

Report on the Community Foundations of Canada Conference, Sheraton Wall Centre, Vancouver

2011 May 11 to 14

J. Barnard

2011 May 11 Wednesday

Registered and connected with Kim Bater. I left him my card.

Because our foundation had an expressed interest in community housing I signed up for the Mole Hill affordable housing tour on The Friday afternoon Community Learning Forum.

I attended the afternoon “Links” workshop given by Norma Cameron of The Narrative Company, “Telling Your Organizational Story”

She stressed the importance of getting, not only your story out there, but your community’s story. She believes that the story is more important than confronting people. In fact, in fundraising, telling the story is more important than “the ask”. She called this “Narrative Philanthropy” and feels that community foundations are “light-footed” on the creative part of philanthropy.

When you confront people about gift planning the first question they ask themselves is “who is this person?” She illustrated how you tell who you are with stories using examples from her childhood in Ravens Craig, an industrial area of Glasgow and from work with the mothers of young offenders. She asserts that donor developed legacies are actually people writing their life’s last chapter, which is to be told after they are gone. It is the “testament” in last will and testament, the part that lawyers don’t write anymore.

Good storytelling is the relating of good impact stories on how your foundation is impacting your community. Fundraising is the inspiration business and however we try to elevate it, it is little more than storytelling. You have to take people somewhere magical first. You need to ask their permission first and give a time limit.

The opposite of narrative philanthropy she says is “venture philanthropy”. She summarized the differences as follows:

<u>VENTURE</u>	<u>NARRATIVE</u>
Giving from the head	Giving from the heart
Quantitative	Qualitative
Statistics	Stories
Measurable outcomes	Unpredictable outcomes
Financial investment	Emotional investment

She noted that, with the advent of social media, the outreach is greater than ever. There is a need to concentrate on the message and “walk the walk”. Also she noted that perception is reality, which reminded me of Mau’s suggestion that the LdB&DCF was viewed locally as more like a secret society.

The bones of a good story are:

1. Scene, time and location
2. Characters with names
3. Plot with challenges and opportunities
4. Conclusions

Good ideas from this workshop:

- Include a tea bag with a mail out of stories. (Have a cup of tea and read this story) No need to include a call to action
- Appoint a story keeper. Need to preserve stories and conduct a story audit.
- Endowment book of Life (Jewish Foundation of Manitoba). Stories about why people established funds.

Final Word from Norma Cameron:

“YOU HAVE NO BUSINESS ASKING PEOPLE TO OPEN THEIR WALLETS WITHOUT FIRST OPENING THEIR HEARTS AND MINDS”

2011 May 12, Thursday AM

I tried to attend Session A5 – Bringing Business to the Table. Unfortunately there were three round 7-tables in small conference room. (i.e. seating for about 21) with hundreds trying to get inside, so I attended Session A2 – Next generation leaders in the Workplace. This session’s presenters were:

- Lynne Toupin – HR Council for the Non-Profit Sector
- Justin Ho – United Community Services Co-op
- Martin Garber-Conrad, Edmonton Community Foundation

This session seemed to be about the trials of working in the non-profit sector and in some ways was more oriented to large foundations (a recurring theme for the 3 days I attended). In fact, I got the impression that the big city foundations don’t fundraise much. They simply scramble to get the grants out. It appeared to me that the Vancouver Foundation had an army working for it. Nevertheless there were some facts and stats given in this session which I found interesting and potentially useful.

1.2 M people work in the not-for-profit sector in Canada, more than the number working in the forestry and oil and gas sectors combined. The complaint is that the non-profits are providing free training for corporations and governments because they are forced to keep wages and overheads low. Garber-

Conrad asked for a show of hands on how many non-profits present touted their percentage returned to recipients vs. how many touted their pension plan for staffers. We all know how that vote went.

They noted the present Canadian work force demographic breakdown:

- Boomers 34%
- Gen X 18%
- Gen Y 26%

Gen Y prefers to work in the public sector because of benefits, defined benefit pensions, job mobility and continued learning. In the Gen X view their primary influences are time, experience, openness and transparency. The Boomer view is that there is a leadership deficit and it's always looming. Note that there are already more Gen Ys in the workforce than Gen Xs.

Relevant to us in Lac du Bonnet from this is what was said about boards, their recruitment and their successions. Most boards are white, male and clearly middle class with no diversity in social strata.

Good Ideas from this Session:

- In recruiting Board members look for:
 - Young people trying to build a resume
 - Young people trying to earn high school credits for community work
 - The Class Presidents
- Your webpage should link to every one of your corporate partners including corporate partners who have donated in kind.
- Vital signs report should be on hand for corporate donors

2011 May 12 Thursday PM

In the afternoon I attended session B2 – With a Little Help from my Friends by Kerry Longpré of the Calgary Foundation and Christi Cruz of TELLUS.

Their theme was about partnerships and the power of community/corporate alliances. They feel that CFs have the kind of proactive visions and connections to the community that corporations interested in charitable investing need to get value for their philanthropic dollar. The assets they bring are:

- Vital Signs
- Expectation of Leadership

This is the only session I attended that actually said anything about small communities. They thought that the small community foundations could foster closer connections with their communities.

They also felt that foundations should strive to be transformational rather than transactional. Foundations are in a position to “connect the dots for corporations” because they see both the needs

and the donors. Foundations need to identify and take inventory of their potential community partners. Corporations want to know where their assets will be best leveraged. Corporate partners should be involved in vital signs discussion. If not, how would we know if their view of what are the “key issues” are really “key”.

Good Ideas from this Session:

- Use social media for you promotion. One example was the Breast Cancer drive where everyone was urged to turn their Facebook page pink.
- Involve corporate partners in Vital Signs

2011 May 13, Friday AM

I attended Direct from Donors SessionC4. It was a panel interview of three donors by Bibi Patel of the CF of Ottawa. The donors were:

- Cornelia Duck
- Lucy Hensel
- David Sweanor

All three were major donors to the Ottawa Foundation. Hensal made the point that many large donors wish to stay anonymous but as their donations grow and have effect they have a harder and harder time remaining that way. Large donations usually mean directed funds because large donors want to see their money directed to areas they are passionate about. They acknowledged that foundations undoubtedly spent more time focused on their largest donors.

What should foundations do to not jeopardize relationships with donors?

- Keep doing what got them the donation in the first place
- Supply feedback
- Be tactful
- Build trust. Interpersonal relations are important. For some complete transparency is important.

Sweanor (a tobacco litigation lawyer)listed what he didn't like:

- Job protectors
- Rent seekers
- Ego
- Listing of all the conference attendees

Donors understand and acknowledge that sometimes there isn't a payoff. The Gates foundation has spent 25M\$ on homelessness in California and admit that they haven't made any difference.

Parting words: "MANAGING DONORS IS LIKE HERDING CATS".

Good ideas from the session:

- Donors learning forums organized and presented by foundations
- David Sweanor's dislikes.

Plenary Sessions:

The Vancouver Foundation displayed its vast resources by bringing in top speakers for the plenary sessions. Please note that I say this in the best sense since it was my understanding that they were able to get Bill Clinton via long standing relations with the Mott Foundation of Flint Michigan so resources doesn't mean just money.

The Governor General was very inspirational, again using stories from the Mennonite communities around Kitchener-Waterloo. One of his best stories was about Walter Annenberg who donated hundreds of millions to philanthropic projects and Miss Alva Eddie who donated her life savings of \$35,000 to the U of Mississippi receiving honorary degrees together at Harvard.

Naomi Tutu, daughter of Desmond Tutu spoke on the theme "In times of crisis the wise build bridges and the foolish build dams."

Bill Clinton spoke strongly in favour of social investing. This was a big theme in the conference and the principal topic of the plenary panel session.

The most impressive speaker of conference was Janice Abbott of an organization called Atira. In the early '90s she was operating a shelter for abused women. It operated on shoestring funding from donations and government. The government money was about as reliable as donor money. She felt she needed to build a for-profit company to a) employ some of the women many of whom had significant skills and b) fund the shelter. She chose property management because they were already managing the shelter building and there was a whole range of skills required from financial to organizational to unskilled labour.

She started off by incorporating and offering out their services for building management and maintenance. Some of the profits were turned back into the business and actual properties were acquired to rent. This required establishment of a corporate partnership in the banking sector. Atira's partner in this was the Van City Credit Union. Their growth was fueled not only by property purchase but also company purchases and mergers. Atira is one of the largest property management companies in the Lower Mainland. Of course their corporate partner receives incredible mileage from this relationship.

Best Idea from the Plenaries:

- Foundations owning for-profit companies. This could be a way to obtain for senior's housing in Lac du Bonnet

Other bright ideas picked up at the conference:

- Sign coming into town
- Promote other forms of giving to raise your profile.

Overall Impressions and Final Thoughts:

This was a very well planned, informative and effective conference that conveyed the Community Foundation message to CF members as well as the outside world. Naturally the opportunity to exchange information with other CF Board and member personnel was invaluable. The enthusiasm is high. Vancouver is a beautiful city and the Vancouver Foundation was a very gracious hosts. There was a lot to do and there was a lot to learn and in that regards it was too tightly scripted at some points, i.e. washroom breaks are appreciated.

Most valuable for me was to meet and talk to CF members from recent startups and small foundations. My interaction with Bob Murdoch of the Trehern Foundation was particularly interesting because he is on the National Board and he noticed and remarked on something I noticed immediately. Small foundation issues are under represented at the national level. Moreover, I felt an undercurrent of opinion at the CFC that the small foundations are "clutter" and ineffective and should be banding together into larger organizations that would be more effective. I believe that the CFC may believe that this arises from a local centeredness and selfishness that "what's ours is ours" and "it's my community first".

After thinking about this for awhile, I can't entirely disagree. On the other hand, when you think of the dynamics, particularly on the prairies, you will notice that rural communities are desperately trying to reverse depopulating trends and reinvent themselves so that vanishing communities not only offer the opportunities but also the amenities and assets that for the past 50 years have been attracting their youth to the large cities. This is a cross roads by crossroads fight all across central Canada, and I daresay, the United States. I personally don't have the energy to meet regionally on a monthly basis. Anyone that has been on regional committees know what efforts are required just in driving alone.

Bob will be raising the issue of programs for small CFs at the national Board this year. There was one session that was supposed to be for small foundations. The presenter's idea of "small" was 6M\$. Incidentally you'd be surprised at what foundations are small and recent. For example Peterborough ON Foundation is 2 years old and less than 1M\$. Ft .Mac has no foundation and some of the smaller foundations are found in the oil patch because the workforce is so transient.

Finally of 177 foundations in Canada, about 47 are in Manitoba. Manitoba was by far the best represented province at the conference. The story about William Forbes Alloway's initial donation of

\$100,000 in 1921 and the “widow’s mite” contribution of a \$5 golf piece seemed to be related over and over again at the conference. The conference two years from now will be in held in Winnipeg.