Yes, that’s what this magazine is about. The big idea, the meaningful change, the upswing that’s truly sustainable. Impact is what matters. It’s what everyone from the donor to the CEO to society in general is looking for from our sector. It’s how we measure the good work that we do, and the change we want to effect in the world.

Impact is also what our clients are looking for from our work together. When we help organizations prepare for a big campaign, we need to think about its impact on their operations, cost of fundraising and future expectations. When we write a case for support, we focus our clients on the impact their donors can make on society. We see the positive impacts of great leadership, and the negative impacts when people who move from job to job too quickly.

A stretchy theme like this allows us to explore things we’re discovering as we work with clients across sectors and around the country. These are the things we talk about around the Offord board table each Monday morning.

How can we use data to quantify impact in a way that makes sense to our donors? On page 9 you’ll see how the YMCA GTA is doing it. What do donors think about when they want to make an impact? Meet some from the university and college sectors on pages 7 and 17. And beyond fundraising, what else do our clients need to have in place to make sure they are having as much impact as they can (check out our review of Engine of Impact on page 9).

Our editorial team thanks you—our clients and friends—for giving us so much to think about, chew on, and send out to you with a great big shazam! And it’s gotten us thinking about our own impact as well. Now in our 12th year of operations with a team of 10, Offord Group isn’t just a fundraising consultancy – although we’re very good at that. We’re strategic consultants in the charitable sector, integrating work in communications, talent development, strategic planning, and analytics. Small but mighty, we customize our work to have the greatest possible impact on yours.

So enjoy! And tell us what you think at info@theoffordgroup.com.
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If you’ve spent any time looking at the trends in our sector, you’ll know what the graphs look like. The charitable sector is growing overall, and so is the number of charities in Canada. Donors are giving larger gifts, but their numbers are declining. Big ideas are generating transformative gifts, but annual giving is stagnating. Not to mention the proverbial “hole in the middle”, where organizations are having trouble filling their major gifts pipelines with mid-level donors.

But today, traditional donations are not the only product on the donor shelf. A new charitable financial model is emerging. “Organizations need to take advantage of venture philanthropy and social investing, as well as traditional philanthropy,” says Narinder Dhami, Managing Director of LEAP (Pecaut Centre for Social Impact). “There is increasing interest among donors and investors to think about doing good through a variety of channels—a holistic approach that requires organizations to ensure they can define and articulate their impact, and ensure they have a rigorous and well thought out plan in place.”

LEAP is a Canadian pioneer in building venture philanthropy, applying a unique global approach that is powered by pro-bono. The Centre works with funders and private sector partners (including the Offord Group—see sidebar) to select, support and enable great ideas which have the potential to scale up. The collective goal? Massive social impact. For example, one of LEAP’s clients, SNAP (Stop Now and Plan) is a program of the Child Development Institute (CDI) designed to help children with conduct disorder manage their actions in the moment. With more than 30 years of research and implementation in place, CDI knew that SNAP worked, and had the results to prove it. But they needed substantial help to scale up.

LEAP’s partners helped analyze the numbers, build a strategic plan, prepare for a fundraising campaign, and build a strong case for scaling up. This is venture philanthropy at work: applying the discipline of venture capital / private equity investing to select, support and scale charities with quantifiable social impact. SNAP is now into the second phase of a highly successful fundraising campaign, securing significant funds from private donors and government alike. The potential for impact is compelling: SNAP is already moving from helping a few hundred children each year, to reaching almost 50% of children in Canada diagnosed with conduct disorder once the program reaches scale.
The sector is hungry for innovative approaches to solving complex, age-old social issues.

Valerie McMurtry, CEO, Children’s Aid Foundation of Canada

Impact investing, in which investors look to achieve both social and financial returns, has also been growing in Canada. Social impact bonds are structured to focus on outcomes — or “pay-for-success” — allowing governments and partners to invest in social services that address significant challenges. This year, the Heart & Stroke Foundation is launching Canada’s first health focused social impact bond, in partnership with the Public Health Agency of Canada and the MaRS Centre for Impact Investment. And other charities are not far behind.

“We are actively preparing to leverage new funding models like social impact bonds. The sector is hungry for innovative approaches to solving complex, age-old social issues,” says Valerie McMurtry, CEO of Children’s Aid Foundation of Canada. And with this, we’ll need more meaningful ways of measuring our impact as a charity. Are we creating positive outcomes and social change? Are we changing young people’s lives? These are not easy questions to answer, or benchmark. But charities that ignore the challenge do so at the risk of being left behind.”

Dhami agrees. “These tools are not for every organization,” she says. “They require a significant shift in culture, approach, and service design. There are many good ideas but often it is difficult to discover those organizations with the leadership, management capabilities, and impact to be market ready.”

Is your organization considering venture philanthropy or impact investing? Tell us how you’re approaching these opportunities at info@theoffordgroup.com.

Since 2012, Offord has been a strategic partner of LEAP: The Centre for Social Impact. Founded by the late Toronto activist David Pecaut, LEAP teams up high potential charities with forward thinking investors and private sector expertise. In addition to Offord Group, LEAP’s partners also include The Boston Consulting Group, Ernst & Young, McCarthy Tetrault, Hill + Knowlton Strategies and perennial design, exposing LEAP’s clients to pro-bono legal, financial, public relations and communications expertise.

**THE OFFORD GROUP IS A FOUNDING PARTNER OF LEAP | PECAUT CENTRE**

- Offord has provided fundraising expertise to many of the investments in LEAP’s “pick few, go deep” portfolio – from SNAP to TRIEC’s Mentoring Partnership.
- LEAP is now supporting ten high impact nonprofits that are using enabling technology to drive impact through their partnership with Google.org & Google Canada in a new innovative accelerator.

For more information visit www.leapcentre.ca

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**FURTHER READING**

The writings of Sir Ronald Cohen, whom the Globe and Mail calls the godfather of social finance and chair of the G8’s Social Impact Investment Task Force.

MaRS Centre for Impact Investment
www.impactinvesting.marsdd.com

The Stanford Social Innovation Review
www.ssir.org
WHAT IS THE FUTURE OF CANADA’S NATIONAL, MULTI-LEVEL CHARITIES?

By ROBIN FOWLER
Senior Consultant, Offord Group and Marts & Lundy

Many of Canada’s biggest national charities were born out of the grassroots—people getting together around a common cause that had personal meaning, often from one’s personal experience with illness, social injustice or other societal challenges.

Fast forward 25, 50 or 100 years and these local organizations have grown and amalgamated, and now exist under wide-reaching national umbrellas. Membership fees, small annual donations, event-driven fundraising, memorial programs, sponsorships and heavy government funding have kept the lights on and the programs running. Particularly outside Canada’s major urban centres, these organizations are a traditional recipient of philanthropic dollars at the grassroots levels. In addition, while national, these charities are often governed by many small boards, varying in character and acting quite independently of one another.

So, while delivering important services to many Canadians, these large multi-level charities may not exert a national influence that’s equal to their collective impact. Enter the impetus for a national campaign, and with it the need for a collective voice. A national board of influence and affluence is sought, but territoriality over prospects, programs, and funds may hinder its effectiveness. Add in the pressure of decreasing government funds and the high staff turnover in the sector and you are steadily fuelling a slow burning fire that pits local value against national presence.

Some charities have met this challenge by amalgamation, in an effort to reduce overhead and duplication, and be more efficient with donor dollars. Others are abandoning lofty national campaign plans to adopt a steady but tempered service-focused model, opting for slower fundraising growth and thus maintaining their reliance on government funding.

What IS the future of Canada’s national, multi-level charities?
There’s no magic bullet. But those national charities with staying power will have several things in common, including the following:

1. IMPACT AWARENESS
   While the names of these charities are often well known, the story of their impact is not. Many suffer from the reputation of being “our grandmothers’ charities.” National charities must invest in informing all Canadians of the important role they play across the country.

2. CONSISTENCY OF EXPERIENCE
   The donor and service experience can vary greatly from a small community office to larger urban centres or the national office. Common models of practice around some areas—donor relations, for example—can be adopted without fear of losing one’s local flavour and independence.

3. A CULTURE OF SHARING
   From donor and financial data to consistent performance measures, federated charities must walk the walk of collaboration. It’s one thing to talk about it, it’s another entirely to create a culture that encourages it. That means no more franchising programs and charging other units to run them. No categorizing the haves and the have nots among your divisions—you all serve the common good (see #1). And no endless arguments over who owns donors, counting and designating. Figure out the fundraising and service model that best suits a culture of collaboration.

4. AN OPENNESS TO CHANGE
   Large organizations with many offices are more challenging to corral. But those who resist change because “we’ve always done it this way” risk obsolescence and a decline in donor dollars. Slow change is fine, no change is not.

5. A COMMITMENT TO STREAMLINING
   This especially applies to the back office—gift processing, finance, human resources and IT. Reduce duplication, make your donor experience consistent (see #2) and make your organization as efficient as possible.

WHAT’S THE IMPACT OF A CAMPAIGN ON BASELINE GIVING?

While many of us talk (or sometimes dream) about post-campaign “lift”—the increase in annual baseline fundraising after a campaign—very little data exists to quantify the phenomenon. So this winter, Offord and Marts & Lundy are examining the issue, with data contributed from several higher education institutions in Canada and the US. With the help of our US analytics team, we’ll analyze longitudinal data tracking pre- and post-campaign giving and publish our findings in early 2018. Stay tuned!
In our profession, we meet many people who want to have an impact on the institutions they care most about. One of my favourite conversations this year was with Michael Richards, BCL’63, McGill University.

Now retired after practicing law for approximately 50 years at Stikeman Elliott, Richards could not be prouder of his alma mater. He notes with pride that both of his daughters are alumni, and one of his grandchildren is now considering attending the university. McGill, he states, is his number one priority for volunteer activity and financial support.

IMPACT STARTS WITH ENGAGEMENT

Richards is tremendously grateful to McGill for the opportunities it provided him, and it shows. He has been a consistent donor to McGill over the years, and his journey as a donor has evolved in tandem with his extensive and varied involvement as a volunteer.

Shortly after receiving his first degree from the Faculty of Arts, he was approached by a Development Officer who asked him to remain involved with the school and solicit his peers for the Alma Mater Fund. No one could have known the importance of this first ask. “That was the seed that got me in giving mode,” he says. From then on, Richards remained involved with McGill in various capacities over the years — with the Law School, the Alumni Association, the Board of Governors and the Building and Property Committee. This involvement served to cement his connection to the university, and develop his keen understanding of the gap between government funding and the institution’s needs. He even acted as interim Vice-Principal, Finance and Administration for seven months. “I feel really connected to McGill because of the things I’ve been able to do here, and to help.” Reflecting on his ongoing volunteer experience, he says with a chuckle, “They just kept asking me. I never figured out a way to say no.”

IMPACT OF SCHOOL PRIDE

Athletic involvement was pivotal to his desire to stay involved with McGill, “Wearing the sweater, playing a sport you love and representing the University as a team, this gets you more involved,” says Richards. There is tremendous school pride as a result of this type of involvement. He notes, “When I think back to our last capital campaign, many of the leaders were involved with intercollegiate sports as students.” Not surprisingly, Richards has chosen to support athletics at McGill, first through endowed scholarships and subsequently through a bequest intention.
FUTURE IMPACT: PLANNED GIVING

When asked why he decided to become a planned giving donor to McGill, he replied with a laugh, “Well, I’m not a donor yet. But, I’m committed!” This decision was the natural evolution of his thinking and his passion for his alma mater, “When you’re young, you’re too busy providing for your family and getting a decent standard of living; Making this kind of a gift was a natural thing to do as I got older.” He continued, “I can give more that way, at the end of my life. As long as I’ve provided for my family, I want to give back.”

FULL CONTACT

“Regular, personal contact is key,” says Richards of McGill’s annual tea recognizing donors who’ve indicated an intention for McGill in their will. “Hearing the Principal as well as one of the scholarship recipients speak is very meaningful, as well as seeing peers who share your intentions. When you get older, a sense of purpose and a sense of belonging are both things we need.” As a donor, and an ambassador for McGill’s Planned Gifts and Bequests Program, Richards continues to note the importance of staying in contact with donors. “So often when I talk to people they say ‘I was called by x, I made a donation, and I never heard from them again.’ This personal contact is so important. A lot of people also say ‘I would give, but nobody’s ever talked to me in person. They just put something in the mail.’ ”

The path to a legacy gift, most often involves many meaningful points of contact over many years. Richards reminds us that impact is not just about a singular point in time, but can be more like a continuum, or crescendo throughout a person’s lifetime. Institutional pride, continuous involvement and personal contact are all elements that contribute to donor decision making, and ultimately philanthropic impact. Most tellingly, by supporting athletics, Michael Richards is arguably strengthening the same bonds that connected him to the university in the first place, in the next generation of McGill students. And in our business, he is having one of the most important impacts of all—building donors of the future.

MICHAEL RICHARDS BA’60, BCL’63
McGILL UNIVERSITY
Q: TELL US HOW YOU’RE USING RESEARCH TO MEASURE THE IMPACT OF THE YMCA GTA.

A: In three different ways. We are developing an impact measurement and improvement system to measure the impact of participating in YMCA programs: understanding the contribution that our Centres make to the health of their respective neighbourhoods, and more generally, the Y’s contributions to the health of people living in the GTA. We’re also trying to ensure that by 2020, we will have integrated impact measurement into all of our youth programs, so we can continue to refine them. Finally, we’ve developed a GTA-wide health monitoring system to inform our strategies and ensure our services are providing social value targeted to the needs of the population. All this data helps us understand emerging health needs, the contribution we are making to the health of our city, and the reach of our programs in relation to those needs.

Q: WHY ARE YOU DOING THIS RESEARCH?

A: We’re very focused on making sure these Centres have impact. We want to do more of what we are doing well. More importantly, we want to be open to understanding where we can do better. This research informs future programs, investments and potential locations for new Centres.

Q: HOW ARE YOU APPLYING THE RESULTS TO YOUR PROGRAMS?

A: In 2013, we completed baseline research to gain insights across all of our locations, including the catchment area for the Cooper Koo YMCA, just opened on Cherry Street. We have other communities in the pipeline for similar baseline research (even before new Centres open) so we have an understanding of neighbourhood needs. Our research also helps us decide where Centres of Community will be located. We target high priority neighbourhoods, and look at the surrounding 3-5 km service area to assess neighbourhood needs, ensuring we are not duplicating services and can make an effective contribution to the health of local residents. The YMCA can be a force for prevention for social issues. We want to get there before problems arise.
Q. **HOW DOES THIS MATTER TO YOUR DONORS?**

A. This is a great opportunity for fundraising to be more transparent and to explain the precise impact of philanthropy. Our donors want to know that we are measuring ourselves. They want to see that the community is a better place, and how lives are improved because of their philanthropy to the YMCA. But they are not expecting consistently positive results—together we can use the data to understand our impact, and where to change course or shift direction. In addition, our research offers not just the numbers for our donors, but multiple proof points and individual stories. Impact research makes for great stewardship. When stories are backed by research, people feel better about giving. It offers a demonstrable ROI on the work we are doing.

Q. **WHEN AND HOW MIGHT ALL THIS RESEARCH COME TOGETHER WITH THAT OF OTHER SOCIAL SERVICE AGENCIES?**

A. Many charities are engaged in evaluations to better understand the impact of their programs. However, most have not yet integrated this as an ongoing component of their work. The approaches aren’t yet standardized—different organizations measure different types of impact. As a result, the charitable sector is a long way from having an integrated impact measurement system. “Collective impact” is being explored by some organizations, but this hasn’t been widely adopted. In the meantime, the YMCA is committed to making our research available as a public resource. We hope other organizations will use it to further their own impact measurement efforts. Ideally, it could offer some standards for developing a shared approach to improving the health of the communities we serve.

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**Engine of Impact: Essentials of Strategic Leadership in the Nonprofit Sector**

*By William F. Meehan III & Kim Starkey Jonker*

Book Review by Jennifer Bizzarri


While it’s focused predominately on the US market, the book offers case studies (including a shout out to proudly Canadian—and current Offord client—*Right to Play*) on the various things that make your organizational engine run smoothly. With a chapter dedicated to each component of the engine (see below), Jonker and Meehan aptly demonstrate what many of us know in our guts—that mission is critical, and that your organization will go nowhere without the holy trifecta of funding, talent and good governance. While dense with historical research and detailed examples, the book invites you to join the authors as learners, aptly demonstrating where organizations can either rev up or run out of gas (my analogy, I couldn’t help myself). It’s not easy to find a well-researched business book aimed at our sector. Worth a read.

*Engine of Impact: Essentials of Strategic Leadership in the Nonprofit Sector* by William F. Meehan III and Kim Starkey Jonker, Foreword by Jim Collins. © 2017 by the Board of Trustees of the Leland Stanford Jr. University. All rights reserved. Published by Stanford University Press in hardcover, paperback and electronic formats. No further reproduction is allowed without the publisher’s prior permission, sup.org.
Based in Arizona, our Marts & Lundy Senior Counsel colleague Dan Saftig spent the last year interviewing some of the United States’ best-known leaders in higher education advancement. Inspired by a cover story in the Harvard Business Review (What Sets Successful CEOs Apart? May-June 2017), Dan set out to find what Level 5 Leaders (a term made popular by Good to Great author Jim Collins) had in common within the field of Advancement. He began his work by surveying 100 chief development officers and then narrowed his list down to ten personal interviews with leaders of six public and four private institutions, from Boston College to Texas A&M to Stanford. For the purposes of his study, all ten interviewees met the following criteria:

- Served as Chief Development Officer for the same institution for 10 years or more
- Generated philanthropy of $100-million or more on an annual basis
- Conducted a $1-billion plus campaign

Here are ten common traits Saftig found among great Advancement leaders:

1. **They are students of leadership.** By virtue of their work, they interact with other leaders in business, government and academia. They have their own leadership mentors, and have a front row seat to what works and what doesn’t. And they are always ready to learn.

2. **They’ve paid their dues.** Leadership doesn’t happen overnight. The average number of years in Advancement is 34. On average, they’ve only worked at three institutions. Many of them were generalists in their early jobs at smaller institutions where they did everything.

3. **They have humble beginnings.** These leaders are not from privileged backgrounds. All 10 had jobs in high school and college. Only two of the ten hold a PhD.

4. **They found their mojo while working.** While you might expect advancement professionals to be young leaders in school and university, most of this group wasn’t. In fact, several self-identified as slackers in their student days! Their leadership germinated later in their careers, when they proved themselves in entry level jobs or “landed” in this thing called fundraising.
They are one with their institution. The bond between this level of leader and their institution is truly a calling. They fit. Their heads are not on a swivel for the next opportunity.

They take care of themselves. Their work is demanding on their time, lifestyle, eating habits and family life. Many learned the hard way that it’s a marathon and not a sprint. Exercising regularly, limiting volunteer involvement, attending late night gatherings no more than twice a week—many used these strategies and others to save their sanity and their personal lives.

They possess the three “C”s: Character, competence and commitment. When asked to score a list of 20 leadership traits, these were universally non-negotiable. Do the right thing when no one is looking, and follow through with what you say you are going to do. Saftig also observed that while each leader was pleasant and kind, they didn’t suffer fools.

They have high emotional intelligence. These leaders must be as comfortable with the difficult President as they are with the kind-hearted elderly alumna. They have a high degree of self-awareness and self-regulation, they know that fundraising is a team sport, and they are aware of their own impact, from their body language to their every day social proficiency. Combining personal humility with professional will, they also know how to make difficult decisions when necessary.

They are mature in their response. Level 5 leaders recognize that failure of any task begins with failure of leadership. They battle cynicism and negativity and think before they speak. They praise in public and criticize in private. They are above gossip and hold a deep reservoir for confidential information. They have a small inner circle of trusted advisors.

They see what others can’t. These leaders actively advance toward their preferred future and bring others with them. They don’t just see, they do. They see the forest, the trees, the icebergs and the speed bumps, and they act accordingly, spotting trends, anticipating what’s ahead and rehearsing for situations they will encounter.

It’s an interesting list, and one that we think applies to many of the incredible leaders we’ve met among our clients. Want to add your own thoughts or insights? Contact Dan at saftig@martsandlundy.com.
Fundraisers do a lot of writing. Words are powerful, and when we string them together in just the right way we can tell a story, make our case and appeal to our donors to support our cause. But when creating a proposal or case for support, remember all the other things that you can do to communicate with the reader. Think about other things, like images, infographics, and animations that can bring your story to life. Whether in print or online, the images are where your reader’s attention will go first, so don’t make them an afterthought. Consider how these things impact the reader right from the start, engaging your graphic or web designer early on in the process of telling your story.

At Offord, we have the great privilege of flexing our storytelling muscle with a wide variety of smart clients and talented design partners.

Here are three examples of how this expertise and teamwork played out in our cases for support.
“We knew that many British Columbians didn’t really think about how important the services of VGH and UBC Hospital were to the entire province. So the map served several purposes—reinforce the importance of the hospital throughout the province; introduce real people and flesh out their stories; and encourage donor interest from outside the Greater Vancouver area.”
— Tiffany Kraus, Director, Marketing & Communications
VGH & UBC Hospital Foundation

“A major focus of our campaign is making Live Chat available 24/7—right now it’s our most in-demand service, and it’s only available 40 hours each week. Youth in crisis often prefer to type than talk. When we meet with donors, this spread really helps them understand why.”
— Marilyn Brown, Vice President, Revenue Development
Kids Help Phone

“This is a visual and interactive spread that immediately engages donors with the experience of real Pathways students. Here, donors can see the real barriers students face living in low-income communities—barriers that affect their chances of graduating from high school. It is a great conversation starter with donors to see how we support students at every step along their path to success.”
— Quinn Bingham, Vice President and Chief Development Officer
Pathways to Education
Today, more and more charities have the ability to conduct in-depth analytics to guide their fundraising plans. How do they set the right campaign goal? What motivates donors to give now, and what would motivate them to give more? Where does your organization fit into the philanthropic marketplace? Increasingly, board members expect the fundraising team to have an expertise based upon analytics, and are keen to put evidence-based strategies in place, as well as the right metrics to hold leadership accountable.

Most analysts aren’t strategists—and vice versa. As a consequence, many organizational leaders are frequently overwhelmed by statistical and quantitative data. They often lack the time and skills to effectively interpret data to drive strategy. Equally risky is the inclination for leaders to implement big ideas without undertaking analytics at all—not knowing whether their reach exceeds their grasp.
Analytics generally seek to answer a few central questions:

Why do donors give to us now? What would motivate them to give more? How loyal are they as donors, and how do we improve their loyalty? Why do people choose *not* to give to us and what would motivate them to do so?

**Database Analytics** provide a thorough assessment of an organization’s database, answering questions about the overall capacity therein, the potential to give more, and the overall constituency profile and behaviours. Increasingly, these datasets are being used to create predictive models for campaigns that can replace traditional feasibility studies.

**Marketplace Assessments** define an organization’s market, gauge attitudes, opinions and inclinations to support the organization, and compare it to competitors in a particular geographic region. The insights from marketplace assessments can be crucial for guiding strategy. At an early stage of planning for a major building project, a marketplace assessment for one hospital client estimated the total yield that could be raised in a community of that size over a set period of time: this information played a key role in informing the building planning process.

**Benchmarking** looks at both organizational performance in comparison with identified peers and best practices that can lead to improved productivity. Benchmarking data can often uncover surprising information: our work with one client revealed that relative to size of community, it was the dominant health care charity, raising disproportionately more than its benchmark institutions. This insight gave the leadership a better perspective on their current position in the marketplace, and their opportunities moving forward. Remember, however, that benchmarking requires a careful selection of appropriate peer cohorts: organizations with similar sector profiles and marketplaces. It’s too easy to be at the top with weak cohorts, and at the bottom with strong ones.

**One-on-one Interviews and focus groups** with opinion leaders, such as board members, program staff, and top donors can never be replaced as a source of strategic information, since these are the people that disproportionately either push ambition or constrain growth. These conversations are also vital opportunities for our clients to effectively manage expectations around key volunteers, donors, and program staff.
Today, Paul and his wife Gerri are committed donors to many colleges across the country. He is also an advocate of the system, serving as a director of Colleges and Institutes Canada. At Toronto’s Centennial College, the Charettes have created two endowed scholarships in the School of Engineering, Technology and Applied Science — one in architectural technology and one in environmental studies. While these areas relate to Paul’s own education and career, it was Centennial’s commitment to access and the quality of the experience that cemented his decision to give. The Charettes exemplify the maxim that donors give with their hearts and their heads.

Being passionate about the cause is only the start. They are thoughtful and thorough investors as well. We asked Paul what he and Gerri look for when making their philanthropic decisions:

1. **Vision and leadership.** “Meeting Ann Buller (Centennial’s president) was all I needed to give me the interest to explore Centennial further,” he says. “I was so impressed with her compassion and her view of what the college system can do.”

2. **The ability to change lives.** Charette’s life was changed by a bursary. He now seeks out opportunities to help disadvantaged young people in the same way. “We often give to colleges in the areas I graduated in, but we give to Centennial because of the population it serves. Over 80% of their students receive some kind of financial aid. With such a demonstrable need, I know we can make a real difference.”

3. **An organization that understands what they want to accomplish.** “We make donations on our own terms. I’m passionate about what I’m passionate about. I’m not interested in being encouraged in another direction, just because it might be a big need at the institution,” he says. “Institutions need to understand their donors to understand what the ask should be.”
Helping a critical sector grow. Charette sees the college system as growing in impact and influence. As a private sector CEO, his industry relied on skilled college graduates as well as the growing research colleges engage in. “Colleges have some catching up to do compared to universities in terms of attracting donations,” he says. “I come to the college sector with a philanthropic mindset. I see that many places are understaffed and under-resourced in development, and that’s a disadvantage.”

Leveraging his donation. “I do encourage colleges to look at their investment policies, because I’d like my donations to have as big a financial impact as possible,” Charette says. A challenge in the sector is provincial control over colleges’ freedom to invest funds. Charette believes these policies hold colleges back in an era when returns from community foundations and donor-directed funds are much more robust.

Feedback, stewardship, and stories. “As a donor, you need to get the feedback about where the money is going, whether it’s having the intended impact, and who it’s affecting,” says Charette. “My alma mater, Red River College, does a great job keeping me in the loop. And Bow Valley College is one of the best at stewardship. I’ve been able to meet many scholarship recipients and their stories are so moving.”

“I come to the college sector with a philanthropic mindset. I see that many places are understaffed and under-resourced in development, and that’s a disadvantage.”

— Paul Charette

REQUIRED READING

The Philanthropic Mind by Chuck English and Mo Lidsky (Dog Ear Publishing, 2015). An exploration of the motivations and insights that drive Canadian philanthropists. The authors conducted dozens of personal interviews with top Canadian donors, querying their passions, defining experiences, joys, and challenges.

The Givers: Wealth, Power and Philanthropy in a New Gilded Age by David Callahan (Knopf, 2017). An examination of the impact of today’s top philanthropists. Callahan explores the inequality in the United States and the power of big philanthropy to change the world, but not always for the better.
IMPACT OF PHILANTHROPY ON SOCIAL CHANGE

By CHERYL RODDICK
Associate Consultant, Offord Group

* DRIVING AND SEATBELT LAWS
* RESPONSES TO THE AIDS EPIDEMIC
* PROTECTION OF THE RIGHTS OF CHILDREN
* STRATEGIES TO COMBAT FAMILY VIOLENCE
* ENVIRONMENTAL PROTECTION

A few of the many changes in Canada powered by the charitable sector, and fueled by philanthropic support.

In what is being touted a major win for Canadian charities, the Canada Revenue Agency recently recommended major changes to laws and regulations that will encourage charities to engage more fully in public policy dialogue. The Executive Summary of its recent report, Consultation Panel on the Political Activities of Charities (March 31, 2017), underscores the unique position of charitable organizations to inform public policy decisions:

“Charities have long played a critical role in our society. Along with providing much-needed programs and services, they serve all Canadians by pressing for positive social and environmental change. Charities bring commitment and expertise to the formulation of public policy, develop innovative solutions to issues and engage a diverse group of stakeholders, many directly affected by the matters under discussion. This is particularly valuable in an era of complex social and environmental challenges and constrained government budgets, where all informed perspectives and ideas are vital.”

This is encouraging news for Canadian charities, and upholds the historic role of the sector in driving vital social change. Although one may naturally think of the government when it comes to shaping public policy, many of the significant changes in society have been driven by charities.

The main reason for this is a practical one: charities are at the front lines of dealing with social issues downstream, and are intimately familiar with the public policy flaws and gaps that drive people to their doors. Charities know all too well that they can help ameliorate the effects of social issues like homelessness or poverty, but no amount of money will ever eradicate them. Doing so usually requires policy changes at the government level. The first-hand experiences of the charitable sector offer vital insights into the effects of public policy, and can provide innovative ideas around solutions.
Philanthropy, often at the forefront of charitable engagement, effectively acts as a bridge between the charity and the broader community. Philanthropy’s associated activities—building relationships, volunteerism and effective communications—provide all the elements for fostering not just financial supporters, but allies.

If we can combine the power of philanthropy with increasing donor sophistication and desire to more fully understand and engage in a charity’s context and mission, then we’ve created a potent recipe for broad impact.

At The Stop Community Food Centre, a Toronto-based organization that provides dignified access to emergency food and community building programs in a low-income neighbourhood, Executive Director Rachel Gray says that conversations with donors about the role they can play in contributing to social change have always been part of the organization’s DNA.

“How far you delve into those conversations is a bit of a balancing act,” says Gray. The Stop started as one church’s response to a crisis they saw around them. From the very beginning, The Stop has been about volunteers trying to engage in both attending to immediate needs, and advocating for social policy change. “But we want out donors to play a role in challenging the systems that lead to the poverty, illness and isolation we see in this community.”

Sometimes bringing donors and potential donors in for tours to see the need in the community for themselves is enough of an eye opener. For those who wish to delve deeper, The Stop has well-articulated messages and positions on social policies, and is regularly called upon by various levels of government to provide their input. This kind of alliance building is slow, difficult and its results aren’t easily measured, even over many years of a donor relationship. But for moving the dial on social issues, philanthropy is an important tool for civic engagement, and often the entry point for a long, deep and impact-focused relationship.

“For The Stop, philanthropy is not just about gaining financial support. We’re building awareness and allegiances across communities and social backgrounds, and in effect leveraging social change. Conversations with donors are a critical step in the social solidarity we are trying to build.”

RACHEL GRAY
EXECUTIVE DIRECTOR,
THE STOP COMMUNITY FOOD CENTRE
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