

On Target

AFP OTTAWA CHAPTER

Fall 2010

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On Target is an electronic publication of the Ottawa Chapter of the Association of Fundraising Professionals (AFP). It is distributed regularly throughout the year.

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Best Practices in our Community

Strong Management on a Shoe-String Budget

By Kelly Ducharme
with Jocelyn Lamont

If Jocelyn Lamont gets her way, the days of “grassroots” and “shoe string budget” charities being at odds with “strong management” will soon come to an end.

As the Executive Director of the Candlelighters Childhood Cancer Support Programs – a small local charity that supports young cancer patients and their families – Jocelyn has learned strong management practices help charities do more with less.

“Having strong management practices in place, even in a small organization, is key,” Jocelyn asserts. “Charities that have policies and plans in place, I believe, fare better during economic decline. It means you don’t need to panic when CRA comes to do an audit.”

This is a big issue for fundraisers, since it impacts their ability to raise much needed money.

In fact, in order to gain donors’ trust, you may have to prove that you have strong management practices in place. The fundraising process often becomes the force that leads charities to realize they need policies and strategies.

So what exactly is “strong management”? I recently caught up with Jocelyn to get her advice, to share with all AFP Ottawa members – many of whom work for small charities.

“It must be made up of sound financial and human resources management. As well, good infrastructure, strong policies and accountability allow for self-evaluation. This allows others to evaluate if yours is the kind of charity with which they want to be involved.”

Jocelyn shared some advice to help you get started:

Get buy in from all stakeholders:

- Individuals working for charities have good intentions. However, some don’t understand the relevance of strong management. Or, they may believe it’s only for larger organizations. It’s your job to convince your colleagues that it’s vital.

Create policies and put them into practice:

- Developing policies and procedures for human resources, financial management and investment, and fundraising needs to happen from the beginning. Even aspects about programming need attention. For example, what’s your policy about how you’ll manage collaborative projects with community partners?
- What is the role of your board versus staff? “Job descriptions for all staff, volunteers and board members, and regular performance evaluations will help!”
- Are you going to have a financial reserve fund? “When things are going well, it’s hard to see the relevance. But when things aren’t going well the risks stare you in the face and you’re thankful you have it.”
- But developing policies is only half the task. It’s critical that you implement the policies. Jocelyn says, “Believe me, if you don’t, your volunteers, donors, community partners and beneficiaries will notice this shortcoming very quickly.”

Continued on page 3...

Upcoming AFP Ottawa Educational Sessions and Events

**Wednesday,
September 22/10**

Breakfast for Success
Career Planning

**Wednesday,
October 20/10**

Breakfast for Success
Planned Giving

*Presented in partnership with the Canadian
Association of Gift Planners – Ottawa
Chapter

**Monday,
November 15/10**

Special Event
16th Annual AFP Ottawa
Philanthropy Awards

**Wednesday
November 24 /10**

Breakfast for Success
Major Gift Fundraising

**Wednesday
January 19/11**

Breakfast for Success
Holistic Approach to Life
Balance for Fundraisers

Visit www.afpottawa.ca
and watch your email
in-box for more info!

Locations:

Breakfast for Success - Hampton Inn
Ottawa Conference Centre
Philanthropy Awards - Chateau Laurier

Session details subject to change.

Member Spotlight

Michael Wolfe, CFRE Headmaster, Stanstead College

Interview conducted by Bruce Hill, CFRE / Article written by Kim Strydonck, CFRE

Editor's Note: Michael Wolfe was a founding member of AFP Ottawa, serving on its inaugural board of directors. Although he has since moved from Ottawa, he has strong roots in this community. He remains an AFP member, now with the Quebec chapter. This article represents part of AFP Ottawa's efforts to highlight our founding members during AFP International's 50th anniversary year.



How did you get started in fundraising? Where do your roots in Ottawa fit in? It was really by fluke. I was working as the Executive Director of a YMCA branch in Winnipeg, which involved some fundraising. I then moved to Toronto and was hired by Ketchum Canada, where I was involved with a number of campaigns all over Canada. Thereafter I did a brief stint here at Stanstead College. It was then that life led me to Ottawa. I got married and we moved to the capital. I took a position as Vice-President of Development at the Canadian Museum of Civilization and the Canadian War Museum. Most notably, I worked on the campaign for the new War Museum.

Tell me about your involvement with and memories of AFP Ottawa. It's when I was with the Museums that I got involved with AFP Ottawa. That was in 1995. It was the chapter's early days, when we were called the Ottawa Fundraising Executives. [It was around this time that the OFE was merging with the National Society of Fundraising Executives, just before the name change to AFP in 1998]. I was a board member, responsible for the educational program.

Looking back on your time in Ottawa is there any one fundraiser who passed along sage wisdom to you that still sits with you today? Many. On the AFP side, Tom Hewitt was a great friend of mine and instrumental in getting the chapter going. Betsy Clarke was a driving force and should really get the credit, along with people from the FLA Group, for making sure the chapter got up and running.

You're no longer in a strictly fundraising position. How does your experience in fundraising contribute to your success now? I'm not out of fundraising by any means now. I always used to be the person chasing the leaders of organizations to do fundraising. Now I've got a better understanding of what it's like to be the head of an organization. Currently I spend at least 30% of my time – maybe more – on fundraising. It's top of mind most days.

Find out what else Michael Wolfe has to say about AFP Ottawa and fundraising.
[Click here to listen to the full interview \(audio file\).](#)

TOGETHER WE MAKE IT HAPPEN

The driving force behind organized philanthropy is the
professional fundraiser.

He or she serves as a promoter, advocate, solicitor, enabler and steward of relationships, acting with the highest ethical standards of solicitation and the technical competency to facilitate the gift and the donor's wishes.

Please make a gift to our Every Member Campaign and help the Ottawa Chapter of AFP continue to enhance the professional experience of our members.

[Click here to make your donation online.](#)

Congratulations to the 16th Annual Philanthropy Awards Recipients

Roger Greenberg
Outstanding
Volunteer Fundraiser

Maplesoft Group
Outstanding
Corporate Philanthropist

Tereza Top
Outstanding
Individual Philanthropist

bitHeads
Outstanding Small
Business Philanthropist

Algonquin College Event
Management Students
and Faculty
Outstanding
Philanthropic Group

Ryan Williams
Outstanding Individual
Youth Award

**Please join us in
honouring the
2010 recipients!**

**The 16th Annual
AFP Ottawa
Philanthropy Awards**

PRESENTED BY



**Monday,
November 15, 2010
Ballroom,
Fairmont Château Laurier
Dinner. Music. Celebration.
An evening to remember.**

Tickets on sale now.

**Click here to
Reserve your Spot!**

Best Practices in our Community (Continued from page 1)

Use the many available resources:

- Jocelyn suggests, "Draw from your board and others closely involved with your organization. Be open to accepting advice and even criticism – it will help your charity grow!"
- Jocelyn highlights, "The AFP was instrumental to my quest to gain an understanding of what resources are available. So don't hesitate to call AFP, or contact a fellow member for advice."

As you implement strong management practices you'll quickly see the benefit. Jocelyn muses, "You never want to wish a poor experience on any organization. But if they go through it and come out alive, they'll probably have learned how important it is to have strong management practices in place."

And since it will help your charity to be stronger, you'll be more able to serve the community. Your staff, board, volunteers, donors and beneficiaries will appreciate that.

Interested in seeing an On Target article that features your charity or consulting agency? We'd like to hear about a fundraising practice that your charity successfully established. Contact us at jothurlbeck@rogers.com.

"Ask Leah"

By Leah Eustace, CFRE



Leah Eustace, CFRE
President, AFP Ottawa

I understand the importance of cultivating and stewarding donors, but I work for a national organization with a minuscule travel budget. How can I steward them without meeting them face-to-face?

Having been both a grant-maker and a fundraiser with a national organization, this is a topic that I've spent a lot of time thinking about. In my opinion, donors are more impressed with sincerity than with face-to-face visits. A heartfelt thank-you note, update by phone, or 'thought you'd be interested in this' note go very far in building relationships.

A few ideas: invite donors and sponsors to visit you (often, their travel budget will be more substantial than yours); use volunteers in other parts of the country to drop off thank you notes; and, send donors photos of the project they're funding, along with a story that shows how their support is having an impact. At the same time, make sure your funders have the name and direct phone number of someone they can call at any time with questions or concerns.

Be respectful, transparent and sincere and you'll find that your relationships with donors will prosper.. whether or not they ever meet you face-to-face.

Please send your fundraising questions to jothurlbeck@rogers.com, subject line "Ask Leah." LIRE CET ARTICLE EN FRANÇAIS À LA PAGE 4.

Looking
for qualified staff?

Want to get a
message out to
local fundraisers
and
non-profit leaders?

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Your \$175
investment* will
get the word
out to the right
crowd.

Call 613-590-1412
for more details.

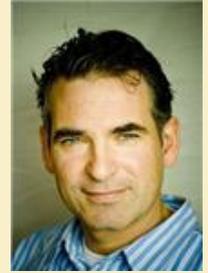
* \$175 for members
\$225 for future members

How AFP Ottawa Serves You A Word from Your Chair of Education

By Bernie Forestell
with Chelsea Dunn

Having been in the fundraising profession for 14 years, and involved with AFP Ottawa for 5, I know the value of continuing education.

Becoming the Chair of AFP Ottawa's Education Committee was an important step in my professional development. The Education Committee keeps busy by developing top-notch sessions, delivered by the best experts available in keeping with your professional development needs. This year, the committee will continue to do our best for current and future members by creating interesting and valuable learning opportunities and by introducing new approaches to trusted techniques – as well as a friendly environment in which to network and share experiences. What's been very exciting recently is seeing more fresh faces attending our sessions!



Bernie Forestell

On behalf of the committee, I would like to thank everyone who has attended and encourage anyone who is thinking about it, but can't find the time, to reconsider. Check out the margin of page 2 for upcoming sessions.

As in any other profession, moving forward is essential to success. The biggest step I've taken was starting my own business, Forecast Response. I work with clients by interviewing subjects for fundraising appeals and supporting their writing and production with my background in marketing.

In the end, the most important thing to remember is that, the better we are at our jobs, the better we can represent our donors.

See you soon,

Bernie Forestell
Forecast Response
613-226-8345
bernie@forecastresponse.com

« Demandez à Leah »

Par Leah Eustace, CFRE



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

Je comprends l'importance de fidéliser les donateurs, mais je travaille pour un organisme national dont le budget de voyage est minuscule. Comment puis-je les fidéliser si je ne peux les rencontrer en personne?

Ayant occupé les postes de subventionneur et de bailleur de fonds au sein d'un organisme national, j'ai passé beaucoup de temps à réfléchir à cette question. À mon avis, les donateurs sont plus impressionnés par la sincérité que par les rencontres en personne. Une note de remerciement chaleureuse, une mise à jour téléphonique ou un message du genre « j'ai cru bon vous envoyer ce qui suit » peuvent aller très loin dans l'établissement de relations.

Voici quelques suggestions. D'abord, vous pourriez inviter vos donateurs et vos commanditaires à vous rendre visite (souvent, leur budget de voyage sera plus important que le vôtre). Vous pourriez également demander à des bénévoles d'une autre province d'aller livrer vos notes de remerciement en personne.

Suite à la page 6...

AFP is 50 !!!!!

If you attend educational sessions, take advantage of networking opportunities, or benefit from many other local initiatives, you know that your local AFP chapter contributes to your success.

Have you ever wondered what AFP International does for you?

• AFP Membership

Directory: Members tell us time and again: Networking is a valued benefit. You have access to an online directory of worldwide members through the Member Gateway. Have you lost track of a colleague who has moved away? Looking to contact someone in a specific organization? Find them here!

• **Member Discounts:** As an AFP member, you're eligible for discounts on books through the AFP Bookstore, one of the largest offerings of specialized books on fundraising, volunteerism and philanthropy.

• **Compensation & Benefits Study:** This is a comprehensive overview of how different positions within fundraising are compensated. [Click here for the latest review of Canadian fundraising salaries!](#)

• **And More!** Watch for the winter edition of On Target (the last edition of this special anniversary year!) where we'll summarize all the resources just waiting for you!



News Briefs

LOCAL AND REGIONAL NEWS

• **EVERY MEMBER CAMPAIGN NEEDS YOUR HELP:** The Every Member Campaign is a Canada-wide campaign but did you know that AFP Ottawa has its own local goal toward the campaign? Your donation will help provide resources and advance philanthropy from coast to coast... and right here at home. If we achieve our local goal, AFP Ottawa can receive a grant of 25% of chapter donations – to be used right in our own community. [Please click here to give generously.](#) Volunteers are also needed – contact [Jannine Atkinson](#) for more info.

• **LOOKING FOR LEADERSHIP EXPERIENCE?:** If you would like to gain experience in a leadership level volunteer position (approx 5 to 10 hours per month), and if you have strong communications, writing, team building and project management skills, we would like to hear from you. Please contact [Kim Strydonck](#), by the end of September, at 819-776-8640 or [by email](#)

PUBLIC POLICY & LEGISLATION

• **PROPOSED CAP ON CHARITY SALARIES:** Bill C-470 aims to put a cap on the salary of anyone who works for a charity, in any position. According to the Mississauga Liberal MP who proposed the bill, this is in the interest of donors and tax payers who often have no direct say on how their money is spent. [Click here to learn more about the proposed bill.](#) Find out AFP's stance by [clicking here.](#)

• **FIND OUT HOW THE HST WILL AFFECT YOUR CHARITY:** Consult the CRA's webcast about the application of GST/HST to charities (you'll find a host of other helpful topics here too). [Just click here to get the full scoop.](#)

• **PROHIBITIVE ONLINE DONATION TRANSACTION FEES:** AFP is working with Imagine Canada to investigate transaction fees linked to online donations, as they are sometimes prohibitive to non-profit organizations. Stay tuned for more info!

• **PARLIAMENT CONSIDERS BILL TO PERMANENTLY RECOGNIZE NATIONAL PHILANTHROPY DAY:** Last fall, Canada became the first country to officially recognize National Philanthropy Day since its creation in 1986. Since then, Senator Terry Mercer, CFRE introduced Bill S-203, which would permanently recognize November 15th as National Philanthropy Day. Over the summer, this bill has been heard in committee and reported back to Senate, where it awaits 3rd reading. [Click here to find out more.](#)

CAREER ADVANCEMENT OPPORTUNITIES

• **CFRE STUDY GROUP TO START THIS FALL:** Preparing for CFRE designation takes focus, time and discipline. Joining a CFRE Study group provides the support to accomplish this. An AFP Ottawa CFRE study group will start this fall. If you're interested in participating as a CFRE candidate or if you want to volunteer to mentor candidates, please contact AFP Ottawa Chair of Advancement Paul Chesser, CFRE at (613) 520-2600, ext. 3638 or [click here to email him.](#)

• **CANADIAN GRADUATE DEGREE IN PHILANTHROPY:** Work by a task force continues to establish a Masters degree in philanthropy at a Canadian university. As mentioned in the summer 2010 newsletter, a number of universities had been invited to indicate their interest, including Carleton in Ottawa. As of early September 2010, the group is now working with two universities to assist them in moving forward. We are unable to name the universities at this point. A national update is expected this fall.

News Briefs Continued on page 6...

Parting Quote...

*It is not because
things are difficult
that we do not dare,
it is because
we do not dare
that things are
difficult.*

- Seneca,
Roman Philosopher,
Mid-1st century AD

AFP Ottawa Community Relations & Communications Committee

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

News Briefs (Continued from page 5)

● **AFP 48TH INTERNATIONAL CONFERENCE – SAVE THE DATE:** Get ready! Something new will be blowing into Chicago in March 2011—a fundraising conference like you’ve never experienced before! Mark your calendars: March 20–23, 2011, Chicago, Ill. [Click here to access all the details as they become available.](#)

● **NEW FREE WEBSITE PORTAL AVAILABLE TO HELP WITH NON-PROFIT GOVERNANCE:** If you’re involved in overseeing Board and committee governance at your organization, a free online resource is available to help manage risk, liability and compliance with legislation. [Click here to find out more and register.](#)

RESEARCH AND TRENDS

● **WHERE CANADIAN PHILANTHROPY IS HEADED:** Over 15,000 donors across North America, including over 7,000 Canadians, took part in the Cygnus Donor Survey 2010. The survey, by Penelope Burk, uncovers what donors had to say about their recent giving experiences and longer term intentions, what could influence them to be more generous this year than they had planned, and their comments on a broad range of issues that affect their philanthropy. This survey touches on all areas of fundraising. [Click here to download the Canadian edition of the Cygnus Donor Survey \(download of executive summary is free until September 20\).](#)

● **CANADIAN SPONSORSHIP LANDSCAPE STUDY FINDS THAT SPONSORSHIP SURVIVED THE RECESSION:** According to the leaders of the fourth annual Canadian Sponsorship Landscape Study, although sponsorship increased more slowly in 2009 than in previous years, the total estimated spend was still \$1.43 billion – an increase of 2.9% from 2008. Activation spending also increased from 71 cents on the dollar spent on sponsorship to 76 cents on the dollar. [Click here for more details.](#)

● **THE STATISTICS OF ONLINE FUNDRAISING APPEALS:** According to the 2010 eNonprofit Benchmarks Study by M+R Strategic Services and NTEN Nonprofit Technology Network, the average open rate on email fundraising appeals is 12.82%, the click thru rate is 0.78% and the conversion rate is 0.13%. That means that if you send an email solicitation to 10,000 people, you can expect that 1,282 will open it, 78 will click through to the donation page and 13 will make a contribution. The study found that the average one-time online donation size was \$81.33. [Click here to download the study results.](#)

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

Enfin, envoyez-leur des photos du projet qu’ils financent accompagnés d’une petite anecdote sur l’incidence positive de leur soutien. Profitez-en pour vous assurer qu’ils ont le nom et le numéro de téléphone d’une personne avec qui ils peuvent communiquer en tout temps s’ils ont des questions ou des préoccupations.

Faites preuve de respect, de transparence et de sincérité, et vos relations avec vos donateurs se porteront à merveille – que vous les ayez rencontrés en personne ou non!

Envoyez vos questions dites philanthropiques à jothurlbeck@rogers.com. Indiquez « Demandez à Leah » dans l’objet.