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LETTER FROM THE PRESIDENT

The fall is always a very busy season and October/November 2011 has been no exception. Over the past few weeks we have been collecting and posting materials from the October PFC conference on our website. We now have video clips of our plenary speakers as well as the full text of their outstanding speeches. Do go to our website to check clips from the Governor-General, Susan Raymond, Mark Kramer, Tim Brodhead and Shawn Atleo. It was a terrific line-up of speakers, who made thoughtful and sometimes passionate contributions to our gathering! A report of the conference themes and highlights, with more video clips, will be posted on our website by early December.

Since the conference, we have had a lunch and learn meeting of members in Montreal, with a focus on the work of a group of Quebec foundations to create a Quebec Peace Grantmakers Network (see our website for the presentations and more information on this Network). We will hold two more member lunches in November in Montreal and Toronto, featuring stories from funders involved in addressing the challenges of an aging society.

A number of grantmaker groups met around and after the PFC conference. One of them is the Circle on Philanthropy and Aboriginal Peoples, which held a meeting on First Nations and access to safe water on October 5/6. More on that meeting (and a clip of Chief Shawn Atleo discussing philanthropy and aboriginal peoples) is on the Circle website. Later in this letter you will see references to a new funder collaboration with aboriginal peoples called Inspiring Approaches, launched through Ashoka Changemakers, and intended to support education for First Nations, Inuit and Métis youth. It is exciting to see such major advances in the field of aboriginal philanthropy, with more to come!

Finally we are capping November with the National Summit for the Charitable and Nonprofit Sector, in Ottawa. PFC is a co-host of this unprecedented national gathering of nonprofit leaders organized by Imagine Canada. There will be 450 participants on site in Ottawa. Imagine is also making it possible for people to participate from home through online registration and Internet broadcasting. The Summit is bringing together leaders from across sub-sectors and from across the country to discuss the top four priorities for action identified nationally:

- Improved conditions for the attraction and retention of paid staff
- More diversified and sustainable financing
- Better understanding of our work and our impact
- Enhanced support for the engagement of volunteers/external talent

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I am co-leading the discussion track on financing and anticipating a very focused and engaged discussion indeed. In our December newsletter I will provide a report on the debates and the outcomes of this important meeting for the sector. Do consider participating online if you can.



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GRANTMAKERS ROUNDUP

On Giving in Canada

Following the economic crunch that began in the fall of 2008, Canadians have felt more positive about giving to charitable organizations, but that feeling may not last. According to a poll released in October from Ipsos Reid, 69% of Canadians have made a financial donation to a charitable organization in the past year. That's up from 65% in 2009. But their generosity for the future hinges on the economic prospects of the country going forward. "The outlook for 2012 is not as positive and public sentiment is less optimistic. This does not bode well for discretionary spending and that means charities may very well feel the crunch," says Steve Levy of Ipsos Reid. Much of the cross-Canada increase in financial charitable donations from 2009 to 2011 was achieved in Ontario and Quebec. The rate of financial donation amongst respondents from Ontario increased from 64% in 2009 to 72% in 2011 while the rate in Quebec increased from 50% to 59% respectively. Over the same period, financial donations in the West remained flat at 74% while they dropped in Atlantic Canada from 78% to 70%.

How are Canadians Really Doing

How are Canadians Really Doing is the first-ever composite report from the Canadian Index of Wellbeing. The report asks: Is our overall quality of life getting better or worse? Are we getting closer or moving farther away from realizing the kind of Canada we want to live in? The report shows that in the fifteen year period from 1994 to 2008, Canada's GDP grew by a robust 31% while our quality of life only improved by a very modest 11%.

The CIW is a signature product of the CIW Network which is an independent, non-partisan group, based at the University of Waterloo. While initially funded entirely by the Atkinson Charitable Foundation (ACF), the ongoing work of the CIW is now supported by a Funders' Alliance. Members of the Alliance include the Atkinson Charitable Foundation; RBC Foundation; the Province of Ontario; the Lawson Foundation; the J.W. McConnell Family Foundation; the Canadian Council on Learning and the University of Waterloo.

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The composite report was released in October. Among other CIW publications are: eight detailed research reports on different, but interconnected, categories of wellbeing: Living Standards, Healthy Populations, Community Vitality, Democratic Engagement, Time Use, Leisure and Culture, Education and Environment; a special report *The Economic Crisis through the Lens of Wellbeing* reporting that the current recession will erase many of the economic and standard of living gains made since the mid-1990s; and a special report *Caught in the Time Crunch: Time Use, Leisure and Culture in Canada*. Going forward, the CIW will continue to publish a composite index - with a single number that moves up or down like the TSX or Dow Jones Industrial, giving a snapshot of whether the overall quality of life of Canadians is getting better or worse. It will also update reports on the eight interconnected categories of wellbeing.

On U.S. Corporate Philanthropy

In late October, the Committee Encouraging Corporate Philanthropy (CECP) released *Giving in Numbers: 2011 Edition*, on corporate giving trends in the U.S. CECP identified strikingly divergent paths in corporate contributions since 2007: a quarter of companies increased giving by more than 25%, while 21% reduced contributions by more than 25%, demonstrating that while some companies have been able to surpass pre-2008 giving levels, others are still in a period of rebuilding. Companies are increasingly targeting one or two societal issues rather than spreading funding widely across multiple program areas. The median number of grants per full time contributions employee has declined by 27% since 2007, while the median grant size has increased by 12%.

On Funding for an Aging Society

This month, PFC is putting a spotlight on the initiatives of Canadian funders who are interested in tackling the issues associated with an aging society. At member lunches in Montreal and Toronto, we have invited members and colleagues such as the Drummond Foundation and The J.W. McConnell Foundation of Montreal and the Ontario Trillium Foundation of Toronto to share with their peers some information about what they are doing to explore approaches that could best support seniors and their caregivers through the challenges to health, mobility and autonomy that aging inevitably brings. OTF and SiG@MaRS have partnered to create a series on aging to talk about the needs of Ontario's aging population, and what funders can do. The most recent forum was held in April of 2011 and the many interesting presentations made during that meeting are available to be consulted on the OTF site. See in particular Blair Dimock's presentation on *Aging and the Not for Profit Sector in Ontario: Ready Or Not?*

The next forum in the series will be held at MaRS on April 12, 2012 on the subject of *The Business of Aging - Care, Career & Caregiving*.

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The Task Force on Social Finance – One Year Later

Last year, over 300 people gathered at the MaRS Discovery District for the launch of the landmark report *Mobilizing Private Capital for Public Good* by the Canadian Task Force on Social Finance. The event was a call to action for all to consider the role of capital markets in creating not only economic value, but also social and environmental sustainability in our society.

With the one-year anniversary of this publication as the backdrop, a 2011 Social Finance Forum is being held on December 13th and 14th at MaRS (details available from SiG@MaRS.) The evening of December 13th will feature a reflective discussion on the advancements made in the past year and what is still needed to expand social finance in Canada. This discussion will be led by Antony Bugg-Levine, CEO of the Nonprofit Finance Fund (NFF), who will explore the potential of impact investing during his evening keynote and Canadian launch of his new book, *Impact Investing: Transforming How We Make Money While Making a Difference*.

Updates on Impact Investing

The number of community and private foundations using their investment portfolios to help achieve a social benefit is growing, according to a new report from the U.S. Foundation Center. *Key Facts on Mission Investing* benchmarks for the first time the engagement of foundations with mission-related investment. One in seven (or 14%) of the foundations surveyed for the report are directing their assets to mission-related investments or below-market-rate program-related investments (PRIs). The report also found that more than half the foundations making mission-related investments started doing so within the past five years, while 28 percent started to do so within the past two years.

The interest is certainly growing, but it remains a very small field. In a blog post from Ellen Remmer, CEO and president of The Philanthropic Initiative, *Impact investing – are we finally at the next frontier?*, she notes some of the continuing obstacles, suggesting that while “It’s clear that progress is being made on all fronts and awareness of and interest in impact investment is growing, this is still an industry in the making.”

INTERESTING READING

For Family Foundation Strategy Sessions

It is helpful, especially if you are an emerging family foundation, to take the time to consider before you make a grant which of several grantmaker strategies best fits your philosophy and dynamic as a family. Foundation Source, a U.S. advisory group to foundations, put together a guide *Strategic Philanthropy: Five Approaches for Making a Difference*, that assesses five strategies commonly taken by family foundations, with their advantages and possible disadvantages, and how to do it better in each case:

- Checkbook philanthropists who provide critical unrestricted support
- Responsive funders who actively solicit proposals in their areas of interest

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- Venture philanthropists who strengthen nonprofits for scale-up and sustainability
- Results-based philanthropists who narrow their focus to address root causes
- Collaborative funders who partner with others to reduce redundancy and share knowledge.

On Innovation and Impact: Enough Talk, More Do

In a provocative article for *The NonProfit Quarterly*, Cynthia Gibson of TPI makes a strong argument for applying rigour to the claims made by some funders that they are funding innovation and impact, without evidence of actual outcomes. “It’s little surprise that collective eyes are beginning to roll when the terms innovation and impact are tossed around with little explication as to what they look like on the ground and within a more systematic framework. Maybe it’s time to start putting our money where our mouths are and get serious about assessing what, exactly, is true innovation; and, most important, what are the kinds of innovation that lead to real impact – especially those that can be rigorously assessed and measured.”

PFC FAMILY NEWS AND EVENTS

New on the PFC web site: The 2011 Toronto conference materials are now available, including plenary speeches, video clips and photo galleries. Some of the session presentations are also accessible (via password), for conference attendees and PFC members exclusively.

Upcoming Events

- **November 21**, Montreal, PFC lunch & learn, noon-2:00p.m. ET, *Aging in Place*, The Drummond Foundation and J.W. McConnell Family Foundation will discuss philanthropic initiatives in the field of senior care.
- **November 22**, Toronto, PFC lunch with PFC members, noon-1:30 p.m. ET at the Counselling Foundation of Canada. The Ontario Trillium Foundation will share some of its work on strategies for coping with an aging society.
- **December 14**, Webinar, 2:00–3:30 p.m. ET, *Corporate Foundations 2012: Charting the Future of Corporate Foundations*. This webinar is offered by the Council on Foundations and is free to both members and non-members. Chief giving officers and contributions staff of corporate foundations and giving programs as well as community involvement professionals will learn about solutions and approaches their peers have adopted to increase the value of corporate philanthropy to business and society. To participate in an ongoing online discussion about corporate philanthropy connect to Corporate Philanthropy 2012.

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PFC Publications

New PFC publication available - *Navigating the CRA Website: Charities and Giving* which is an annotated guide to CRA's charities and giving web site, to help registered charitable foundations find what they need to know quickly and easily.

Member News

The Pierre Elliott Trudeau Foundation has announced the latest recipients of the Trudeau Fellowship. Each prize is worth \$225,000. Trudeau Fellowships are awarded to individuals who set themselves apart through research achievements, creativity and commitment to critical social issues of importance to Canada. The four new 2011 Trudeau Fellows are based in Vancouver, Kingston, Toronto and Montreal, with backgrounds in political science, conflict resolution, history and Muslim and women's studies. Through its Scholarship, Fellowship, Mentorship and Public Interaction programs, the Foundation supports outstanding individuals who make meaningful contributions to critical public issues.

Funder Collaboration for Aboriginal Education and Learning

A group of Canadian funders have linked up with Ashoka Changemakers to announce a collaborative initiative to support Aboriginal learning and improved outcomes for First Nations, Métis and Inuit learners in Canada. The group of funders includes PFC members **The Counselling Foundation of Canada, The Lawson Foundation, the J.W. McConnell Family Foundation, RBC Foundation, the Margaret and Wallace McCain Foundation, the Donner Canadian Foundation, the Lucie et André Chagnon Foundation** and the **Martin Aboriginal Education Initiative**. The contest invites individuals, groups or organizations from Canada and around the world to enter their idea or project to the Changemakers Initiative *Inspiring Approaches to First Nations, Métis and Inuit Learning*. All of the entries will be posted online, so that everyone can learn about these great ideas to support First Nations, Métis and Inuit learners to succeed in the classroom and beyond. There are 30 awards being offered ranging from \$500 to \$5,000. The entry deadline is January 27, 2012.

OTHER NEWS AND EVENTS

Transition to the Canada Not for Profit Corporations Act: Advising CRA

Recently, PFC distributed an advisory to members concerning the coming into force of the federal **Canada Not-for-profit Corporations Act**. The Act came into force on October 17, 2011 and federally-incorporated charities have three years to make the transition to the new Act, which involves applying for a certificate of continuance no later than October 17, 2014. In addition to doing this with Corporations Canada, a registered charitable foundation must supply additional information to the Charities Directorate at Canada Revenue Agency. Once the transition is complete, the charity must file certain documents with the Charities Directorate, which has provided a helpful guide and checklist to charities.

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CRA Guidance on the Arts

For funders interested in the arts, the Canada Revenue Agency (CRA) is inviting comments on its proposed Guidance on Arts Organizations and Charitable Registration under the *Income Tax Act*. This draft guidance document provides a helpful summary of how organizations involved in the arts can pursue objectives that fall under one of the charitable purpose categories recognized by CRA in this area: advancement of education; advancement of the public's appreciation of the arts; and promoting the commerce or industry of the arts. In the appendices to the guidance, the CRA provides examples of draft purposes, and also lists art forms and styles recognized by the Directorate.

Blog Spot

Here are some noteworthy blog posts and articles spotted by colleague organizations:

On the Topic of Funder Collaboration

- *From the Foundation Center: "the road less traveled for a reason"?* <http://bit.ly/opqtwu> via @pndblog
- *From the Minnesota Council on Foundations: Keys and Benefits to a Successful Collaboration:* <http://bit.ly/okYyq2> via @followmcf

On NonProfit Leadership

Four Kinds of Nonprofit Leaders We Need Now – Rosetta Thurman outlines the key leadership types that must be engaged by the nonprofit sector. <http://tinyurl.com/coq54z7>

On Philanthropy

Modern proverbs for giving – from the Philanthropy Roundtable Annual Meeting in October 2011. <http://tinyurl.com/cs3zuu7>

Upcoming Conferences

- November 28 to 30, 2011, Ottawa. *National Summit for the Charitable and Nonprofit Sector*. The National Summit, supported by the Agora Foundation, is hosted by Imagine Canada in partnership with Philanthropic Foundations Canada, Community Foundations of Canada and United Way of Canada. You can participate from your desktop by registering for the online participation.
- February 13-15, 2012, Miami, FL: Council on Foundations, 2012 Family Philanthropy Conference,
- March 12-14, 2012, Seattle, WA: Grantmakers for Effective Organizations (GEO) National Conference.

