

Power of Philanthropy: Ignite Your Mission Conference April 2, 2009



POWER
of Philanthropy
LRFRE, CAGP and Pillar
2009 CONFERENCE

SPEAKERS & TOPICS

Morning Plenary – 8:00 a.m.

Dr. David Posen

Stress Mastery: You Have More Control Than You Think

In recent times, stress has gone from being a fact of life to becoming a way of life. People are feeling a loss of balance and control. In this lively and entertaining presentation, David Posen will discuss practical and realistic ways of reducing stress by taking more control of our lives. Covering topics from E-mail to multitasking, from sleep to leisure, David will provide fieldtested strategies for stress mastery and show us that we have more control than we think.

DR. DAVID POSEN, a former family physician from Oakville, Ontario, is one of Canada's leading authorities in stress mastery, change management and work-life balance. Since 1985, Dr. Posen has devoted his time exclusively to stress management, lifestyle counseling and psychotherapy. A sought-after speaker for professional groups across North America, his recent clients include Warner Brothers, Verizon, American Express, University of Toronto, Pfizer, and RIM.

He is the author of three best-selling books, *Always Change a Losing Game*, *Staying Afloat When the Water Gets Rough* and, most recently, *The Little Book of Stress Relief*, now in its ninth printing and translated into five languages. Dr. Posen has appeared on TV and radio across Canada and has been quoted in many leading U.S. and Canadian magazines such as *Canadian Living*, *Redbook*, *Cosmopolitan*, *McCall's*, *Men's Health* and *USA Weekend*.

Married with two children, Dr. Posen leads a busy schedule of seeing patients, writing and public speaking. He is an avid reader, golfer and musician, currently playing trombone in the Oakville Wind Orchestra and the Milton Concert Band.

Session 1 – 9:15 a.m.

A - Power of Stewardship

Holly Benson, Fundraising Consultant

Keeping and fostering today's donors is your surest way to guarantee a robust fundraising future. Learn how strategic stewardship [often the most neglected part of the donor cycle] may be the best commitment your organization can make this year. Beyond recognition and benefits, you'll learn: what does individual stewardship really mean, why do the best stewardship moves cost little or no money and what do donors really want from their charities? This fast-paced session provides an introduction and refresher to the concept and practice of strategic individual stewardship and offers great take-away, "Monday-ready" ideas, based on actual examples.

HOLLY BENSON has more than 25 years of senior experience in advancement. She has served a number of leading organizations in an executive capacity, including the University of Toronto, the Living Arts Centre and the Toronto Symphony Orchestra. As the TSO's Vice President of Development, she helped develop a significant Major Gift programme that secured historic levels of transformative gifts for the TSO.

She has led capital, endowment, annual, equipment and special campaigns on a local, provincial and national level. Holly taught Major & Planned Gifts at Humber Institute and is an acclaimed speaker, workshop leader, presenter and panelist. Now as a consultant, she helps a select portfolio of clients advance their fundraising capacity, primarily by providing Boards, staff and volunteers with Major Gifts and Campaign counsel that is both practical and applicable. Member, Association of Fundraising Professionals [Toronto Chapter].

B - Technology and Philanthropy - Giving 2.0

**Victor Harris, Manager of Business Development
Echidna Solutions Corp**

Technology is changing the way we work, live and give. Echidna Solutions Corp. is excited to offer advice that will help non-profits promote their message in the online world. The Internet offers many new resources for fund development and awareness.

Learn to optimize your online presence and create a dual level marketing campaign that utilizes technology in tandem with your offline marketing initiatives. Learn how to make your message stand out through effective use of Search Engine Marketing, Social Networking and effective website creation and promotion.

VICTOR HARRIS is the Manager of Business Development at Echidna Solutions Corp. Echidna has been helping clients enhance their online presence since 2002. Formally trained in Marketing, Victor applies and adjusts marketing techniques to the online medium. By unlocking the mystery of the web, your organization will learn how to rank higher in search

engines, drive traffic to your site and create a user friendly experience. This will keep your supporters engaged and educated about your cause and organization.

C - Prospect Research in Fundraising & Volunteer Development

**Tracey Church, Manager, Prospect Research
CNIB, National Office**

Discover what prospect research can do for your fundraising shop and volunteer recruitment efforts. From small nonprofits to large, this workshop will cover research techniques, resources (free and subscription) and networking to find foundation, corporate and individual donors for your organization. Tracey will highlight the importance of board and volunteer activities in promotion and recruitment of major giving donors and future board members. In addition “where” research fits within the cultivation activities at your organization is discussed. This session is open to all members of your development team to better understand how to best utilize the research component within your organization.

TRACEY CHURCH is the Manager, Prospect Research for CNIB, National Office. Prior to CNIB, Tracey was the Prospect Researcher for 5 years at London Health Sciences Foundation. A researcher for 20 years, Tracey is a graduate of the Master in Library & Information Science program from The University of Western Ontario and recently received her Professional Certificate in Not-for-Profit Management. Tracey is part-time faculty at Western teaching the Prospect Research course in the MLIS program. She is a regular presenter at conferences for APRA (Association for Professional Researchers in Advancement), AHP, and AFP and is currently on the APRA-Canada board.

Session 2 – 10:45 a.m.

A - Fundraising in the Age of Innovation

**Sharon Avery, VP, Development and Regional Operations
UNICEF Canada**

Whether you're in a small shop or an organization with extensive resources, fundraisers today are feeling the pressure to bring creative ideas and new thinking to the table. The never ending question of "how do we raise more?" is leading some charities to explore innovation practices in the corporate world. But where does an organization begin?

Great innovation begins with deep research and a clear framework. This workshop will attempt to define innovation in the not-for-profit sector. We'll take a snapshot of the Canadian market, exploring demographic trends and key market insights. Finally we'll discuss the discipline behind R&D and explore a well tested corporate new product development framework.

SHARON AVERY has been in the not-for-profit sector for 15 years, working with the Tim Horton Children's Foundation, Save the Children Canada, SickKids Foundation and now Unicef Canada. A degree in Radio & Television Arts from Ryerson University would seem to be an unlikely path to fundraising – but the communications & marketing skills she gained in that program have been priceless. Through her 9 years at SickKids, Sharon has managed media relationships, community events, and corporate partnerships and is now the Senior Director, Innovation. She spends her days helping colleagues unleash purposeful creativity against strategic business opportunities. She is responsible for creating structure and process to support both how the organization comes up with bold new ideas and how to create a culture of innovation.

B - 2009 CRA Update for the Charitable Sector

**John Craven, FCA, Vice-President of Development Support
St Joseph's Health Care Foundation of London**

Several topics will be covered in this session including:

- CRA guidelines on fundraising expenses
- CRA latest updates on the charitable sector
- CRA views on tax shelters
- Receipting do's and don'ts, including split receipting
- CRA audits
- Disbursement Quota – will the recession impact this requirement?

JOHN CRAVEN is an FCA with over 20 years of experience in senior finance roles with London Life and Canada Trust. He has also served on boards and committees for several London area not-for-profit organizations. His professional contributions include serving on the Accounting Standards Board from 1999-2004. This is the body that designs Canada's Generally Accepted Accounting Principles. He currently is on this Board's Not-for-Profit Advisory Committee. John

also is a regular presenter for the London United Way's series of seminars designed for Board members from not-for-profit organizations. John is currently the Vice-President of Development Support for St Joseph's Health Care Foundation of London, responsible for all financial matters, investments, human resources, technology and privacy.

C - The Case for Support: *From Vision to Reality*

Gina Eisler, MA, CFRE

Every nonprofit must take their "menu" of needs and craft the tool fundraisers rely on to seek volunteer, staff & donor support. From the annual campaign through legacy initiatives– the case is more than just a pretty brochure. This hands-on case workshop will cover the steps of the case writing process from material collection, interviewing the experts, writing and using the case (including donor recognition opportunities). Starting with the basics of hunting and gathering, we'll identify the key steps, discuss interview questions for program leaders, and ultimately – move the boxes of paper from resource document to proposal.

GINA EISLER started her development career in 1988 and has worked with several non-profit sectors including social services, religion, healthcare, arts and education. Her experience includes planned giving, major gifts, campaigns, annual appeals, special events and public relations. Gina frequently speaks at fundraising conferences and teaches development program seminars. She has been the Canadian Faculty Chair of the AHP Primer since 2006 and she has won five national fundraising awards. Gina recently finished her Masters in Philanthropy and Development at Saint Mary's University of Minnesota. Her thesis was entitled, "Donors Without Borders: The Globalization of Philanthropy."

Lunch Keynote – 12 Noon

Frank O'Dea From the Bowery to the Boardroom

FRANK O'DEA is a wonderful speaker who inspires and motivates his audiences wherever he speaks. His presentation is a highlight of any event. Whether it is his *Hope Vision Action* motivational talk, or his *Spirit of an Entrepreneur* talk or his *Move to Good Governance* presentation, Frank never fails to engage his audiences.

As a founder of the *Second Cup*, he has instant credibility because anyone who has ever had a cup of coffee or tea in this country knows that company. This represents an instant connection with the audiences.

When his listeners hear that he had been living on the streets only a few years before, and that he also went on to found other businesses and charitable foundations, they want to know his "secret of success".

This story of triumph over adversity is a genuine local Canadian success story that people are thrilled to be associated with. Event organizers find that a presentation by Frank O'Dea is a high point because he delivers a message that motivates and empowers his audiences.

Session 3 – 1:30 p.m.

A – Bequests: Avoiding Legal and Ethical Challenges

**Robin-Lee Norris, Partner
Miller Thomson LLP**

This workshop, focused on Wills and Estates, will take the audience through the process of clients planning a charitable gift in their will with their legal advisor to the beneficiary stage, notifications, follow through tips, releases, will contests, use of proper legal name, different types of bequests, restricted gifts, will kits, holograph wills, validity of a will, multiple wills and capacity issues. With 90% of Planned Giving programs built on charitable bequests – soliciting them, stewarding them and ultimately benefiting from them for the greater good – this session will be attractive to professionals at an intermediate and introductory level. Join Robin-Lee for an in-depth look at the nitty-gritty of bequests, the advantages and disadvantages of bequests, and for some tips and tools on avoiding the ethical and legal challenges to keep your charitable giving program viable.

ROBIN-LEE NORRIS is a leader in the Guelph business community as a senior partner at Miller Thomson LLP and has recently been named an Honorary Fellow of the University of Guelph, February 2009. She received the Mayor's Award for Volunteerism in 2007. Robin-Lee has supported community organizations and institutions in establishing their Planned Giving programs and marketing the program to advisors. She brings her considerable talent and energy to causes that span all aspects of community life - business, educational, social, cultural and athletic. Robin-Lee is active in the Guelph community and sits on various boards and committees, including the Board of Trustees for the University of Guelph. She received her education from University of Guelph (B.A.) and Osgoode Hall Law School, York University (LL.B.) and was called to the Ontario Bar in 1982.

B - Proactive Relationship Building and the Integrated Approach

**Hallie McClelland, Director, Gift Planning
The University of Western Ontario**

In this session you will learn to identify potential donors for major and legacy gifts from your annual fund and other data lists; learn proactive fundraising techniques; and how to present multiple funding options to the donor enabling you to acquire both current and future funds for your organization.

HALLIE MCCLELLAND has been in the not-for-profit sector for 15 years and her work accomplishments include the three tenets of individual donor fundraising. Hallie began her career in annual giving at Ontario March of Dimes and worked with major gift and in particular planned gift fundraising at World Wildlife Fund Canada and the University of Toronto. Hallie has been the Director, Gift Planning at The University of Western Ontario since 2003.

C - Volunteer Management 101

**Lorraine McGrattan, Manager of Volunteer Resources
Hamilton Health Sciences**

At this workshop you will learn the fundamentals of managing volunteers. The session will cover topics such as program assessment, recruitment, interviewing, screening, placement, orientation, training, evaluation and recognition. Group discussion will be encouraged to share resources and ideas for gift planners. Attendees are always encouraged to bring examples, stories, resources for the good of the group and the presenter will ensure the session is enjoyable and beneficial to all.

LORRAINE MCGRATTAN is Manager of Volunteer Resources at Hamilton Health Sciences (HHS) and has been with the organization for 25 years. She manages 10 staff at the five site organization and works with approximately 1500 volunteers. Lorraine is Past President of Hamilton Administrators of Volunteers (HAV) and currently Vice President of the Professional Administrators of Volunteer Resources of Ontario (PAVR-O), where she is also certified. She is a graduate of the Mohawk College Volunteer Management Program where she taught level 2 as well and is a graduate of the Bay Area Leadership Program.

Session 4 – 3:00 p.m.

A - Exceptional Events Built by Exceptional Leaders

**Mandi Fields, Owner
Intuition Retreat and Event Planning**

Exceptional events can raise money and awareness, promote partnerships, educate the community and celebrate your organization. But exceptional events need exceptional leaders.

Along with event fundamentals including feasibility, budget, critical path, and roles and responsibilities, this session will provide you and your organization with expert advice on how to effectively manage your events and cultivate your donors.

Once we've assessed your fundamentals and motivation for hosting an exceptional event we will examine the roles your supporters and champions play in the events' success and potential for growth.

Bring your questions, ideas and events, as this session also includes an opportunity for discussion and expert analysis.

Intuition Retreat and Event Planning specializes in the creative development and execution of fundraisers and large scale events. Intuition owner, **MANDI FIELDS**, began her career as a palliative care worker at the local AIDS hospice and witnessed the decline in deaths once ARV's was introduced in 1997. In 2003 she turned her efforts to supporting the Stephen Lewis Foundation; enraged by the lack of HIV treatment reaching Africa. Profiled in Business London Magazine in 2006, Mandi Fields has also been nominated for the Women of Distinction Award. Currently on contract with CTVglobemedia working locally as the Community Relations Coordinator for A London/Windsor/Wingham, Mandi is thriving and learning the complex relationship of sponsorships and media and how this relates to events.

B - Building Your Planned Giving Program: The Essentials

**Jill Nelson, CFRE, Director of Planned Giving
The Princess Margaret Hospital Foundation**

In the current economic climate, Boards and senior management are paying more attention to Planned Giving and the rewards of gift planning programs. However, they may have unrealistic expectations of what Planned Giving can do for an organization, and how quickly revenue will increase. Jill will share her perspective on what's new, what's old, and what still works in Planned Giving today. You will leave with a clear understanding about the essentials and key elements to implementing a successful program and concrete ideas you can put to work right away.

JILL NELSON is currently Director of Planned Giving at The Princess Margaret Hospital Foundation. She has over 17 years of fundraising experience, including 10 years as Director of

Development of the Canadian Paraplegic Association Ontario and four years at the Canadian Cancer Society (Ontario Division) where she was Director of Planned Giving. She was Vice Chair, Chair and Past Chair of the Toronto RoundTable of the Canadian Association of Gift Planners and is currently the CAGP-ACPDPTM's representative on the CFRE International Advisory Council. She is a frequent speaker at Planned Giving industry conferences.

C- How to Keep One Step Ahead of Your High-Powered Volunteer

**Janet Tufts, Executive Director
The Canadian Medical Hall of Fame**

Have you found yourself in the enviable position of recruiting high-powered volunteers only to find out that they have no time for your organization? The dollars that you were counting on them bringing in are a forgotten dream. Perhaps it's time to face the realities of dealing with senior-level fundraising volunteers. Is it about lowering your expectations or figuring out how to keep one step ahead of them? In this workshop you will learn first how to 'snag' the right volunteers and then how best to ensure you continue to get the most out of what they have to offer.

In her role as Executive Director, **JANET TUFTS** has positioned The Canadian Medical Hall of Fame for growth and sustainability through her ability to engage stakeholders nationwide. Prior to this, Janet was a communication consultant at St. Joseph's Health Care London providing support to the mental health leadership team. Janet has twenty years of experience in the non-profit, public and private sectors. Her work in resource development, community development and communications has taken organizations to new heights. Janet is a qualified teacher currently providing instruction at Continuing Studies at Western. An active community volunteer, Janet is the board chair of Hope's Garden and a board member of the Rotary Club of London.