



# On Target

AFP OTTAWA CHAPTER

Summer 2011

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### Best Practices in our Community: Lessons Learned at the AFP Ottawa Fundraising Day 2011

By Margaux Smith as modified by Ipshi Kamal

Thanks to Good Works' sponsorship, I attended this year's AFP Ottawa Fundraising Day on May 3rd. For new fundraisers like myself, this type of experience is incredibly valuable. I was able to attend informative lectures and had the opportunity to network and make connections with other industry professionals. The day was full of learnings and inspiration for me and I've provided some highlights below.



Margaux Smith

**Why fundraisers do what they do?** Ray Zahab was the opening plenary. Hearing him talk felt like having someone reach inside me, grab my soul, and shake it up. Ray talked about his transformation from being a heavy smoker and couch potato to an ultra marathoner who has run in remote areas all across the world. Among his many impressive feats, he ran across the entire Sahara Desert in 111 days! Soon after altering his lifestyle Ray started a charity called impossible2Possible (i2P). i2P encourages youth to reach beyond their perceived limits and uses adventure as a medium to educate, inspire, and empower our global community to make positive change in the world.

While fundraisers like talking about numbers and best practices, sometimes we need to be reminded of what really inspires us to do our work—stories. Moving stories of inspiring people who are changing our world for the better. Ray provided exactly that!

**Ask your donors for feedback. And listen!** After shedding a few tears, I rushed off to hear Jon Duschinsky speak. I loved Jon's emphasis on the importance of truly listening. He said charities need to be more proactive: we should ask people what they need and provide that instead of helping people the way we think they should be helped. Can this principle not be applied to donors as well? We assume we know how our donors want to be communicated with, thanked, and recognized but very few charities have asked donors for their preferences or advice, and probably fewer have actually listened.

**We aren't competing;** we are working together to advance philanthropy. Michael Allen, President and CEO of United Way Ottawa, was the plenary following lunch. I fully agreed with his statement that we are not competing for the same donor base. There are millions of potential donors out there! Instead of narrowing our sights, let's get more creative, figure out how to appeal to those donors, and grow the donor base for all of us.

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Stay tuned to the AFP Ottawa website for exciting new education session and events in fall 2011!

Know a rising star who could benefit from a seasoned mentor?

Tell them about the AFP Mentorship Program.

Contact us or download the application form off the AFP Ottawa website today!



**Member Spotlight:**  
**Linda Eagen, MBA**  
**President & CEO, Ottawa Regional Cancer Foundation**  
**And recipient of the 2011 AFP Ottawa**  
**Outstanding Fundraising Executive Award**

by Kim Strydonck, CFRE

**What do you most enjoy about fundraising?** I love finding out what people are passionate about and what they want to accomplish. It's exciting to find a fit that we all want to contribute to. And I enjoy the 'ask', because you want people to share in your own passion and commitment.

**What do you consider the greatest challenge confronting fundraisers today?** I think it's managing workload. We try to do more with less in this sector. You get wrapped up in the passion and vision and want to see it through ... and more often than not you are doing it on a shoestring budget. It goes along with setting realistic objectives and investing the right resources.

**What is the best career advice you ever received?** My dad said, "Find a job you love and you'll be happy." I certainly took that advice to heart. I have a job that I love, and one that allows me to work alongside an amazing group of dynamic individuals who are all working to make this community a better place.

**In your opinion, what is the one most important skill or trait that a fundraiser can have?** Perseverance. That's probably the most important skill.

**What is your motto?** It's more an affirmation than a motto: "Show me a day when the world wasn't new." It reminds me that whatever happened yesterday, it's in the past and today is a fresh start.

**What do you enjoy doing when you're not working?** Being outdoors: Camping, sitting by a fire, hiking. During our camping trips my husband and I call each other Huck and Finn. I plan to do the Kilimanjaro climb in January.



Linda Eagen, MBA

**Best Practices in Our Community (Continued from page 1)**

**Keep in touch with your donors, old and new.** I attended the Médecins Sans Frontières (MSF) session on integrated campaigns. Here are some noteworthy points I jotted down during the talk:

- They are one of the only charities that explain the difference between restricted and unrestricted funds to their donors—and it pays off!
- E-mail is a great way to drive traffic to your website.
- The more touch points you have, the better you can measure.
- After Haiti, they appealed to the 22,600 emergency first gift donors. They got a 6% conversion rate (that's 1,174 new donors) to monthly giving! They also got an additional 200 second gifts. Don't ignore your emergency first time donors!

**Appeal to your donors' hearts**

I finished off the day with one of my favourite presenters, Good Works' own Fraser Green. Fraser is a powerful speaker and always masterfully appeals to his listeners' emotions. And he advised that fundraisers should do the same. The best way to really communicate a message is to appeal to our donors' hearts and souls, and not just their heads.

All in all, AFP Fundraising Day 2011 was a truly memorable, informative, and inspiring day.

**Click to read the original story by Margaux Smith**



### Create Sector Advocates Through Education:

Education is a core function of AFP and it's at the heart of an ethical fundraising practice. Our cornerstone is the AFP Code of Ethical Principles and Standards – a code governing over 30,000 professionals worldwide. AFP is at the forefront in providing education to volunteer and professional fundraisers, who benefit from access to practical knowledge that enhances their skills and abilities. Bringing ethical practice to life is a key role of AFP in Canada. Almost daily, new strategic issues arise and AFP needs the capacity to respond and educate. Increasingly, issues of regulation and public policy relating to fundraising are dominating the public discourse about philanthropy. Those engaged in raising philanthropic support require background knowledge and practical tips for addressing these complex issues.

Last year, in Ottawa, many of our members and "future members" took advantage of a wide array of learning sessions, webinars as well as an information packed Fundraising Day. By supporting the AFP Foundation for Philanthropy – Canada, you are supporting educational opportunities that would not otherwise be available, locally and nationally. **Please give generously. Donations can be made on line** or by calling Jannine Atkinson, EMC Chair at 613-562-5800 ext 6649

## "Ask Leah"

By Leah Eustace, CFRE



Leah Eustace, CFRE  
President, AFP Ottawa

### How can I promote the idea of planned giving to my donors?

I've been privileged to moderate many donor focus groups around the concept of planned giving and I've learned some important things. First, donors really dislike the terms "planned" and "legacy" giving. Instead, call these gifts what they are: donations through a will; gifts of life insurance, etc. Second, donors already know how to make these gifts: what they want to hear from you is why they should make one to your organization. In other words, focus on inspiring your donors.

In terms of marketing, take a soft approach. For example, include tick boxes on coupons, mention planned giving on your website, and profile a bequest donor in your newsletter (the vast majority of planned gifts are in the form of bequests). Even better, consider sending out a special mailing to donors that tells the story of someone who has left a bequest in his/her will to your organization. Have them talk about why they're passionate about your cause, what motivated them to include it in their will, how they were able to include a bequest while also taking care of their family's needs, and why other donors should consider doing the same. Ideally, send this mailing out to donors who have been giving for a number of years and who are 65 or older: they're your true target audience. Include a reply device that allows them to ask for more information, or to let you know if they've already left you a bequest.

Good luck!

Please send your fundraising questions to [jothurlbeck@rogers.com](mailto:jothurlbeck@rogers.com), with the subject line "Ask Leah."

## « Demandez à Leah »

Par Leah Eustace, CFRE

### Comment puis-je promouvoir les dons planifiés auprès de mes donateurs?

J'ai eu le privilège d'animer différents groupes de discussion de donateurs sur le thème des dons planifiés. J'y ai appris plusieurs faits importants. D'abord, les donateurs n'apprécient vraiment pas les expressions « dons planifiés » et « dons patrimoniaux ». Ils préfèrent les expressions plus descriptives telles que « dons par testament », « dons par assurance-vie », etc. Par ailleurs, les donateurs savent déjà comment faire de tels dons. Ce qu'ils veulent réellement savoir est, pourquoi ils devraient faire un tel don, à votre organisme. Autrement dit, tentez d'inspirer vos donateurs.

En ce qui a trait au marketing, adoptez une approche douce. Par exemple, ajoutez des cases à cocher sur des coupons, mentionnez les dons planifiés sur votre site internet, et présentez le profil d'un donateur qui a fait un legs à votre organisme dans votre bulletin d'information (la grande majorité des dons planifiés sont des legs).

Suite à la page 6

Le comité des communications de l'association des professionnelles en philanthropie section Ottawa est à la recherche d'une personne dite intéressée à donner un coup de main pour son site Internet et pour d'autres communications auprès de ses membres. Nous lançons l'invitation à nos collègues francophones, votre engagement est important.....! [afpcommunications@hotmail.com](mailto:afpcommunications@hotmail.com)

Looking for qualified staff?

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

**Advertise with AFP Ottawa!**

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

Call (613)590-1412 for more details.

\* \$175 for members

\*\$275 for future members

**AFP Ottawa wishes you a great summer!**

« Demandez à Leah » continuez

Encore mieux, faites parvenir un envoi spécial à vos donateurs dans lequel vous racontez l'histoire d'une personne qui a inscrit un legs à votre organisme dans son testament. Demandez à cette personne d'expliquer pourquoi votre cause lui tient à cœur, ce qui l'a incitée à vous inclure dans son testament, comment elle a réussi à inclure un legs tout en s'assurant de répondre aux besoins de sa famille, et pourquoi d'autres donateurs devraient penser à faire de même. Idéalement, vous devriez envoyer ce document aux donateurs de 65 ans et plus qui font des dons à votre organisme depuis plusieurs années. Ce sont eux qui constituent votre principal public cible. Pensez à inclure un formulaire de réponse dans cet envoi afin de leur permettre de demander de plus amples renseignements ou de vous aviser s'ils ont déjà inscrit un legs à votre organisme dans leur testament.

Bonne chance!

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

## News Briefs

### LOCAL AND REGIONAL NEWS

- **INTRODUCING AFP MOBILE!** Together, Kaptivate and AFP have created **AFP Mobile**, the streamlined, smartphone-compatible mobile version of [afpnet.org](http://afpnet.org). AFP Mobile provides members with the most important information distilled from AFP's website, including member news, Twitter and fundraising blog feeds, the latest jobs postings, the AFP meetings and events calendar, chapter information, and more. In addition, **AFP Mobile** will soon feature full donation functionality to allow contributions to AFP.
- **STANDARD FOR REGISTERED CHARITIES: The Bureau de normalisation du Québec (BNQ)** recently launched an interesting initiative concerning the governance and good management practices of charities. Through this initiative, a proposed standard for charities to adhere to voluntarily has been established. Visit the BNQ Web site to read about the standard. The document is subject to public consultation and the BNQ welcomes your comments
- **THE AFP ETHICS ASSESSMENT INVENTORY™ (EAI) IS COMING SOON!** In July AFP will launch its first ethics assessment tool, the AFP Ethics Assessment Inventory™ (EAI), which will be available online for voluntary use. It allows participants to confidentially compare themselves with peers who belong to AFP. Intended as a developmental tool, the EAI will help fundraising practitioners and organizations assess and strengthen the ethical dimensions of their practice. Fundraisers can examine the alignment among their personal ethical performance, that of the organizations in which they work and that of their peers within AFP. Watch for this great tool coming soon!

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## Leadership Opportunities: A Benefit of AFP Membership

### Calling senior level AFP members:

Are you looking for ways to be more involved?

When you were first starting out, did AFP help you and now you want to pay it forward?

AFP Ottawa has leadership opportunities that might be just right for you!

- Mentor someone just starting out in fundraising.
- Help to guide a professional pursuing his or her CFRE.
- Do you have expertise on a certain topic? Ask about presenting at an educational session.

### Calling all AFP members:

Everyone can be a leader in their own way. As a volunteer-based organization, AFP could benefit from your help on a committee, giving you extra experience, CFRE points and networking opportunities!

We look forward to hearing from you.

[jothurlbeck@rogers.com](mailto:jothurlbeck@rogers.com)  
613-590-1412

Please Note: If you are interested in one of the above opportunities, an AFP Ottawa representative will work with you to ensure the right fit and to maximize your impact with respect to your available time. Some opportunities may be available immediately; others with a delay.

News Briefs continued from page 4

## LOCAL AND REGIONAL NEWS

### • **GOLDMAIL: A GREAT NEW FUNDRAISING AND COMMUNICATIONS RESOURCE FROM AFP FREE TO MEMBERS**

GoldMail messages are powerful and easily customized to your organization's needs, using compelling photos, graphics, facts and quotes that you choose to help reinforce your message. They are very easy to create and would be great for your messages to your donors. AFP individual members may use GoldMail for a year at no charge. After one year, the yearly fee of the program for AFP members is only \$75. To learn how GoldMail can help you better communicate to your donors, please visit the AFP/GoldMail web pages, complete with registration form and examples. [www.goldmail.com/afpmember](http://www.goldmail.com/afpmember)

• **WELCOME:** 25 people have joined as new AFP Ottawa members between January and June 2011, and one person has re-joined our ranks after having been with another chapter for a while. Welcome to all of you and we look forward to helping you make the most of your membership! To see who these people are, visit [www.afpottawa.ca](http://www.afpottawa.ca) and scroll down to the 'Welcome and Congrats' box.

• **MILESTONE ANNIVERSARIES:** 13 AFP Ottawa members are celebrating 15 or more years as a member of AFP. Another 10 are marking their 10th anniversary in 2011. And nine more have been with us for 5 years. To see who these people are, who are so committed to the profession, visit [www.afpottawa.ca](http://www.afpottawa.ca) and scroll down to the 'Welcome and Congrats' box

• **SPECIAL REQUEST TO MEMBERS:** Please help us to serve you better by updating your profile on AFP's online database. The more we know about you and your charity, the more we can provide programming that will meet your needs. **Please click here to get started** and sign in with your unique password and username. Scroll down to 'Member Profile Links' and choose 'Demographics.' Please note that the question about dollars raised refers to fundraising dollars. The question about operating budget refers to that of your entire organization or, if you're in a foundation then it refers to the organization that your foundation supports. The question about your expense budget refers to that of the fundraising program/foundation. If you have any questions, please **email Kim Strydonck, Membership Chair**, for assistance. Thank you.

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## JOIN THE CONVERSATION ONLINE:

Connect with your AFP Ottawa colleagues by joining **AFP Ottawa Chapter's new group on LinkedIn**. The group provides a forum for discussion and for posting links to articles of interest.

AFP Ottawa Chapter can also be found on **Twitter** and **Facebook**.

## Parting Quote...

“Don't be afraid to give your best to what seemingly are small jobs. Every time you conquer one it makes you that much stronger. If you do the little jobs well, the big ones will tend to take care of themselves.”  
- William Patten

### AFP Ottawa Community Relations & Communications Committee

Gerry Backs, MA, CFRE  
Kelly Ducharme  
Ipshi Kamal  
Kim Strydonck, CFRE  
Benoit Brunet  
Leah Eustace, CFRE

[Click here for details on the AFP Ottawa Chapter Board](#)

- **NETWORKING OPPORTUNITY:** The AFP Membership Committee has several volunteer positions open that would allow you to network with fundraising professionals at all levels, as well as to help with membership marketing. Please consider joining us! [Contact Kim Strydonck](#) for more info.

### PUBLIC POLICY & LEGISLATION

- **BILL S-203 (NATIONAL PHILANTHROPY DAY) AND BILL C-470:** The dissolution of Parliament terminated bills that had not received Royal Assent meaning that these bills are not reinstated when Parliament reconvenes. Instead, the bills must be reintroduced as completely new bills.
- **BILL S-201, NATIONAL PHILANTHROPY DAY** has been reintroduced in the Senate by Senator Mercer.
- **ADVOCACY ONLINE** has changed their name to **“Engaging Networks”**. The name change reflects their expanded services since their establishment in 2000. Service will include contacting the AFP's members list when an opportunities arise such as Bill S-201, National Philanthropy Day.

### CAREER ADVANCEMENT OPPORTUNITIES

- **THE NONPROFIT MANAGEMENT INSTITUTE 2011: PARTNERING FOR IMPACT** This year's Nonprofit Management Institute, happening Sept. 27-28 at Stanford University, has developed a 2011 program under the broad umbrella “Partnering for Impact.” You'll learn how to improve your communication and persuasion skills, build the right funding model, increase youth volunteerism, effectively track performance and more. [Click here to learn more!](#)

### RESEARCH AND TRENDS

- **Would you like to know how you can use Social Media in your organization?** Learn more about social media from a social media master. The online video provides a basic introduction to Social Media including the various social networking sites such as Facebook, Twitter and LinkedIn. [Watch the free video on line: Social Media 101:](#)
- **A Canadian Way of Giving: Special Insert on Philanthropy in The Globe and Mail:** New research reveals that Canadian philanthropy has greater depth than previously understood. For charitable organizations, this knowledge represents an opportunity to connect with donors and volunteers in a newly personal way. [View and download the insert.](#)