



AFP CALGARY & AREA CHAPTER

# the pipeline



ADVANCING PHILANTHROPY THROUGH EDUCATION, TRAINING AND ADVOCACY

SPRING ISSUE 2016, VOL. 3 ISSUE 1

## Calgary Chapter Celebrates

By Derek D. Fraser, CFRE, 20th Anniversary Chair

In 2016, the Calgary & Area Chapter celebrates 20 years of growth and advancing philanthropy in southern Alberta. This year we will be offering a glimpse of the history of our Chapter and those that have made the Chapter what it is today. Our Chapter is a well-respected and often called-on Chapter that has placed its members in some of the highest offices within AFP in Canada and internationally. To have Andrea McManus, CFRE, be the first non-American Chair of the AFP International Board is an amazing accomplishment and will set our Chapter apart from all the other Canadian Chapters for years to come.

The Calgary & Area Chapter has enjoyed many accolades over the years and this has thrust the Chapter onto the national and international stage. Over the years the Chapter has earned Ten Star status as well as once being recognized recently as a Ten Star Gold Chapter, the highest honour a chapter can receive. The Chapter also consistently earns Annual Fund recognition in the 250-400 sized chapter division for leadership in most funds raised, highest participation and also Highest Chapter Impact Gift. These are accomplishments our members can be very proud of, as our Chapter has been very consistent in reaching our annual goals and often surpassing them. This is a Chapter win that all members can feel proud of.

Our Chapter been recognized for communications excellence and with member retention success. AFP Calgary & Area is a Chapter leader in so many ways that we have “calved” two new chapters – Southern Alberta and Central Alberta. We have lost members due to the creation of the two new chapters, but we have extended the reach of AFP from the south of the province through the middle to our colleagues in Edmonton. AFP is now represented in the largest urban centres in the province, which makes it accessible for more organizations to consider a membership for their fund development team.

The AFP Calgary & Area Chapter is a leader in testing new activities and events to stretch the capacity of its members and to serve the Calgary non-profit community. AFP Calgary is deep with experience and practitioners who are leaders within their own organizations as well as in the broader community. The strength of our Chapter has always been in the leadership who steps-up to take us to the next level.



Over this celebratory year, read about our Chapter's history and you will be proud of your colleagues who have worked hard to enhance the reputation of the fundraising profession in southern Alberta.

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## How Did AFP Calgary Begin? The Public Demand for Accountability

By Brian Duclos, CFRE, Past President 1999-2000  
& founding member of AFP Calgary & Area Chapter



AFP Calgary & Area Chapter has had an impressive history of achievement over its 20 years since its establishment, but how did it all begin?

*With apologies for exact dates and names, the author will rely heavily on recollections of the catalytic events that occurred that called us to action and led to the creation of what would become the Association of Fundraising Professionals Calgary & Area Chapter.*

The situation was ripe in the final years of the 20th century in Calgary to form up. Sporadic meetings had been taking place in our community in the 1990s whereas interested fundraisers were feeling each other out to determine “whom” we were and if there was interest in associating. Questions like, “Would it be safe to get together and share our practices with other “competitors” in the business?” “How many of us are there?” “What would be the mandate of such an organization?” and “What’s in it for me/my employer?” may have been in the air.

A couple of significant developments occurred that triggered our Chapter’s creation and made these questions moot. Indeed, we were propelled forward to create an organization for fundraisers in our community.

There was an establishing meeting that took place at the Southern Alberta Institute of Technology’s Penthouse and it was this moment in time that started it all. Elaine Proulx hosted the meeting. An interview she heard on CBC Radio the day before had riled her so much, she had called everyone on her rolodex. The room was full to capacity — on the order of 18-20 people attended. Leaders in the charitable community from the arts, health agencies, education and social agencies were there.

A little background to provide context: a scandal concerning a Calgary non-profit was on the front pages of the city’s papers. In short, a non-profit agency’s Executive Director had unilaterally taken funds from its operations and sent them to a fraudulent, off-shore operator. The ED was drawn to the promise of “beyond belief” returns on her investment that, in turn, would help her organization achieve its goals. It turned out to be a scam and the organization was facing intense media scrutiny and was on the verge of closing its doors. At the root of it all was the issue of the misuse of charitable donations.

It was this CBC interview concerning this scandal that had set Ms. Proulx off on the road to action. A so-called, “highly qualified representative from the non-profit sector” was being interviewed; she

had nothing nice to say about professional fundraisers and the rules under which they operated. The interviewer probed for answers as to how a situation like this could happen. The “expert” was a trained lawyer and was the CEO of a Calgary-based consulting firm, assisting non-profits in starting up/stabilizing their operations. The expert operated a *percentage-based* fundraising business. She appeared to be highly credible.

Regardless of the content of the interview, a number of future founders of AFP asked themselves, “How is this person empowered to speak for us?” At the SAIT meeting, the situation was put on the table. There was unanimous consent that we, in the profession, must lead with appropriate messaging within the community about the way in which non-profits and professional fundraisers operate. “We” needed to be identified as the spokes agency and to speak for ourselves. However, by whom and how would we be empowered? Likely you can see where this is going.

Ms. Proulx was prepared to lead a team to form up and ultimately represent the sector in the community with the goal of instilling trust in and awareness of sector practices. At the meeting, she learned that another, Dree Thomson, had already begun the process of developing such an organization. Ms. Proulx was pleased to learn this and deferred to Ms. Thomson, who would go on to become the President of Calgary’s first association of fundraising professionals.

Public outrage about this case would eventually place the issue on the laps of politicians in Edmonton whose solution was the development of legislation: the Alberta Fund-Raising Act. It was clear from the white paper that the fundraising profession was not well understood, or liked. Punitive restrictions/penalties proposed within

the legislation required, for example, that all professional fundraisers would have to post a \$25,000 cash bond with the government before commencing with any fundraising activities.

The proposed Act caused immediate and intense activity by a formative group of professionals in the community. Notably, Nancy Palmer and Stu Reid would lead a two-person charge, backed by our local board (all founders of the now AFP Calgary & Area Chapter) to lobby and inform government of the realities of fundraising in Alberta and North America. Alberta fundraisers now operate (or should be operating) under this legislation today. It was as a direct result of AFP Calgary & Area’s formation and the fact that we had a *Code of Ethics and Standard of Practices* that the Act passed, de-barbed of many of its most punitive and ill-advised sections.

*Rest assured, there will be more particulars about our very exciting and eventful roots in coming articles, leading up to our 20th Anniversary. Suffice to say, we owe a great deal to the early volunteers who put us on the map and to those who continue to lead the Calgary AFP Chapter.*

To quote Edmund Burke,  
**“Those who don’t know history are doomed to repeat it.” Perhaps more optimistically, we would be well advised to know our past, to honour where we have come from and to build on the shoulders of those who have come before us. AFP Calgary is committed to researching and developing our Chapter’s roots and sharing the story with our members. We trust you approve.**



## MEMBER PROFILE – 20<sup>TH</sup> ANNIVERSARY

# Val Hoey



**“There are few people in this world who define the word ‘professionalism’ as well as Val Hoey. She truly is the consummate professional in every sense of the word, and an excellent role model for the fund development profession.”**

Guy Mallabone, MA, CFRE, President & CEO at Global Philanthropic Canada Inc.

*Note: To celebrate AFP Calgary & Area’s 20<sup>th</sup> anniversary as a Chapter this year, we’ll be profiling a long-term member in each issue of The Pipeline this year. We’re proud to kick things off with Val Hoey, CFRE, who’s currently on the search for new and interesting opportunities after a 30-year career in fundraising, including the last 14 years as Associate Vice-President of College Advancement at Bow Valley College.*

*Q: Val, you’ve had a long and impressive career. What do you like most about being a fundraiser?*

“That is an interesting question, the challenge will be in how to distill the many aspects that for me make the profession of fundraising meaningful. I suspect I would land on two elements, firstly the people you meet and secondly the opportunity the profession provides by allowing you to buy mission which ultimately enriches community.”

*Q: What has been the biggest change you’ve seen in the profession over the decades?*

“Again an interesting question. Technology, I believe has brought the profession and the professionals within the sector closer together providing collaborative opportunities across geographic boundaries instantly. The profession itself has continued to adapt in a meaningful and significant way which is reflective of the individuals within the sector who bring their experience, professionalism and

intellectual capacity to a profession that is quite truly on the cutting edge of society. There is a level of sophistication that has evolved over the years reflected through the training programs and tools that are designed and delivered locally, nationally and internationally by members of the profession complimented with opportunities to pursue undergraduate or graduate degrees in the discipline of Philanthropy.”

*Q: Is there a story or experience that stands out for you as particularly meaningful or memorable? Why?*

“For me it was the moment that I realized that fundraising was not solely about asking for money, that it was about an exchange of ideas, of values, of facilitating meaningful conversations that would create a better world. This was a pivotal moment of understanding that allowed me to build my career on building relationships that would ultimately buy more mission while also creating life-long relationships for the organizations that I represented.”

*Q: You’ve been a member of AFP for many years. What has membership in AFP meant to you, professionally and personally?*

“I wish I had been a member of AFP Calgary when it began two decades ago. I was, however, one of the founding members of AFP Edmonton and then had the honour of being involved in AFP Calgary when I moved here 14 years ago. I would say membership in AFP has been

critical in my career. It provided me with the opportunity to meet and collaborate with exceptional professionals in Canada and across the world. AFP brings together the best that the sector has to offer both in the opportunity to advance one’s career and at the same time continue to personally grow in the knowledge of your profession. It provides a platform where individuals can be stimulated, challenged and continually grow in their knowledge while creating an opportunity to volunteer locally at their own chapter. One could say Membership is the first step towards Mentorship in AFP.”

*Q: What advice would you give more junior members who aspire to a career in fundraising like yours?*

“Like any career, it is a professional journey and learning does not stop when you leave college or university and have finally landed that dream job. I would encourage junior members to embrace their life-long learning in the field of Philanthropy by engaging in meaningful conversations with other professionals, by always having one book on the go that they will learn from, by volunteering on a committee with AFP and by trusting their instincts when opportunities are placed in front of them but most of all I would encourage them to always start each day with the thought of “how can I make things better today?”

CHANGE THE WORLD WITH A GIVING HEART



## National Philanthropy Day®



Philanthropy Awareness Week & National Philanthropy Day® 2016

# Celebrating 20 years of Philanthropy

By Sharon deBoer, Co-Chair, Philanthropy Awareness Week and National Philanthropy Day®, AFP Calgary & Area Board of Directors

2016 is truly a year of celebration; not only will we celebrate and recognize some of Calgary's outstanding philanthropic leaders, we will also celebrate the 20<sup>th</sup> anniversary of Philanthropy Awareness Week and National Philanthropy Day® in Calgary this November.



Sharon deBoer, CFRE, Co-Chair, NPD 2016

you for making this 20-year tradition a reality.

Calgary is a city rich in generosity and community builders and it is our privilege to recognize seven of these individuals and companies each year through the Generosity of Spirit™ Awards. In addition to these seven awards, we recognize

Activities throughout the Philanthropy Awareness Week are lead by a dedicated team of volunteers. Vincent Duckworth and I (2016 Co-Chairs) wish to thank our talented and passionate committee of volunteers who give of their time and talent to make Philanthropy Awareness Week and National Philanthropy Day® a success. If you are interested in being part of this fantastic committee, please contact the AFP office – we promise you will not regret it!

We are humbled and blessed by the numerous corporate partners who support Philanthropy Awareness Week every year. We have all seen corporate Calgary provide support to our community and even during challenging times, they continue to step up. Thank

three professionals who are making outstanding contributions to our profession and the community with the Hazel Gillespie Community Investment Leadership Award, the Outstanding New Fundraising Professional, and the Outstanding Fundraising Professional Awards.

Bob Marley said, "The greatness of man is not in how much wealth he acquires, but in his integrity and his ability to affect those around him positively." I think perhaps Mr. Marley was thinking about us when he wrote that quote. As we celebrate 20 years, let's all reflect on how much has been achieved and how Calgary is a better place.

We look forward to celebrating the last 20 years of philanthropy with all of you.

Bob Marley said,

**"The greatness of man is not in how much wealth he acquires, but in his integrity and his ability to affect those around him positively."**

### NPD Steering Committee 2016

If you wish to join this energetic team, please contact Stephanie McWilliam at 403-297-1033 or email her at [afp@telus.net](mailto:afp@telus.net).

**Sharon deBoer**, CFRE, Co-Chair, NPD 2016

**Vincent Duckworth**, CFRE, Co-Chair, NPD 2016

**Kathy Greenwood**, Chair, Professionals Forum

**Bethany Ross**, CFRE, Chair, Sponsorship

**Gisele Bouchard**, GOS Committee

**Bobbi Turko**, Chair, GOS Committee

**Daniel Lombardi**, Chair, Marketing Communications

**Donna Vecino**, Event Planning & Logistics

**Niesa Silzer**, Event Planning & Logistics

**Sheliza Kassam**, Co-chair, Youth Forum

**Paul Hong**, Co-chair, Youth Forum

**Stephanie McWilliam**, AFP Calgary & Area

### Mark Your Calendars!

With stellar support from our NPD committees, the dates are now set for AFP Calgary and Area's Philanthropy Awareness Week 2016. Please mark these key days on your calendar:

#### National Philanthropy Day®

**Professionals Forum:** Tues., November 8 at Hotel Blackfoot

#### Generosity of Spirit™ Reception:

Wed., November 9 at Odd Fellows Building

#### National Philanthropy Day® Luncheon –

Tues., November 15, 2016 at BMO Centre



# Call for Nominations

## Professional Awards

AFP Calgary & Area Chapter joins with the Hazel Gillespie Community Investment Leadership Committee to launch nominations for the Professional Awards that recognize leaders in the philanthropic, non-profit sector and the Community Investment professionals who support their programs. Recipients of these awards are honoured during Philanthropy Awareness Week for their contributions, leadership and mentorship.

AFP Calgary & Area chapter recognizes fundraising professionals for their contribution to the fundraising profession. Nominations for the Outstanding Fundraising Professional and Outstanding New Fundraising Professional will be accepted beginning April 15.

These awards celebrate and honour fundraising professionals who have made significant contributions to the growth and development of their profession. **Participate in honouring your colleagues by nominating a deserving professional by June 13.** Nomination forms, along with award criteria, can be found at: <http://afpcalgary.afpnet.org/files/AFP%20Chapters/CN6/Outstanding%20Fundraising%20Professional%202016%20Nomination%20Form.pdf>



Hazel Gillespie

## Hazel Gillespie Community Investment Leadership Award

The Hazel Gillespie Community Investment (CI) Leadership Award recognizes a community investment professional who exemplifies the best practices of the profession by demonstrating:

- leadership (within a corporation; the profession and the non-profit community),

- dedication to the ideals and practices of the profession, and
- mentorship of fellow community investment professionals, whether new or peers, to partner organizations or to corporate colleagues who seek to understand the profession.

Individuals are encouraged to nominate a CI professional known for his or her generous professional leadership, strategic thinking and insight and for having a genuine commitment to continuous learning and the mentorship of others.

This award was created in recognition of the extraordinary contribution made by Hazel Gillespie to the creation and development of the community investment profession. It is intended to inspire and encourage those working in the profession of community investment to become strong leaders and superb community investment practitioners.

### For Award guidelines and nomination forms, visit

[www.hazelaward.com](http://www.hazelaward.com) or <http://afpcalgary.afpnet.org/files/AFP%20Chapters/CN6/2016%20Hazel%20Nomination%20Form.docx>

## Generosity of Spirit™ Awards



Nominations now closed.

AFP Calgary and Area Chapter recognizes the many individuals, families, youth, groups and businesses who demonstrate the spirit of philanthropy through outstanding contributions of time, talent, leadership and financial support. The Generosity of Spirit™ Awards provide the opportunity to recognize and celebrate these philanthropic leaders who make such a difference in our community. Nominations for 2016 GOS awards for Corporate Philanthropist, Small Business Philanthropist, Philanthropic Group, The Doc Seaman Individual Philanthropist, Youth Philanthropist, Philanthropic Family, and Lifetime Achievement Philanthropist closed on April 29. Thank you for your submissions.

**Nominations open: April 15, 2016**

**Deadline for nominations for Professional and Hazel Gillespie Awards:  
Midnight, June 13, 2016**



## Friends in High Places

RBC to sponsor NPD 2016 Luncheon for 12<sup>th</sup> year

By Catherine Yates, Communication Chair

RBC Royal Bank is one of Canada's largest corporate donors, with a tradition of philanthropy dating back 125 years. Their support transforms communities from coast to coast, and it makes a big difference for us at AFP Calgary. We are grateful to RBC for its long-term support for Philanthropy Awareness Week. We are thrilled to welcome them back as presenting sponsor of the 2016 National Philanthropy Day® (NPD) Luncheon, for the 12<sup>th</sup> consecutive year.

"We continue to support NPD because philanthropy is at the core of our vision and values at RBC," says Jerilynn Daniels, Senior Manager, Community Investments & Marketing, Public Affairs, Royal Bank of Canada. "Giving back has been a part of our organization since 1891, and what better way to honour that legacy than to support the National Philanthropy Day® Luncheon, one of the largest NPD events in Canada?"

"Our partnership with RBC is extremely important to us," says Sharon deBoer, Co-Chair, AFP Calgary and Area National Philanthropy Day® for 2016. "RBC Royal Bank is widely acknowledged as one of Canada's most charitable organizations. The alignment of RBC's reputation for giving with their 12<sup>th</sup> consecutive commitment to National Philanthropy Day® is exactly what we want and expect from our lead sponsor. Thank you RBC! Your leadership and support for community, in Calgary and across Canada, is inspiring."

Attended by approximately 1,000 guests each year, the NPD luncheon is the flagship event of a week that celebrates generosity and community spirit. "Personally, it's always been one of my favourite events," says Jerilynn. "It's so nice to see the good being done in our community. You can't help but feel great when you see the scope and breadth of people being honoured, including children. It's very inspiring."



National Philanthropy Day®

"It's also a bit like 'old home week' for us. We have lots of community partners and this is an opportunity to invite them to join us and to visit with them."

For the last two years, RBC and Imperial Oil have worked together to conceive of and jointly sponsor an innovative Twitter contest at the Luncheon that last year generated more than 2,014 posts and \$10,000 for the Distress Centre's 211 Calgary Service.

"There is more opportunity with Philanthropy Awareness Week to collaborate with other sponsors than we might typically have," explains Jerilynn. "We both feel like this has been successful, has helped to heighten awareness and has put some extra money behind good causes in our city."

We look forward to working with our friends and sponsors as planning gets underway for Philanthropy Awareness Week 2016. Thank you RBC!



The team from RBC Royal Bank at the National Philanthropy Day® Luncheon 2015.

**"Thank you RBC!  
Your leadership  
and support for  
community, in  
Calgary and  
across Canada,  
is inspiring."**

Sharon deBoer

## Calgary Chapter Pulls its Weight at AFP International

By Wayne Steer, AFP Calgary & Area Chapter President

*"I couldn't have been prouder of each of you!"*

– Wayne Steer

Many members are not aware that one of the mandatory activities of a chapter president is to attend the AFP International Conference and represent your chapter.

In the process of assuming this duty this March in Boston, I had the pleasure of sharing many of the activities that the Calgary & Area Chapter engage in throughout the year and hearing about the wonderful things that are happening in other chapters throughout the world.

I was able to share our success with Philanthropy Awareness Week, Banff Compass, and Calgary Compass and

marvel at the incredibly strong leadership of our members within AFP International with no fewer than 10 members representing the chapter in significant national and international roles.

AFP Calgary & Area was formally recognized by AFP International for many areas including achieving Friends of Diversity and Ten Star Chapter designations.

Knowing that Calgary is experiencing some significant economic challenges that we have not seen for seven years, it was a little surprising and humbling to have been called up in front of all the other presidents and delegates from all over the world to accept three awards on behalf of all of you, members of AFP

Calgary & Area Chapter, for achievements in our weight class.

We have been recognized by AFP Foundation for Philanthropy with the following Every Member Campaign awards in our Chapter group (251-400 members):

- 2015 Annual Fund Award for the Highest Percent Member Participation
- Highest Chapter IMPACT gift
- Annual Campaign Award of Excellence

This is especially rewarding considering that, in late December last year, the Board realized we were in peril of not meeting our Every Member Campaign (EMC) goal. Our EMC Chair, Michelle Regal, CFRE, mobilized all of us to reach out and ask for your help. Thanks to YOU, we achieved our goal and even received recognition as the chapter with the highest participation.

Our collective gifts to EMC allow for scholarships for members to attend national and international conferences, and studies into donor profiles and Diversity and Inclusion, as well as major research studies like the recently released "What Canadian Donors Want" report. (For more information on the benefits you have thanks to your donations, please see [AFP Foundation for Philanthropy – Canada](#)).

Thanks to YOU Calgary continues to be considered a worldwide leader in the AFP family.



Leah Eustace, ACFRE (AFP Foundation for Philanthropy – Canada) presenting Wayne Steer (President AFP – Calgary & Area Chapter) with the Chapter Awards for 2015 EMC participation at the AFP International Conference in Boston, MA.





## Message from the President



Wayne Steer, President  
AFP Calgary & Area Chapter

### New Strategic Plan in the Works for 2016-18

The AFP Calgary & Area Chapter engaged in a detailed SWOT analysis led by Jan Hollingsworth of *Journeys Inc., Training in Communication* at our January Board meeting followed by an intensive session at our March Board meeting on "Finding Our Why" lead by Jocelyne Daw of *JS Daw & Associates*. We have struck a small task force of key board members to boil down the results of these working sessions to arrive at three general objectives and the strategies to get the chapter where it needs to be over the next three years.

Now you may wonder why all the time and fuss for such a straight forward process? I was kind of wondering that myself until I experienced the same issues at the international level as we all look at our roles as part of a professional fundraising association.

All chapters must adhere to the AFP International Mission and Vision that was created over a decade ago. To their credit, AFP International is making a great effort to consult with all chapters to define the face and role of the fundraising profession in the coming years.

They, like us, know that the world has changed and we all are faced with the reality of remaining relevant in the ever changing world. So while we continue to adopt the Mission and Vision as prescribed to adhere with our obligations to AFP, the AFP Calgary & Area Chapter is working to better reflect the environment in which we operate and to improve the benefits that we provide to you, our members.

Thank you all for your patience, input and continued membership. We look forward to sharing our Chapter's new strategic plan with you soon.

## Calgary Board Names New Chairs in Diversity & Inclusion, Youth Philanthropy

By Wayne Steer, AFP Calgary & Area Chapter President

The face of diversity on the AFP Calgary & Area Chapter's Board is changing with the appointment of Chairs in the areas of Diversity & Inclusion and Youth in Philanthropy.

In 2015, the chapter embraced Diversity and Inclusion during Philanthropy Awareness Week's Professionals Forum, the December Chapter Luncheon and other events and activities. These efforts have resulted in the Chapter being recognized again this year with the Friends of Diversity designation.

Thank you all for making this happen!

For the past four years, I have been the face of AFP's diversity in Calgary working off the corner of my desk, but the role offers so much more potential for our community with the right Chairs and the right team in place.

In January, the Board appointed Stephanie Raynor-Hohol as Chair, Diversity & Inclusion. Stephanie currently works in the area of corporate social responsibility and fund development. Also appointed as Chair of Youth in Philanthropy was Sheliza Kassam, an engineering student at University of Calgary and Founder & President of Children's Birthday Miracles. Sheliza was our Chapter's Outstanding Youth Philanthropist honouree in 2013.

Both women bring passion, dedication and some great ideas to the Chapter and are looking for some people to share that passion and realize our potential. I'm pleased to introduce you to both Stephanie and Sheliza to tell us a little about what the future could look like with your help.



Stephanie Raynor-Hohol

### Diversity & Inclusion

*Good day! Thank you Wayne for the wonderful introduction. I am very excited with the new opportunity as part of the team. I am looking for members and non-members to join me and make an impactful difference and help AFP build its subcommittee for Diversity & Inclusion for the Calgary AFP Chapter. Please e-mail me directly if you would like to be part of this AFP subcommittee and help us be successful. Cheers and thank you for your time!*

Steph

[steph@stephanieraynorhohol.ca](mailto:steph@stephanieraynorhohol.ca)



Sheliza Kassam

### Youth in Philanthropy

*It is with great honour that I have been selected as the Youth in Philanthropy Board Member for AFP Calgary. As the youngest member on the Board, I aim to bridge the gap between emerging professionals and experienced professionals. To complete this goal, we have developed a Youth Committee consisting of 15 University and High School students from across Calgary. This diverse group of youth will allow AFP to strive in motivating youth to give back to their community. I look forward to all the opportunities and experiences in the near future as the Youth in Philanthropy Board Member. Thank you.*

Sheliza



## The Perfect Volunteer Role

### Recruiting Leaders for AFP Calgary & Area Chapter Board of Directors

By Lori Abernethy, CFRE

AFP Calgary & Area Chapter was established in 1996 in what was then known as NSFRE, the National Society of Fundraising Executives. The organization has since become the Association of Fundraising Professionals and is an international organization. Since 1960, the Association of Fundraising Professionals (AFP) has inspired global change and supported efforts that generated over \$1 trillion. AFP's nearly 30,000 individual and organizational members raise over \$100 billion annually, equivalent to one-third of all charitable giving in North America and millions more around the world.

**Our Chapter is recruiting for its Board of Directors for the term July 1, 2016 to June 30, 2017.** The Calgary & Area Chapter is one of the largest in Canada with over 365 members. Joining the leadership of our Chapter is an investment in yourself and your profession. The Board of Directors offers individuals the opportunity to contribute to the fundraising profession as well as contribute their skills and competencies to guide and shape our local Chapter.

If you are interested in joining with other like-minded professionals and would like more information in supporting:

#### OUR VISION

*Every member is an effective and ethical practitioner.*

#### OUR MISSION

*AFP Calgary & Area is an association of professionals advancing philanthropy through ethical and effective fundraising.*

#### OUR CORE PURPOSE

*To advance ethical and effective fundraising.*

Please contact Lorie Abernethy at labernet@shaw.ca or the AFP Office at 403.297.1033. We look forward to working with you.

## Don't Miss Calgary Compass 2016

Join us for our bi-annual Calgary Compass located at Hotel Blackfoot on May 18th, 2016. This full day workshop will run from 8:00 a.m. – 5:00 p.m.

The morning will consist of AFP International's *Keep Your Donor Workshop* which is based on data collected via the Fundraising Effectiveness Project. This workshop will be facilitated by Cheryl Hamelin, CFRE, AFP Calgary's 2015 Outstanding Fundraising Professional. The four-hour workshop includes small group work that is both substantive and enjoyable. The focus of this workshop is on developing a donor retention plan based on what research indicates really works. It shows the value of tracking overall gains and losses in gifts and donors, and then using the information to develop cultivation strategies to improve donor retention.

After the workshop we will break for lunch which will consist of a panel discussion with our Community Fundraising colleagues facilitated by Ron Burke.

The afternoon will consist of six breakout sessions including:

- **One of These Things is Not Like the Other: Why This Recession is Different** – Stu Reid, CFRE
- **Growing Donors in an Uncertain Economy** – Scott Decksheimer, CFRE and Brian Bowman, CFRE
- **Ethical Considerations** – Derek Fraser, CFRE
- **Data and Strategy: Cultivating the Relationship** – Kirk Schmidt
- **What's In a Name: Stewardship of Named Assets** – Julie Johnston, CFRE
- **Understanding Corporate Social Responsibility & Best Practices to Secure Large Investment for your Origination Successfully** – Stephanie Raynor-Hohol



Calgary Compass 2016

Rates for the workshop are as follows:

Member Full Day – **\$129**  
Earlybird rate of **\$99** until April 22nd, 2016

Non Member Full Day – **\$159**  
Earlybird rate of **\$129** until April 22nd, 2016

Member Luncheon Only – **\$45**  
Non Member Luncheon Only – **\$60**

\*All rates are subject to GST\*

The morning workshop will be worth four CFRE points. We have applied for the CFRE points for the afternoon sessions and will update the website as soon as we know the total CFRE point value. For a full schedule of the day, please click Schedule at the top of the registration page.

See you there!

We are very grateful to Calgary Compass sponsor,

**VITRO** 

Bold Leadership. Transformative Fundraising.

## Do You Want a Mentor?

### Calgary Chapter Introducing New Mentorship Program

In January, we officially launched AFP Calgary & Area's Mentorship Program. This is a one-on-one program in which seasoned development professionals provide guidance and ideas to professionals who are new in the field or who are looking to learn more about specific areas of the fundraising career.

For both mentors and mentees, this is an exceptional opportunity to share expertise, network with and learn from colleagues. This is a one-year commitment for both the mentors and mentees, and since January, we have matched five mentees with corresponding mentors.

We are seeking experienced professionals to provide expertise to mentees. If you wish to become a mentor, please contact Jose Guillen, CFRE at guillenj@shaw.ca. If you wish to become a mentee, please forward the [application](#) to our AFP Calgary Chapter office at [afp@telus.net](mailto:afp@telus.net). Thank you!

## Government Relations Update

By Cheryl Hamelin, Chair,  
Government Relations



### Provincially

#### Highlights:

- On February 2, 2016, six new members were sworn in to Alberta's Cabinet, including a Minister designated exclusively to the Culture and Tourism portfolio. Other highlights of interest to the non-profit sector include the creation of the Alberta Climate Change Office, a renamed ministry and new Minister of Indigenous Relations, the naming of an Associate Minister of Health, as well as new Ministers for Service Alberta, Status of Women, and Seniors and Housing.
- March 2016 – Alberta's privacy commissioner is seeking to bring all non-profit organizations under the Personal Information Protection Act, but some fear compliance with the law will put undue strain on their already limited resources. AFP shares CCVO's view, in their submission to the Standing Committee on Alberta's Economic Future, that PIPA be amended to apply fully to all non-profit and charitable organizations and activities, subject to an 18-month transition period that includes training and education opportunities. See full submission here: <http://www.calgarycvo.org/wp-content/uploads/2016/03/CCVO-PIPA-Review-Submission-FINAL.pdf>

### Alberta Budget April 14, 2016 – Highlights

Although there were no direct charitable or giving implications in the NDP's second budget, a budget built on the assumption of an average WTI oil price of \$42, AFP Calgary members may be interested in this At-A-Glance recap.

- 2016 deficit projected at \$10.4 billion - debt will rise to \$57.6 billion by 2019.
- Royalty revenues expected to drop by 90 per cent, to \$1.4 billion, in 2017 (a 40-year low).
- NDP recommitted to its \$34-billion, five-year infrastructure spending program.
- Small Business Tax Rate (revenue of \$500,000 or less) drops from three to two per cent; gives approximately \$865 million back to entrepreneurs over next five years.
- \$165 million in tax credits, including an investor tax credit, to encourage investment in small and medium-sized businesses and \$25 million in new funding to be invested through Alberta Enterprise Corporation to spur innovation.
- Carbon levies will be added to everything from gasoline to natural gas and propane. Levies on consumer goods will combine with the existing carbon tax on large emitters to raise \$9.6 billion over five years, which the government plans to spend on renewable projects, "green infrastructure" like public transit, and consumer rebates, including those to help low and middle-income Albertans deal with the price on carbon.
- No new taxes aside from the carbon tax.
- Bank of Canada Governor Stephen Poloz recently said the last federal budget – also highlighted by deficit spending – will boost national GDP by 0.5 per cent this year and 0.6 per cent next. This provincial budget will do something similar to provincial GDP.
- The NDP projects a balanced budget by 2024.

### Government Relations Update

Continued on Pages 11

## Government Relations Update

*Continued from Page 10*

### Federally

#### 2016 Federal Budget – Impact on Registered Charities and Non-Profit Organizations

The Minister of Finance tabled the Government's 2016 Federal Budget on March 22, 2016. A few of the tax measures in Budget 2016 that impact registered charities are highlighted below. There are no new tax measures related to non-profit organizations (NPOs).

#### For Registered Charities, Budget 2016 Confirms:

- The Government's intention to proceed with the measure announced in Budget 2015 which allows registered charities to acquire or hold passive investments in limited partnerships.
- The Government's intention not to proceed with the measure announced in Budget 2015 that would provide an exemption from capital gains tax for certain dispositions of private company shares or real estate where cash proceeds from the disposition are donated to a registered charity within 30 days. The removal of this capital gains exemption will come as a disappointment for many in the charitable sector.
- That when a charity supplies property or services in exchange for a donation and when an income tax receipt may be issued for a portion of the donation, only the value of the property or services supplied will be subject to GST/HST. The proposal will ensure that the portion of the donation that exceeds the value of the property or services supplied is not subject to GST/HST. It also brings the GST/HST treatment of this type of exchange into line with the split-receipting rules under the Income Tax Act.
- The Government's commitment to review and clarify the rules governing political activities of charities. The CRA, in consultation with the Department of Finance, will engage with charities through discussions with stakeholder groups and an online consultation.

#### For Non-Profit Organizations

Once again, Budget 2016 was silent on the proposed consultation on the income tax exemption for NPOs (this was first announced in Budget 2014 when the Government intended to review whether the income tax exemption for NPOs remained properly targeted and whether sufficient transparency and accountability provisions were in place.) As part of the proposed review, the Government indicated that it would release a consultation paper for comment and further consult with stakeholders as appropriate. To date, nothing has been released and the status of the proposed consultation remains uncertain.

Annotated federal budget summaries focusing on charities and non-profits are available from Blumbergs, BLG, Carters, Miller Thomson LLP and others.

Bill C-239 – There is no formal AFP position as yet on Bill C-239 (Ted Falk - Fairness in Charitable Gifts) but AFP Canada's Government Relations Committee is monitoring. The bill would better enable registered Canadian charities to attract donations by providing the same favourable percentage of federal tax credits that a political donation would receive. As Private Members Bills are rarely passed into law, it will need to get further through the House before an official position will be taken. Our Canadian and America GR specialists had this to say, *"It sounds promising, but the question is its viability, which is still murky due to a variety of factors including the potential cost (\$1.8 billion per year). Imagine Canada currently is neutral on it."*

## UPDATE: The Canada New Horizons Transition Task Force

*By Lori Gusdorf, CAE, reprinted from AFP eWire Canada, Vol.16, Num.15c*

*A new AFP association governance structure is being considered for Canada. Below is an update on the plan and information on how all AFP Canada members can get involved.*

The Canada New Horizons Transition Task Force continues to make steady progress toward implementation of an enhanced AFP presence for fundraising professionals in Canada. Recommendations to form a Canada-centric association and governance arm in Canada were presented last summer in Regina by the task force chair Denis Lalonde and unanimously approved by the AFP International Board of Directors in October.

Last week, the Transition Task Force convened in Toronto. Chaired by Nicholas Offord, the transition team includes Scott Decksheimer, CFRE, Patrick Feeley, CFRE, Michelle Gauthier, Denis Lalonde, Ken Mayhew, Marnie Spears, and Andrew Watt, Flntf.

**Moving forward, the Transition Task Force will prepare a request for proposals (RFP) to identify a search firm to recruit a senior level staff person with a dual title: Executive Vice President of AFP and Executive Director of Canada.** The position will report to the President & CEO of AFP with a dotted line to an AFP Canada Board, to be appointed separately.

The structure of that board is still under discussion. However, while a final governance model is being considered, it was decided that the Transition Task Force will serve as a nominating committee to recruit the first board chair. **In the coming weeks, all Canadian members will receive forms enabling their participation in the process of nominating candidates for the chair.**

The Transition Team will update and discuss the status of its work with the Canadian Chapter Leadership at the July retreat in Winnipeg. A formal implementation plan and schedule will be presented to the full AFP International Board in October.

Questions? Contact Transition Task Force Chairman Nicholas Offord at [Nicholas@theoffordgroup.com](mailto:Nicholas@theoffordgroup.com).



## AFP Calgary Celebrates Its Committed Members Congratulations to the Plus15 Club

Our sizable Chapter in Calgary consists of hundreds of talented individuals who make our sector strong. For 55 people, the commitment to AFP has been consistent and long-term. We've created the AFP Calgary Plus15 Club to acknowledge members who have been with the Chapter at least 15 years. We will publish our list of honorees every spring.

Congratulations, and thank you for your committed leadership to our Chapter and to the philanthropic community in Calgary!

### 31 Years

Sally Hlavay

### 22 Years (Member since 1994)

Guy Mallabone, CFRE

### 20 Years (Member since 1996)

Joan Black, CFRE  
Therese Takacs  
Barbara Burggraf  
Brian Duclos, CFRE  
Andrea McManus, CFRE  
Cheryl Hamelin, CFRE  
Andrea McLellan, CFRE  
Valerie Hoey, CFRE  
Patricia Matheson, CFRE  
Stuart Reid  
Lou Zaganelli  
Charlotte Adkens-Weiler  
Julie Johnston, CFRE  
Joyce Van Deurzen  
Leone Winthers  
Gail Urquhart

### 19 Years (Member since 1997)

Kathleen Specht  
Anthony Salekin  
Michelle Regel, CFRE  
Phil Levson  
Patricia Christie, CFRE

### 18 Years (Member since 1998)

Kim Laing  
Christine McIver, CFRE  
Holly Davidson  
Betty Thompson  
Neil Williams  
Jocelyne Daw  
Lisa Campbell  
Scott Decksheimer, CFRE

### 17 Years (Member since 1999)

Susan Komhyr  
Jennifer Diakiw  
Ann O'Donnell  
Vicki Kranenburg  
Barb Magill  
Kim Anthony, CFRE  
Helene Weir  
Dolores Coutts, CFRE  
Tony Myers, CFRE  
Sheryl Barlage, CFRE  
Heather Hankins-Bruce

### 16 Years (Member since 2000)

Susan Deike  
Diana Schwenk  
Sherry Dahl, CFRE  
Rae Fehr  
Dianne Fehr  
Kim Kadatz, CFRE  
Bobbi Turko

### 15 Years (Member since 2001)

Patti Brewin, CFRE  
Jennifer Head  
Derek Fraser, CFRE  
Margo Helper  
Brent Barootes  
Michael Donlevy



## Mark your Calendars!

### PROFESSIONAL DEVELOPMENT & ADVANCEMENT

*Advancing philanthropy through education, training and advocacy*

#### APRIL

April 27, 2016

*Beyond the Buzzwords: Proven digital strategies for fundraising*

Location: SAIT

Speaker: Claire Kerr

#### MAY

May 10, 2016

*Full Speed Ahead: Lessons from the fast lane in taking your small shop to the next level*

Location: SAIT

Speaker: Amy Wolfe, CFRE

May 18, 2016

*Calgary Compass*

Location: Hotel Blackfoot

Speakers: Various

May 27 – 28, 2016

*CFRE Review Course*

Location: Hotel Blackfoot

#### JUNE

June 13, 2016

*How Social Justice Fuels Philanthropy*

Location: SAIT

Speaker: Simone Joyaux, ACFRE

June 15, 2016

*Outstanding Fundraising Professional Luncheon and AGM*

Location: Hotel Blackfoot

Speaker: Cheryl Hamelin, CFRE

#### NOVEMBER

November 8, 2016

*National Philanthropy Day® Professionals Forum*

Location: Hotel Blackfoot

November 9, 2016

*Generosity of Spirit™ Reception*

Location: Odd Fellows Building

November 15, 2016

*National Philanthropy Day® Luncheon*

Location: BMO Centre

For more information on AFP programs, or to get involved with your local Chapter, please contact Stephanie McWilliam at [afp@telus.net](mailto:afp@telus.net) or 403-297-1033.

## Welcome New Members

AFP Calgary & Area welcomes the following new members who joined our Chapter in the past year:

Mr. John Bannerman, MA	Evenstart For Children Foundation of Calgary
Ms. Taryn Webb Barry, MA, BA	Etisah Foundation
Ms. Melinda Bondy	Sunrise Native Addictions Services Society
Mrs. Alison Bota	Heritage Christian Academy
Mr. Peter Boyle	Valour Canada
Sandy Bray	TELUS Spark
Willow Carriere	Vida Events
Ms. Kelsey Claeys	Between Friends
Ms. Colleen Clancy	Children's Cottage Society
Ms. Sandra Clarkson	MSH Strategies Inc
Mr. Scott Corner	Horizon Housing Society
Benjamin Crews	
Brenda Davidson	Carriage House Inn
Cameron Diggon	
Jessica Dirom	Canadian Cancer Society
Katie Dodd	Propellus
Cindy Drummond	Calgary Food Bank
Ms. Alison Duff	Calgary Homeless Foundation
Mr. Stephen Duncan, CGA, BA	Parks Foundation Calgary
Ms. Kajsa M Erickson	Alberta Theatre Projects Society
Ms. Rachel Evans, MBA	Boys & Girls Clubs of Calgary
Sean French	The Brenda Strafford Society
Brenda Giroux	Glenmore Christian Academy
Natalie I Green	
Ms. Carolee Gudehus, BA	Big Brothers Big Sisters of Calgary and Area
Mr. Matthew Hanrahan	
Vicki Hauser	University of Calgary
Ms. Margaret Herriman, BA, MA	YMCA Calgary
Mrs. Sarah Hughes	Theatre Calgary
Ms. Tracy Meredith Johnson	Calgary Public Library Foundation
Dena Kameka	Rowan House Emergency
Mrs. Dawn Kloster	Heritage Park
Mr. Alex Laidlaw	RESOLVE Campaign
Karen Lamola, BA	Educationmatters
Cheryl Lemieux	
Dawn Leonard	Boys & Girls Clubs of Calgary
Steve Leong	Canadian Mental Health Association
Mrs. Myrna Linder, MPH	University of Calgary
Tracy Luca-Huger	Juno Foundation
Ms. Charmaine Lyon	Inn from the Cold
Eve Macmillan	Sunrise Native Addictions Services Society
Colleen Martin	Canadian Cancer Society
Michele McDonald	Animal Rescue Foundation
Aisley Miles	Central Alberta AIDS Network Society
Janice Nelson, MBA	Foothills Academy Society
Ms. Patricia Carol O'Connor	The Military Museums Foundation
Elizabeth Reade	National Music Centre
Mrs. Deanne Robinson	ROARR
Mrs. Katrina K Kai Robinson	ROARR
Tara Robinson	Calgary Police Foundation
Estelle Sawh	
Ms. Cecilia Caterina Schlemm, BA	Inn From the Cold
Miss Fay Sze-To	RESOLVE Campaign
Ms. Sara Elizabeth Taylor	Ronald McDonald House Charities Southern Alberta
Donna Vecino, BS	The Mustard Seed
Brittany Voorberg, BA	JDRF
Ms. Kristine Williamson, MBA, BS	Kristine Williamson Consulting Ltd
Mrs. Melissa Woodworth	SAIT Polytechnic
Becky Yost, BA	Between Friends

As a Gold Sponsor, AFP Calgary & Area placed the following message in the event program for Leave a Legacy, hosted by the Canadian Association of Gift Planners, May 7. Leave a Legacy aims to encourage people to support their cause or charity of choice through a charitable bequest.

## TRUST; one small word you can change the world with.

You find a place where your heart, your soul and your head meet; a place where you truly believe that your gift will make a significant difference ... BUT how do you know that your charitable gift is being used as you intended?

An informed donor is an effective donor.

Association of Fundraising Professionals (AFP) members are set apart from others in the fundraising community by rigorous professional development and strict adherence to the industry's code of fundraising ethics that you can trust. An AFP fundraiser shares your goal of ensuring that you and your gift make the greatest impact possible.

Ask if your chosen charity has an AFP member on staff and request your copy of the Donor's Bill of Rights.

For more information, contact the AFP offices in Calgary at **(403) 297-1033** or **afp@telus.net**

Stay informed and up to date with AFP Calgary & Area Chapter's Facebook, LinkedIn and Twitter sites!



Linked **in**.

twitter

