Resource Centre for Voluntary Organizations

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Connections

YOUR INFORMATION DESTINATION

Dispelling ten common myths about evaluation

by Wendy Doughty

Courtney (2002) in his book, Strategic Management for Voluntary Nonprofit Organizations, offers the observation that nonprofits are facing increased requirements for accountability, increased demand for services and increased competition for contracts and funds. In response to this increased demand for accountability, nonprofits are also facing increased requirements for reporting of outcomes supported by evidence-based research.

In addition, nonprofits are increasingly expected, when applying for funding, to demonstrate evidence of the need for program/services and evidence to support proposed outcomes. Such requirements place a demand upon the nonprofit agency that may, in some cases, exceed the capacity of the agency both in terms of human and fiscal resources. At the very least, this "burden or proof" can stimulate some negative response on the part of staff members at various levels in an agency for the resulting requirement to conduct evaluations.

Much has been written about the value of conducting formative and summative evaluations of programs and services. Yet, in my evaluation work in the voluntary sector, I continue to hear expressions of concern about the value of evaluation findings to program/service providers, to those who provide funding for programs/services and to clients who access these programs/services.

I find that many of the concerns expressed in the voluntary sector about evaluation stem from common misunderstandings or myths about evaluation. Here are the "top ten" common myths that I regularly hear associated with the term "evaluation."

Myth #1

Those who provide funds for programs and services will not support the costs of conducting an evaluation. Just as providers of programs/services are experiencing increased requirements for accountability and demonstration of results – so are those who provide funding for these initiatives. Voluntary sector agencies need to be proactive and initiate discussions with funding sources regarding support for evaluation of programs/services at the time they are developing their funding request.

Myth #2

Program evaluation is costly. True, there are costs associated with evaluation of programs and services, whether internal or external resources are used. By comparison, what is the ultimate cost of operating programs/services that do not

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Life is not measured by the number of breaths we take, but by the moments that take our breath away.

Lisa Beamer

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respond to the needs or are not in the best interests of clients?

Myth #3

Internal evaluations do not have sufficient rigour to be acceptable to parties providing funding for programs/services. The concept of evaluation conducted by staff members within an organization has been described in the evaluation literature for many years. In addition to being cost effective, internal evaluation may be the most appropriate approach in situations where staff has access to clients who may be unwilling to meet with an external evaluator. With training and proper orientation, staff may become quite proficient in conducting internal evaluations.

Myth #4

All program evaluations should be conducted solely by an objective, external evaluator. In recognition of the skills and experience offered by internal staff resources, an external evaluator can often provide valuable assistance with the development of evaluation frameworks, data collection tools, and perform audits of data collection and analysis.

Myth #5

Those providing funding to programs/services are only interested in summative evaluations. This limited view argues that those providing funding are only interested in evaluation to inform decisions about whether or not to continue to support a program/ service. There is growing interest among voluntary sector funders in "interim" or "formative" evaluations so that best/effective practice findings can be shared for the benefit of the community. This also provides program staff with the feedback on how the program may continue to improve.

Myth #6

Clients do not want to be interviewed as part of evaluating a program/service nor will they be able to provide useful feedback or insights about the program/service being evaluated. I am always impressed by the eagerness of program clients to share their experiences as well as the insights they frequently provide in their interviews. If treated with respect and given an opportunity to speak, most people are only too happy to have an opportunity to 'tell their story'.

Myth #7

Evaluation will show that we are not working effectively and result in job loss. It is difficult for committed staff members to understand that an evaluation, particularly one that is formative in nature, is intended to identify what is working well and what could be done better. It is not a performance evaluation of an individual staff member or even the staff as a whole.

Myth #8

If data collection is not working – just stop! Front-line staff may be key partners in the collection of client data to support the measuring of outcomes and otherwise inform the evaluation process. Conflicting demands on staff's available time or discomfort with collecting client information are two commonly stated reasons for not following through with data collection. It is important that someone in the agency perform regular audits to ensure that data is being collected in the agreed upon format so that quality data is available to inform the evaluation process and to honour commitments made to those funding the program/service.

Myth #9

If an evaluation outcome cannot be achieved, just don't report on it. Program/services outcomes should not be developed lightly. Once identified, reporting on the achievement, or non-achievement, of outcomes is critical to guide the improvement of the program or service. Unachieved outcomes can provide valuable learning opportunities for improving the effectiveness of programs/services.

Myth #10

Evaluation is the last step in the project management process. Despite process models that show evaluation as part of a continuous cycle of change and improvement, many still view this as the last stage in the project management process. While it is true that some aspects of an evaluation cannot be conducted until the program is completed, it is important to position planning for evaluation at the early stages of program/project design. In this way, proposed outcomes for the initiative can be considered from a very pragmatic perspective in terms of what data (or evidence) can be collected to demonstrate achievement of the stated outcomes.

By dispelling the previously mentioned ten common myths about evaluation, I hope that you'll view evaluation in a more positive light as a vital process to strengthen and improve voluntary sector programs. ⊡

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Getting an edge with your corporate funding proposal

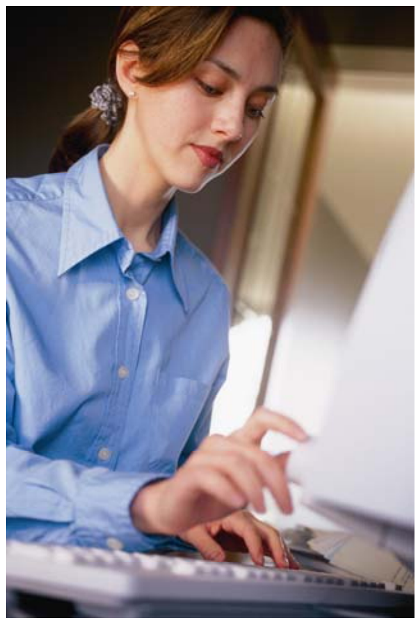
by Daria Luciw

The competition for funding has never been more difficult. But putting in the extra effort and learning about who you are submitting to can make a difference – in your favor. This is true whether you are seeking a foundation grant or corporate support. The following are some points that will help your corporate submission get favorable response in the decision making process. These are tips combined from corporate community investment personnel and personal experience.

1. Make sure you deal with the right contact person. This could be a Community Investment person, marketing division, etc. Know who you need to speak with. Going to the top does not guarantee you results and along the way you could upset those you should be dealing with. Then deliver the message personally when possible. Discuss briefly your idea or need and see if they will be receptive. However not all companies wish to be called and indicate as much in their funding guidelines – watch for this. Remember that corporations are always looking for good opportunities for community profile. They also work to make their stakeholder communities healthier and stronger and wish to build capacity. Who are their stakeholder groups? Typically shareholders, customers, suppliers and of course, employees.

2. Find out about the corporation before you go see them – your research should include: annual reports; news releases; newspapers; their website; community investment brochures/reports; Conference Board of Canada, i.e. Social Auditing Report; are you a customer/consumer - tie it in with the business side, how much money do you spend with them; read the newspaper - watch for stories about the companies you are interested in.

   Be creative with your research.



3. Leverage your relationship with one company and their contact person to deal with other companies – who can they contact on your behalf or provide support for your request elsewhere. If you have a positive and strong relationship, they will be happy to help you.

4. Keep your presentation simple, don't include unnecessary items (confetti, teddy bears!, etc.), and highlight or flag areas they need to see, such as an audited financial report within a larger annual report.

5. Be flexible in your profile vehicles - ask them how they want to be recognized and be accommodating when possible.

6. Ask the corporation for input on what to put into your materials and submissions – also ask them for advice in other areas of your work such as marketing, communications, etc.

7. Corporations want feedback and reporting back to them on your progress on the project they are supporting. Do not assume that because they do not require a final report as some other funders do, that they do not want to know how things are going.

8. Develop volunteer opportunities with and for their employees - look for opportunities to fill Board positions with representatives from your corporate partners, offer volunteer opportunities for a special event, etc.

9. Do regular follow up and contact with your corporate partners to share important news - don't go to them just when you need money.

10. Get to know the person responsible for this area, not just the company - he/she could continue to be a good contact down the road at another position or company.

11. Be persistent - if there is a fit with a company, keep developing the relationship and even if they say no the first time, ask again.

12. Don't sell your soul to get corporate funding - don't change your project/program to fit with the company. They will be able to recognize this.

13. Company's need paper trails - help them by providing detailed invoices to issue your cheque - make sure to ask how they want

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to handle the process and payment, and even remind them (nicely!) when a payment is due.

14. If you are inviting company reps to come to your organization or community, look for opportunities for them to do some business at the same time, i.e. meet with your mayor or other community partners. Also set up your activities at a time that works for them - don't expect them to put in 24 hour days, 7 days a week. ⊡

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New books for your use in the MacEwan library

The RCVO has a large collection of information relating to the voluntary sector located both on site in the RCVO office (Room 5-132, City Centre Campus) and also in the MacEwan College Learning Resources Centre (LRC).

Every spring books are ordered for the college's library. As fall arrives new books start to appear on the shelves, an exciting event for the staff at the RCVO — new titles, new information, brand new books to crack — something that should be shared.

Therefore, it is important to let you know that these materials may be borrowed from the MacEwan College LRC. Here are some ways you can do that:

- If you are from outside Edmonton, you may borrow books through your local library as an interlibrary loan.
- If you live in Edmonton and are a member of the Edmonton Public Library or other participating libraries, you can visit MacEwan's LRC and use your "TAL" (The Alberta Library Card) to borrow materials.
- If neither of these apply and you are connected with a nonprofit/charitable organization (staff, board member, etc.), you may set up special borrowing arrangements with the MacEwan LRC's interlibrary loan department (contact Michelle Bezenar at 780-497-5857 or e-mail her at bezenarm@macewan.ca for information).

In addition, books located in the RCVO may be loaned for short periods of time. For that information, please contact us at rcvo@macewan.ca.

Here are some new titles in the LRC:

Revolution in the mailbox: your guide to successful direct mail fundraising Rev. and updated HV 41.2 .W3788 2004

Nonprofit essentials: the capital campaign HG 4027.65 .W35 2005

What counts: social accounting for nonprofits and cooperatives HD 62.6 .Q373 2003

Strategic planning for public and nonprofit organizations: a guide to strengthening and sustaining organizational achievement 3rd ed. HD 30.28 .B79 2004

An asset builder's guide to training peer helpers: fifteen sessions on communication, assertiveness and decision-making skills LB 1027.5 .V299 2003

An asset builder's guide to youth leadership HM 1261 .A3275 1999

An asset builder's guide to service-learning LC 220.5 .A874 2000

Volunteer management: an essential guide 2nd ed. HN 850 .Z9V64 2003

Self-help accounting: a guide for the volunteer treasurer HF 5686 .N56D35 2003

Take your partner for the corporate tango: a guide to developing successful business and community partnerships HD 60.5 .A8R49 2001

Practicing servant leadership: succeeding through trust, bravery, and forgiveness HM 1261 .P73 2004

Handbook of program evaluation 2nd ed. H 97 .H358 2004

Nonprofit Internet strategies: best practices for marketing, communications, and fundraising HF 5415.1265 .N65 2005

Funding effectiveness: lessons in building nonprofit capacity HD 2769.15 .F86 2004

Creating philanthropic capital markets: the deliberate evolution HV 16 .B47 2004

Why nonprofits fail: overcoming founder's syndrome, fundphobia, and other obstacles to success HD 62.6 .B586 2004

RCVO says goodbye to Laura Berezan

The staff and many clients of the RCVO say goodbye to Laura Berezan and wish her well in her new position with the Board Development Program, Alberta Community Development. Laura has been a valued staff member with the Resource Centre for Voluntary Organizations for the past four years. She has managed the RCVO On the Road Program, has been the critical link to The Muttart Fellows and the Muttart Fellowship Lecture and has been a guiding influence with the organization of the RCVO library. She will be missed!

We do welcome working with her in the future in her new position with the Board Development Program.

She will be a Community Development Officer responsible for coordinating the Board Development Program's volunteer instructors, doing training and organizing the Board Development Community Workshops.

Congratulations and best wishes, Laura. ⊡

The Muttart Fellowships program

The Muttart Fellowships program provides a sabbatical year to senior managers of social-service charities. During their year away from their agencies, they undertake special projects of their own design. These projects are meant to inform the broader charitable sector. The Muttart Foundation's grants provide the salary and benefit costs of Fellows and make available an allowance for expenses incurred in connection with the project.

The program seeks to meet two goals:

- to model within the charitable sector a human-resources strategy that recognizes the value of sabbaticals in giving people an opportunity to renew and remotivate themselves; and
- to help charities obtain knowledge that will assist them in serving Canadians.

Each year, the Foundation selects up to five applicants as Muttart Fellows. Those selected leave their agency for a year-long sabbatical. Starting with Fellowships awarded in 2005, one Fellowship will be reserved for a senior manager in the early learning and child care field. This award, to be called the Bettie Hewes Fellowship, is designed to allow the Fellow to work on a project that improves public understanding or deals with issues affecting early learning and child care. Upon completion of the Fellowship, the Fellow is required to return to their agency and remain there for a minimum of one year.

Eligibility rules, expectations, the application process, and timelines may be obtained from The Muttart Foundation. See their web site at www.muttart.org. ⊡

The Muttart Fellowships

Courses

MACEWAN

Voluntary Sector Management Program

We're Changing & Growing

The Voluntary Sector Management Program (VSMP) is developing additional programming to serve you and the community better. Effective June 2006 many current courses and credentials will make way for new learning opportunities and admission requirements. To ensure you are able to complete all courses required for the current Certificate in Voluntary Sector Management (Fund Development or Volunteer Management Majors), please plan accordingly. Students applying to the VSMP for admission in Fall 2005 should be prepared to complete all current courses by June 2006. Current part-time students planning to complete the existing Certificate should contact the VSMP office at sonnenbergp@macewan.ca or 780-497-5268 to discuss their plans for completing the program within the required schedule.

Register now for all Winter term courses. For more information, contact: Pat Sonnenberg at **780-497-5268, e-mail: sonnenbergp@macewan.ca** or go to **www.macewan.ca/vsm** to view/download the Winter schedule.

The following are the list of courses that will be offered in the Winter term:

Donor Stewardship in Fund Development

Classroom, VSFD 139 (740)
Thurs, Jan 5, 12, 19, 26, 2006
8 am- 4 pm, $395 (includes materials)

Marketing and Communications for Volunteer Managers

Classroom, VSVM 133 (1)
Fri & Sat, Jan 6, 13, 20, 27 & 28, 2006, 8 am-4 pm, $511 + $25 material fee + text

Applied Marketing and Communications in Fund Development

Classroom, VSFD 140 (740)
Tues, Jan 10, 17, 24, 31, Feb 7, 2006, 6-9 pm, $195 (includes materials)

Strategic Management of Fund Development Campaigns

Classroom, VSFD 141 (740)
Thurs, Feb 2, 9, 16 & 23, 2006
8 am-4 pm, $395 (includes materials)

Web Enhanced Self Study
VSFD 141 (830)
Winter 2006 (Jan 16-Apr 21)

Managing Human Resources in Volunteer Programs

Classroom, VSVM 134 (1)
Fri & Sat, Feb 10, 11, 17, 24 & 25, 2006, 8 am-4 pm, $511 + $25 material fee + text

Professional, Legal, and Ethical Issues in Fund Development

Classroom, VSFD 138 (740)
Tues, Feb 14, 21, 28, Mar 7 & 14, 2006, 6-9 pm, $195 (includes materials)

Fund Development Policy, Planning and Evaluation

Classroom, VSFD 137 (740)
Thurs, Mar 9 & 16, 2006
8 am-4 pm, $195 (includes materials)

Working With Not-for-Profit Boards and Committees

Classroom, VSMT 116 (740)
Tues, Mar 21, 28, Apr 4, 11 & 18, 2006, 6-9 pm, $195 (includes materials)

Fund Development Approaches IV: Planned Giving and Major Gifts

Classroom, VSFD 148 (740)
Thurs, Mar 23, 30, Apr 6 & 13, 2006, 8 am-4 pm, $395 (includes materials)

Web Enhanced Self Study
VSFD 148 (830)
Winter 2006 (Jan 16-Apr 21)

Facilitating Learning in Nonprofit Organizations

Classroom, VSMT 122 (740)
Fri & Sat, Apr 7, 8, 21, & 22, 2006
8 am-4 pm, $395 (includes materials)

Volunteer Program Development and Management

Web Enhanced Self Study
VSVM 130 (830)
Winter 2006 (Jan 16-Apr 21)
$511 + $25 material fee + text

Learning Opportunities

"So What? Linking Research & Practice in the Voluntary Sector" 2005/2006 Series

- **November 16, 2005**
- **January 17, 2006**
- **March 7, 2006**
- **April 19, 2006**

Grant MacEwan College
Edmonton, AB

In recent years there has been a massive increase in the quality and volume of applied research regarding best practices in managing and leading nonprofit organizations, involving volunteers, human resource management in the voluntary sector and securing financial resources for charitable organizations.

Grant MacEwan College, through the Resource Centre for Voluntary Organizations (RCVO) and the Voluntary Sector Management Program, is once again offering a series of information sessions and discussions, called the *"So What?"* series, aimed at increasing knowledge and dialogue about applied research with community organizations.

The 2005/06 *"So What? Linking Research & Practice in the Voluntary Sector"* series will see four 2-hour sessions taking place at Grant MacEwan College.

Watch for further information regarding the *"So What?"* series on our website at www.rcvo.org, under Events, or contact the Workshop & Event Hotline at 780-497-4780.

Board Leadership 2006

Saturday, March 18, 2006
City Centre Campus
Grant MacEwan College
Edmonton, AB

Mark your calendars for this date. Join board members from Alberta's nonprofit/voluntary sector organizations to share experiences, to discuss challenges, celebrate successes and develop additional skills to support their board roles!

Explore emerging and current issues for all boards, as well as considering the unique issues faced by boards of "all volunteer" groups and those specific to boards who govern staffed nonprofit organizations.

Watch the RCVO website for details in the new year. Contact Barb Sledz at sledzb0@macewan.ca or call 780-497-4780.

More Educational Opportunities

For educational opportunities throughout the Province (and NWT), we have started a list of providers. Check the following websites for events, dates and times. Please send us your suggestions of others we could add to the list.

Alberta Association of Fund Raising Executives (AAFRE)
http://www.aafre.org/

Association of Fund Raising Professionals (AFP)
Edmonton www.afpedmonton.ca
Calgary www.afpcalgary.com

Board Development Program
http://www.cd.gov.ab.ca/building_communities/volunteer_community/programs/bdp

Calgary Chamber of Voluntary Organizations (CCVO)
www.calgarycvo.org

Canadian Association of Gift Planners (CAGP)
www.cagp-acpdp.org

Community Information and Referral Society (CIRS)
Central Alberta Community Portal
www.mycommunityinformation.com

Edmonton Chamber of Voluntary Organizations
www.ecvo.ca

Resource Centre for Voluntary Organizations
www.rcvo.org

St. Albert Community Information and Volunteer Centre
www.st-albert.info

Strathcona County Information and Volunteer Centre
www.ivcstrathcona.org

Volunteer Alberta
www.volunteeralberta.ab.ca

Volunteer Calgary
www.volunteercalgary.ab.ca

Volunteer Canada
www.volunteer.ca

Volunteer Lethbridge
www.volunteerlethbridge.com

Volunteer Management Group (VMG)
www.vmgedmonton.ca

Volunteer North West Territories
www.volunteernwt.ca

Volunteers and unions

by Linda Graff

excerpted with permission from Best of All: The Quick Reference Guide to Effective Volunteer Involvement

Your organization may be unionized and/or some of the staff your volunteers come into contact with, as they work in the community on your behalf, may be organized under a collective agreement. Relationships between volunteers and organized labour are complex and need special consideration.

Unions exist to look out for the interests of their members, and there has been so much downsizing and so many layoffs in the voluntary sector over the last decade or so that union organizers are quite understandably concerned about anything that constitutes even a remote threat to job security. Volunteers may fall into that category from time to time. The expansion of volunteer involvement in the nonprofit sector simultaneously with a general decline (or at least the absence of expansion) of paid staff positions has been sufficient to raise the attention of organized labour. Worse, and fortunately this does not happen often, organizations occasionally make the mistake of laying off paid staff and replacing them with volunteers who are asked to do the work of the staff who have just left. In rare circumstances, the very availability of unpaid workers can be a factor in an employer's decision to lay off employees.

It is important to emphasize that employees do not have to be represented by a bargaining agent to feel threatened by or fearful of the involvement of volunteers, and those kinds of sentiments can play out to potentially ruinous impact on volunteer programs.

At minimum it is advisable for organizations to discuss and decide where volunteers will and will not be invited to participate. Reflecting volunteer involvement boundaries in policies and in the statement of philosophy of involvement can be very helpful in reducing staff anxiety. If yours is a unionized environment, then extra attention to the relationships between volunteers and paid staff is advisable. At no time should volunteers be asked to do work that is covered by a collective agreement.

It is also strongly advised that unionized organizations have clear policy on whether volunteers will be asked to volunteer during a work stoppage or strike. Policies of this nature must be in place before a strike becomes imminent. Waiting until industrial relations have broken down makes the decision-making and policy-writing processes much more complex.

How to develop policy on volunteer involvement during strikes

Following are questions that may help guide the policy development process regarding whether volunteers will be asked to volunteer during work stoppages and/or strikes:

- What role will volunteers play during a strike? Will they be asked to volunteer at all?
- If yes, will work be brought out of the workplace for volunteers to work on? Will volunteers ever be asked to cross a picket line? If yes, under what circumstances?
- Will the organization ask its current volunteers to work during a strike, and/or will it bring in new volunteers to work during the strike?
- What work will volunteers be asked to perform during a strike, e.g., only their regular duties; only quality of life enhancement duties; only non-essential work?
- Will volunteers ever be asked to perform duties normally performed by the workers who are on strike?
- Is there a minimum age for volunteers who cross the picket line?
- Will security be provided for volunteers who cross the picket line?
- Given the turmoil of a strike, will extra provision be made to ensure appropriate supervision and safety of volunteers who have been asked to work?
- Are there processes in place to help mend increased tensions that will prevail in the workplace if volunteers have been asked to work during the strike?
- It is generally agreed that volunteers should have the right to decline a request to work during a strike and/or cross a picket line. How are volunteers informed of this right? ⊡

Linda L. Graff is the Senior Associate at Graff and Associates. She can be reached by phone or fax at 905-627-8511 or by e-mail at ll.graff@sympatico.ca. Her website is www.lindagraff.ca.

Changes to the law affecting registered charities

There have been important changes to the law affecting registered charities and those changes have been described in a helpful booklet available online at http://www.cra-arc.gc.ca/tax/charities/pubs/dg-f.html. For your information, we have included some of the highlights. For full text see their web site.

Why are there changes?

New changes to the *Income Tax Act* directly affect registered charities. To make charity regulation more effective and to enhance public confidence in charities, the federal government and the voluntary sector worked together to make recommendations for reform.

Here are some of the changes:

Registered Charity Information Return

New penalty for failure to file

As a registered charity (i.e., charitable organization or public or private foundation), you have to file a return with the Canada Revenue Agency (CRA) each year no later than six months after your fiscal year-end. For example, if your fiscal year-end is March 31, the return for the previous 12 months must be filed on or before September 30. It is very important that you complete the return accurately and file it on time.

If you do not file your return, your charity is now subject to a $500 penalty in addition to having the registration revoked. Your charity will be required to pay this penalty before a request for re-registration is considered.

Sanctions

To encourage charities to comply with the *Income Tax Act*, there are new intermediate sanctions. In addition to revocation, these new sanctions include fines and a suspension of ability to issue official donation receipts.

For example, sanctions may be imposed for the following:

- failing to file a return;
- issuing receipts with incomplete or misleading information;
- failing to keep proper books and records;
- carrying on unauthorized business;
- providing undue benefits; and
- inappropriately transferring funds.

Appeals

To make the appeals process more accessible to charities, a new unit in the CRA's Appeals Branch will review decisions made by the CRA's Charities Directorate on matters such as:

- denials, revocations and annulments of charitable registration, and
- sanctions.

As a registered charity, if you are not satisfied with the outcome of the review, you have the option of an external appeal. An appeal of a sanction will be brought to the Tax Court of Canada and an appeal of a denial, revocation or annulment of charitable registration will be brought to the Federal Court of Appeal. Information about decisions will be posted on the CRA web site.

Official donation receipts

The name Canada Revenue Agency and the web site address www.cra.gc.ca/charities must now be printed on official donation receipts. For the year 2005, you can use current receipts and add this new information by hand, sticker or stamp. As receipts may have already been issued without this information, the CRA will still honour these receipts for the year 2005.

For a complete listing of requirements for official donation receipts and to download a sample official donation receipt, please visit the CRA web site at www.cra.gc.ca/charities.

How can I find out more information about the changes?

To explain the changes and other requirements for registered charities under the *Income Tax Act*, the Charities Directorate of the CRA develops newsletters, policy documents, forms, publications, fact sheets, questions and answers and also hosts a Roadshow throughout the country. To access this information and to register for the Roadshow, please visit the CRA web site at www.cra.gc.ca/charities.

The Charities Directorate also offers an electronic mailing list that provides regular information updates. To ensure that you receive up-to-date information, it is important that all registered charities subscribe to this free service at www.cra.gc.ca/eservices/maillist/subscribecharities-e.html

To contact the Charities Directorate e-mail:

www.cra.gc.ca/charities

Please note:

For information on Disbursement quotas, see the web site listed above.

Registering a charity - a process of careful documentation

by Dree Thomson-Diamond

Last article I promised that I would write about navigating the CRA website and their paper, Registering a Charity for Income Tax Purposes. I began this undertaking by signing on to http://www.cra-arc.gc.ca, selecting the Charity option and here I came to a stop. To attempt to summarize this site is almost impossible.

For those of us who regularly utilize the CRA website, the menu list makes reasonable sense, but I stopped, in part, because I was reminded of a phone call that I received earlier this summer from someone attempting to collect all that they needed to register their charity. At the time I verbally walked them through the CRA site and how to find the right application documents…

1. Sign on to the CRA website www.cra-arc.gc.ca
2. Select the Charities option (left column)
3. Select the Forms and Publications
4. Select the Registering a Charity for Income Tax Purposes and print off a copy of this document
5. Select the Registering a Charity form and proceed (Form T2050)

I then shared with them a few additional resources and tools that I regularly review when helping a group with their applications. These include, but are not limited to:

1. Miller Thomson LLP Charities and Not-for-Profit Newsletter http://www.millerthomson.com. Click on publications and then on Charities and Not-For-Profit Newsletter.
2. Carter & Associates Charity Law Bulletin http://www.carters.ca/

   These two law firms regularly produce briefs pertaining to recent changes in legislation and the impact that these have on a charity including charitable structure.

3. Alberta Government Board Development resources http://www.cd.gov.ab.ca/building_communities/volunteer_community/programs/bdp/services/resources/workbooks/index.asp

   CRA has specific charity registration criteria for select provinces; their criteria for Alberta outlines some specifics for bylaw structuring. The basics for these bylaws are outlined in CRA's document, Registering a Charity for Income Tax Purposes, however, actually creating effective bylaws that encompass these criteria as well as meeting Alberta provincial requirements is easiest for an organization to meet by following the "how to" of creating bylaws based on the Bylaws workbook available through the Resource Centre for Voluntary Organizations (order form at www.rcvo.org) or through Volunteer Calgary (www.volunteercalgary.ab. ca).

4. Association of Fundraising Professionals http://www.afpnet.org/
5. Canadian Association of Gift Planners http://www.cagp-acpdp.org/main_frame.htm
6. Alberta Association of Fund Raising Executives http://www.aafre.org/

   Several professional associations providing services within Alberta keep their members apprised of changes impacting the charitable sector. I find the websites of each to be informative and hold active memberships so as to ensure that I remain as current as possible in the legal, ethical and practice issues and standards of the not-for-profit sector.

There are numerous other sources that can and should be drawn on by those of us working in the sector. However, for the purposes of registering a charity, those listed above are a good start.

Remember, nothing is more vital than a good plan when beginning the overall process. Knowing what business your organization is in, the vision, mission and values of your organization and who else exists to offer similar services are an important first step in the charitable registration process. ⊡

Dree Thomson-Diamond is a Certified Fund Raising Executive specializing in organization growth through effective, experienced and creative fund development, management and communication counsel. Please direct your comments and questions to her at dree.thomson@telusplanet.net or by phone: 780-438-1093.

Character in fundraising - principle number one: intelligence

by Roger Breault

This article is the first of series on the subject of seven character traits to develop to become an effective, productive and authentic fundraiser. It is written with the intent to fill a sizable gap in the formation and education of those who want to be true fundraising professionals.

“All the books that we will ever need to make us as rich, as healthy, as happy, as powerful, as sophisticated and as successful as we want to be have already been written. There is little difference between someone who cannot read and someone who will not read.” So says Dr. Jim Rohn in his book, The Five Major Pieces to the Life Puzzle.

Are you working smarter as a fundraiser than you were at this time last year? Intelligence in fundraising comes in many forms. The practical application of the “how to’s” of the business is just the beginning. We all know however, that mastering technique is not enough. The true measure of our improvement is personal growth.

This takes a continual and methodical commitment to learning. Books, audiotapes, conferences and speakers teach us how to become better at what we do. They inform, inspire and encourage us to raise the bar. Here is the ultimate question. What are we doing to apply this intelligent thinking?

The most common maxim of the popular philosophers, the Covey’s, Peale’s Carnegie’s, Jeffers’ Schuller’s and Ziglar’s of this world, is to always benefit from our mistakes. Success lies hidden in error. We can all learn from our mistakes if we are intelligent about it. Every mistake we make reveals an opportunity for growth. Yet, why is it that many of us commit the same blunders repeatedly?

It’s simple. We lack the clarity to see where we have gone wrong and secondly the discipline to mend our ways. Character lies precisely in the promise to ourselves and to our respective employers to become continually better.

Much has been written and said about it, but in the end, it all boils down to two golden rules. We are all intelligent enough to reflect on what we have done and what we do daily. Recording our actions aids to interpret our actions. Some of the greatest thinkers, Montaigne, Thoreau, Socrates, Franklin did precisely that. That’s how they grew up to be so “healthy, wealthy and wise.” Their consistent review of their encounters and confrontations gave them the insight to know what habits they needed to change to renew their commitment to living full lives. That’s the first half of it. The second is to fix it –permanently, through a deep and abiding desire to develop and practice principles and philosophies that become you and bring out the best in you.

Intelligence in fundraising goes beyond reading the professional literature. The expansion of your horizons to include gurus in all aspects of management, motivation, personal growth, philosophy, good literature, humor and even spiritualism is essential. Apply universal truths and guiding principles to consistently improve your personality and your character.

Recommended Readings on the Subject of Intelligence in Fundraising:

Covey, Steven
Seven Habits of Highly Effective People

Goldman, Daniel
Emotional Intelligence

Morgan Bynan, Margaret
Speedlearning for a Higher IQ

Peale, Norman Vincent
The Power of Positive Thinking

Rohn, Jim
The Five Pieces to the Life Puzzle ⊡

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Philanthropy Day 2005

Wednesday, November 16, 2005
Shaw Conference Centre
Edmonton, AB

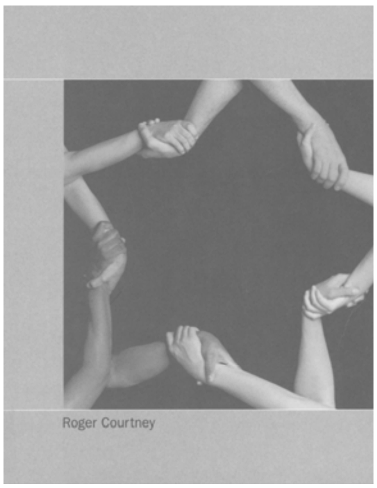
2005 Philanthropy Day Awards
The Association of Fundraising Professionals (AFP) Edmonton & Area Chapter is proud to present the 7th Annual Philanthropy Day Heart & Soul Awards Luncheon.

The Mayor of Edmonton, Stephen Mandel and Ruth Kelly, President, Venture Publishing and the Chair of the Board, Edmonton Chamber of Commerce will host this year’s program.

The Heart & Soul Awards are dedicated to the celebration of all donors, volunteers and organizations that have chosen to give in the spirit of Philanthropy in order to make our communities healthy, vibrant and caring.

Tickets are now on sale for this event; phone 780-459-8682 or e-mail: info@afpedmonton.ca.

BOOK REVIEW



Strategic Management for Voluntary Nonprofit Organizations

by Roger Courtney
HD 62.6 .C68 2002

At first glance, the format of this book suggests it is a textbook (due to inclusion of questions and suggestions for further reading at the end of each chapter). Upon further review, the reader will be impressed with the breadth, depth and relevance of the book's content.

Courtney first presents the case for the importance of strategic planning in the nonprofit sector. He then provides a comprehensive synthesis of strategic planning theories and their application to the nonprofit sector. He urges the reader to look beyond "strategic planning" to "strategic management" and the tools that support this paradigm shift. Finally, the book provides a series of case studies that highlight the material presented in the book.

This book will appeal to those who are interested in the history and evolution of strategic planning, with a particular focus on nonprofit organizations. The writing is well supported by references to a substantial body of research from many disciplines. Courtney does cause the reader to reflect upon the importance of strategic planning/management to nonprofit organizations and presents a framework to assist with selecting tools and strategies most appropriate to an organization.

Reviewed by Wendy Doughty (see her article on pages 1 and 2).

To borrow these books from Grant MacEwan's Learning Resources Centre, contact Michelle Bezenar, Interlibrary Loans, phone 780-497-5857, e-mail: bezenarm@macewan.ca

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