fundraising Gift Chart - The Essential Tool of the Fundraiser, **Eric Dean**, Executive Director, Queensway-Carleton Hospital Foundation. Wednesday, February 17, 6:45 - 9 a.m., Hampton Inn Conference Centre. \$30 members, \$40 non-members.

<http://guest.cvent.com/EVENTS/Info/Invitation.aspx?e=ec8354ae-c281-4637-bdba-a685e796b58b>

Selling Major Sponsors, **Phil Immordino**. Thursday, March 11, 1 - 2:30 p.m., Laframboise Hall, Saint Paul University. AFP Webinar. \$10 members, \$20 non-members.

<http://guest.cvent.com/EVENTS/Info/Invitation.aspx?e=28adbbca-2e1e-4458-8ee3-2d1825efe148>

AFP South East Ontario, *Round table discussion, Senior chapter members*. Wednesday, February 17, 11:30 a.m. - 1 p.m., Portsmouth Olympic Harbour, Kingston. \$15 members, \$25 non-members. *Social Media for the Nonprofit - Understanding how Facebook, Twitter and MySpace Fit into our World*, **Robert Washburn**, E-journalism Professor, Loyalist College. Wednesday, March 17, 11:30 a.m. - 1 p.m., Portsmouth Olympic Harbour, Kingston. \$15 members, \$25 non-members.

<http://afpseo.afpnet.org>

CAGP, *Original Canadian Gift Planning Course*, **Helen DeBoer-Daggett**, Director of Development, Norfolk General Hospital Foundation, **Brad Offman**, VP Strategic Philanthropy, Mackenzie Financial Corporation. Tuesday, March 23 - Sunday, March 28, Banff Centre. \$1250 members, \$1599 non-members.

http://www.cagp-acpdp.org/en/education/cgp_course/cgp_course_march2010.aspx

Annual Conference: Festival of Dreams. Wednesday, May 12 - Friday, May 14, Westin Edmonton. Early bird \$650 members, \$925 non-members by March 26.

http://www.cagp-acpdp.org/en/education/upcoming_conf.aspx

Carters Professional Corporation, *Ottawa Region Charity & Not-for-Profit Law Seminar: Recent Developments in the Law*. Thursday, February 18, 8:30 a.m. - 3:30 p.m., Arlington Woods Free Methodist Church, Nepean. \$25.

For more information, <http://www.carters.ca/pub/seminar/chrchlaw/ott/10/brochure.htm>; to register, 1-877-942-0001 x230, Fax 519-942-0300, seminars@carters.ca

Charity Law Information Program, *Being Good at Doing Good: Safeguarding Yourself and Your Charity in a Complex World*. Monday, February 22 - Tuesday February 23, Toronto Board of Trade. \$495.

416-256-3010 ext 232; 1-877-484-3030; <http://www.capacity-builders.ca/clip/clip-news.php>

Maytree, *Impacting Public Policy*, **Ben Perrin**, Associate Professor, Faculty of Law, UBC. Thursday, February 18, 12 - 2 p.m., St. Michael's College, Toronto. Free. *Talking to the Media*, **Carol Goar**, Editorial Columnist, The Toronto Star. Thursday, March 25, 12 - 2 p.m., St. Michael's College, Toronto. Free.

<http://www.maytree.com/training/five-good-ideas>

Sponsorship Specialists, *Sponsorship: Fulfillment, Activation + Summits*, **Brent Barootes**, President, Partnership Group - Sponsorship Specialists. Full day workshop. Early bird, \$525 +GST by February 28.

- Regina, Thursday, April 8, Globe Theatre
- Edmonton, Wednesday, April 28, City Centre Campus, Grant MacEwan University
- Calgary, Thursday, May 6, Epcor Centre
- Toronto, Tuesday, May 11, Toronto Star
- Victoria, Wednesday, May 19, University of Victoria
- Kelowna, Wednesday, May 26, UBC Okanagan ☺

<http://www.partnershipgroup.ca/pg/>

IN BRIEF

Imagine Canada coaches charities through CRA requirements with Charity Tax Tools website

There's a new website to help the baffled executive director, chair or treasurer through the maze of regulations around receipts, records and reports for charities. *Charity Tax Tools* (<http://charitytax.imaginecanada.ca>) was unveiled January 26, the product of nearly two years' collaborative work between **Imagine Canada** and **Canada Revenue Agency**.

It's intended to support Canadian charities in the areas of receipting fundraising activities, maintaining books and records, and reporting accurately to CRA.

Small and medium-sized charities and the legal and accounting practitioners who support them will find it especially helpful, Imagine Canada says.

More time for mission

"We believe the Charity Tax Tools website will demystify much of the CRA reporting process, save [charities] time and make it easier for them to meet their compliance obligations, thus ultimately allowing them to focus on their missions at hand," says Imagine Canada president **Marcel Lauzière**.

Mindful of the limited Internet access in smaller and rural communities, Imagine Canada designed the site to be dial-up friendly. And for those who can not or prefer not to get their information from the Internet, the content will soon be available in CD-ROM format and in print.

CRA provided funding to develop the website, and has committed some funding towards maintaining it. Three sponsors, **Scotiabank Group**, **Carters Professional Corporation** and **KPMG LLP**, will ensure the site's sustainability.

To learn more about *Charity Tax Tools*, visit <http://charitytax.imaginecanada.ca> or email charitytax@imaginecanada.ca.

Phone fakes assume Lung Association's name

Phone scammers claiming to represent **The Lung Association** have called potential victims urging them to make a donation and reveal personal banking information to facilitate their gift and a supposed corporate matching gift.

"It is extremely disheartening to know someone is representing our organization in such a deceitful manner," says Lung Association marketing director **Jennifer Schenkel**. "This scam threatens our reputation with current and potential donors across the country."

The association's community giving director, **Linda Clemow**, shares the news with a reminder to charitable organizations "to think about how they need to be protective of their name and the industry at all times."

To report a suspected fraudulent solicitation, contact *The Canadian Anti-Fraud Call Centre (Phonebusters)*, 888-495-8501 or 888-654-9426; www.phonebusters.com

iPhone App supports breast cancer foundation

The **Canadian Breast Cancer Foundation** has unveiled what they describe as "the first bilingual iPhone(TM) App in the Canadian charity landscape. The application offers users Foundation news and events in both official languages, direct and fast access to its online communities, the ability to register for the *Canadian Breast Cancer Foundation CIBC Run for the Cure* and check fundraising progress, an easy way to make donations, and automatic access to the latest downloads from the Foundation.

The Canadian Breast Cancer Foundation worked in partnership with **Brawersoft**, who worked pro bono to develop the App. It's available free of charge from **iTunes**. ☺

For further information: *Victoria Mackinlay*, manager marketing & communications, 416-263-7941, vmackinlay@cbcf.org

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Administration and sales offices - The Hilborn Group Ltd., Box 86, Station C, Toronto ON M6J 3M7, 416/345-9403, fax 416/345-8010. **Publisher:** Jim Hilborn, james@hilborn.com; **Assistant Publisher:** Leanne Hitchcock, leanne@hilborn.com;

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Advertising sales and list rentals: Jim Hilborn, james@hilborn.com, 416/345-9403, fax 416/345-8010; *Key-To-The-Sector workshops*, 416/267-1287, fax 416/267-2622, keyworkshops@sympatico.ca.

Subscription rates: One year \$267 + GST, two years \$500 +GST; add \$40 for print form via regular mail. Multiple and bulk rates on request.

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