

# On Target

AFP OTTAWA CHAPTER

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For information please contact:

**Joanne Thurlbeck**  
**Administrative Coordinator**  
**AFP, Ottawa Chapter**  
**6026 Vineyard Drive**  
**Ottawa, ON K1C 2M5**

Tel: (613) 590-1412

Fax: (613) 590-1413

Email:

[jothurlbeck@rogers.com](mailto:jothurlbeck@rogers.com)

Web:

[www.afpottawa.ca](http://www.afpottawa.ca)

[Click here for a list of AFP Ottawa Board members](#)

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### Best Practices in our Community:

## Making Campaigns Count

By Kim Strydonck, CFRE  
with John Ouellette, CFRE

John Ouellette knows a thing or two about campaigns.

John received the Fundraising Executive of the Year Award at the 2008 Philanthropy Awards, and is the Executive Vice-President of Philanthropy at the Ottawa Regional Cancer Foundation. He is in the midst of his fourth capital campaign.

"Obviously the fundraising is key, but the benefits go beyond the dollar impact," says John, as he describes the many ways in which campaigns help charities. "The Courage Campaign has brought many other benefits to the Cancer Foundation, apart from raising millions of dollars for the expansion of cancer services in our city."

Engaging senior level volunteers, spreading the word about your charity and the work it does, and elevating donors to greater gift amounts all have a positive effect, long after the campaign finishes. "Getting that stretch gift confirmed has helped us move \$500/year donors to \$5,000 or \$10,000 multi-year pledges," John enthuses. "We're developing strategies, including strong stewardship and involvement, to maintain these donors at upper levels."

Yet, along with all the advantages of a campaign comes hard work. The decision to embark on a campaign should be well-considered. And once that decision is made, you need to set your strategy.

John is happy to share tips he has learned over the years:

**Size doesn't matter:** "I'd encourage any size charity to establish a campaign, whether it is capital or not. No matter how small or large your charity, you can – with some creativity and discipline – develop your case, set aside some time each week, build your prospect lists, engage a few volunteers and make your calls."

**Avoid silos:** "I suggest that charities not limit themselves to the traditional bricks and mortar campaigns. Allow yourself the opportunity to adapt to a wider range of donor wishes and donor interests. Building your capacity... building your people... those are as valuable as a new wing or a new structure. Donors will understand if you tell your story well," John confirms.

**Be comprehensive:** "Capital campaigns have evolved over the past decade, toward 'comprehensive campaigns.' The traditional campaign model provides a clear division between annual giving and capital gifts, at least in the donor's mind: 'Continue to give my \$200 a year, but also make a special gift of \$5,000 for the new widget building.' A comprehensive campaign can get donors thinking of the larger amounts, and we then try to maintain that level longer term when possible. Another key factor is that many major donors prefer giving to projects or to support people, not just buildings."

**Consultants have a role at the beginning:** Consultants have experience, focus and discipline that can assist charities. John believes, however, that "most charities are moving away from in-house counsel, in favour of a more flexible strategic counsel model."

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*Innovative fundraising techniques...*

*The latest trends...*

*Networking opportunities...*

**Get it all at AFP Ottawa educational sessions and events!**

**Stay tuned to [www.afpottawa.ca](http://www.afpottawa.ca) and your email in-box for news about 2009 opportunities.**

### Member Spotlight:

## Monique Archambault,

Legacy Giving Manager, Ottawa Humane Society

By Dawn Cooper

### How did your fundraising career begin?

After graduating with a business degree from the University of Ottawa, I worked in Conventions & Catering at the University, which of course involved special events. From there I went on to different positions in several organizations, all of which I enjoyed!



### What personal or professional experience best prepared you for your role?

I really enjoy being with, and working with, people. Fundraising is all about building relationships with people.

### What advice can you offer to new fundraisers?

Today, fundraising is very specialized. I would encourage newbies to experience all the different areas of fundraising, from special event organizing to corporate giving, major gifts, planned giving and everything in between. It is a very rewarding career!

### What do you most enjoy doing when you're not working?

I love to travel.

## "Ask Eric"

By Eric Dean, FAHP, CFRE  
with Kim Strydonck, CFRE



Eric Dean, FAHP, CFRE  
AFP Ottawa President

### How can charities best work with donors during difficult economic times?

Historically, charitable giving has remained strong in times of economic downturn. While the *rate* of growth of charitable giving may decrease, people do continue to support their trusted charities. Charities that develop a sense of trust among donors will be most successful. You may benefit from the following ideas:

- Continue to engage in fundraising, diversifying with annual, major and planned giving programs for individuals, companies and foundations.
- Increase relationship cultivation efforts.
- Look for ways to help donors honour their philanthropic objectives, in ways that are tax wise and appropriate to their situation. Help donors to focus their giving in the ways that align with their interests and to have the biggest impact. Options may include gifts through installments. Arranging a bequest won't impact the donor's lifestyle, yet it will have an important impact. Look to the AFP and other groups for ideas.
- Realize and respect that some donors, who truly care about your charity's work, will choose to delay giving. Stay in touch with these people. You want to ensure that they will return to you when they can.

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

**LIRE CET ARTICLE EN FRANÇAIS À LA PAGE 5.**

## MARK YOUR CALENDAR!

AFP Ottawa  
Fundraising Day

May 6, 2009

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

**Leadership, leadership, leadership:** How to choose your volunteer cabinet? John emphasizes 3 words: "leadership, leadership, leadership". "If I had to add two more words: influence and affluence. Make sure that most of your key cabinet members are really engaged and take the time to ensure roles and responsibilities are clear. Do you want them to identify potential donors, to open doors, to actually solicit the gifts, either with or without your help? Taking the time, early on, to clarify these points will make it easier to follow-up with your cabinet down the road."

**Set targets, make them measurable and make yourself accountable:** "Fundraising is a unique field but many best practices can be borrowed from sales and from business," John says. "Cold calling, project management, meeting with people face to face — every week and every day. Those habits are sometimes hard to instill when we're juggling 4 or 5 projects at once but once they are in place, and with personal discipline, they are an excellent indication of future success."

"My belief is that when people care deeply about your cause, that you thank and steward well, that you are transparent in your reporting, many will choose to make longer-term stretch gifts... but you need to make sure they feel that it has impact and it's valued," John emphasizes.

With colleagues like John in our midst, who are willing to share their expertise, many charities will be a step closer to meeting their campaign goals.

**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](mailto:jothurlbeck@rogers.com).**

### How AFP Ottawa Serves You:

## A Word from Your Chair of the Every Member Campaign

By Marie Lizotte, CFRE  
with Michelle Schafer

As Chair of the Every Member Campaign (EMC), my mandate is to encourage all AFP Ottawa members to support the Campaign with a personal contribution.

What is the EMC? It's a giving opportunity that funds scholarships, bursaries and other initiatives for AFP members and non-members. This is especially meaningful to fundraisers who work for charities that are not able to subsidize their membership fees or attendance at AFP events. Your donation goes to the AFP Foundation in Canada, contributing to the overall professionalism of fundraising across Canada by providing educational opportunities to fundraising professionals in need.



In October 2008, AFP launched a new "ePhilanthropy" service to support the EMC. This service provides links to Facebook and allows donors to engage their colleagues, friends and family in the Campaign. Please give today via the AFP website and encourage your friends and family to do the same by providing a link to our online donation page.

As for me, I have been a member of the AFP since the late 90's and served on the Toronto AFP Board in 2002-2003. Through AFP, I have been privileged to meet genuinely committed individuals who make a difference every day in the charities they serve. Please feel free to contact me – I welcome all comments!

Marie Lizotte, CFRE  
Lizotte-Widyaratne Consulting Services  
Phone: 613-228-8023 Email: [malizo@rogers.com](mailto:malizo@rogers.com)

HAPPY NEW YEAR

From  
AFP Ottawa

We look forward to  
seeing you in 2009!

## News Briefs

### LOCAL NEWS

● **CELEBRATING PHILANTHROPY:**

The National Capital Region celebrated giving individuals and groups at the 14th annual Philanthropy Awards ceremony on November 12th. Award recipients were Dan Greenberg, Mark Sutcliffe, the Volunteers' Circle of the National Gallery of Canada, Breanna Pizzuto, TD Bank Financial Group, and John Ouellette. Thank you to all of our sponsors. Click here to find out all about it.

● **MAKE YOUR DONATION - EVERY MEMBER CAMPAIGN:**

Make a general donation, or one in honour or in memory of someone you know. Your gift provides scholarships and bursaries to fundraisers, assists chapters in delivering the Essentials of Fundraising series, supports the National Career Mentoring Program, helps complete the Cost of Fundraising Study, and ensures materials are available in both official languages. Donate online in French or English by clicking here.

● **VOLUNTEER OPPORTUNITIES FOR FUNDRAISERS ABROAD:** *Leave for Change* is a volunteer sending program that enables employees to transform their annual leave into a 2 or 3 week volunteer assignment in a developing country and to contribute to an international development project. Click here to read an AFP Ottawa member's experience and to find out about opportunities.

### NATIONAL NEWS

● **NEW RESOURCES FOR FRANCOPHONE FUNDRAISERS:** The AFP Foundation for Philanthropy-Canada has translated the Ready Reference booklets *Building an Effective Board of Directors* and *Bringing a Development Director on Board*.

● **SMALL AND RURAL CHARITIES:** In October 2007, the CRA launched a series of consultations with small and rural charities to better understand their unique service needs and compliance challenges. The consultations led to the development of a joint action plan. Click here to read the joint action plan and timelines for each recommendation.

● **DISBURSEMENT QUOTA NEWS:** Under the *Income Tax Act*, all charities are subject to rules requiring certain expenditures on program activities. One of these rules now requires charities to spend 3.5% of the value of all of their property not used directly in charitable activities or administration. This rule formerly applied only to those charities that were 'foundations'. As of 2009, it will apply to all charities, with one exception. Click here to find out more.

### CAREER ADVANCEMENT OPPORTUNITIES

● **GET JAZZED FOR NEW ORLEANS!** Register today for the AFP's 46th International Conference on Fundraising. Get jazzed for a great event and the biggest of the year! Join us in New Orleans March 29 through April 1, 2009. Click here to register and learn more.

### AFP MEMBERSHIP DUES INCREASE

In order to continue to develop and enhance benefits and services for members, there will be a dues increase of \$30 for members in the Active and Associate categories. This change will bring total annual dues for those categories to \$250, plus chapter dues, and will be effective April 1, 2009.

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## Parting Quote...

*When we recognize that a better word for fundraising is "friend raising," we open limitless doors to creativity in support of our causes.*

-- Sue Vineyard,  
author and consultant

### AFP Ottawa Community Relations & Communications Committee

Kim Strydonck, CFRE  
Benoit Brunet  
Dawn Cooper  
Michelle Schafer

**Join our committee –**  
Meet new people Add to your  
experience  
Gain CFRE points!  
afpcommunications@hotmail.com

## RESEARCH AND TRENDS

- **WEALTHY DONORS SHARE MOTIVES AND MISGIVINGS:** Wealthy donors want to give, but they don't want to gamble, according to a new report from the University of Pennsylvania's Center for High Impact Philanthropy. The study offers candid responses about the information donors want and what keeps them from getting it. [Click here for details.](#)
- **THE ART OF SETTING AND CHANGING GIVING LEVELS:** It seems easy on the surface — set up a series of donation amounts and develop a plan for recognizing donors as they reach each level. However, adding to or changing giving levels can be dangerous terrain if you don't do your homework. [Click here to learn more.](#)
- **CHARITABLE GIVING OF CANADA'S LARGEST CORPORATIONS:** A new research study from Imagine Canada finds that many of Canada's largest corporations have moved beyond "cheque book philanthropy" and are leveraging their assets in more ways than the public, or even the charities and nonprofits they support, might think. [Click here for details.](#)

## « Demandez à Eric »

Par Eric Dean, FAHP, CFRE  
avec Kim Strydonck, CFRE et Benoit Brunet



Eric Dean, FAHP, CFRE  
Président de l'AFP d'Ottawa

### Comment s'y prendre pour que les œuvres de charité fonctionnent le mieux possible en temps économiquement difficiles ?

Historiquement, les dons de charité n'ont pas fléchi en période de ralentissement économique. Le *taux* de croissance des dons de charité peut diminuer, mais les gens continuent à appuyer leurs organismes de bienfaisance de confiance. Les organismes de bienfaisance qui créent un sentiment de confiance chez les donateurs auront le plus de succès. Voici quelques conseils pratiques :

- Continuez de vous engager dans la collecte de fonds en diversifiant les différents programmes tels les programmes annuels, majeurs et planifiés pour les individus, les compagnies et les fondations.
- Augmentez vos efforts pour cultiver les relations existantes avec vos partenaires et vos donateurs.
- Cherchez des moyens d'aider les donateurs à atteindre leurs objectifs philanthropiques de façons qui soient judicieuses financièrement et appropriées à leur situation. Aidez les donateurs à aligner leurs dons selon leurs intérêts et dans les domaines où ils auront le plus grand impact. Proposez, entre autres options, un don par versements échelonnés. Planifier un legs testamentaire ne nuira pas au style de vie du donateur, mais aura une grande portée philanthropique. Consultez l'AFP et d'autres groupes professionnels pour avoir plus d'idées.
- Reconnaissez et respectez le fait que certains bienfaiteurs qui ont votre cause à cœur choisiront de retarder leur don. Demeurez en contact avec ces personnes afin de vous assurer qu'elles reviendront vers vous quand elles le pourront.

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