

Connections

YOUR INFORMATION DESTINATION



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Linda Graff on the future of volunteering An interview by Lynda Robertson



Linda Graff, internationally renowned expert on volunteering and volunteerism is scheduled to speak in Calgary and Edmonton at the end of February. Lynda Robertson from the Resource Centre for Voluntary Organizations at Grant MacEwan College caught up with Linda and asked her to talk about some of the new issues she will cover in her workshops and some of her thoughts on the future of volunteering in Canada.

Robertson: You're coming back to Calgary and Edmonton soon.

Graff: I always enjoy working in Alberta. There is no other province in this country that supports volunteerism like you do in Alberta. And it shows. There's a very high level of competence and expertise among managers of volunteers in Alberta communities so it's always a pleasure to train there. I'm also excited about the engagement because Volunteer Calgary and Volunteer Edmonton (sponsors of the events) are giving me the opportunity to present some new sessions and that's always interesting and fun.

Robertson: Tell us about some of the sessions you have planned.

Graff: Sure. It will be a full agenda in both cities with lots of new material.

The first session planned in each city is on "boundaries" for volunteer programs.

Robertson: What's that about?

Graff: This is a topic that has evolved for me out of my many years of work in risk management, and I think it is one of the most important topics in volunteer program management these days.

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Use what talent you possess: the woods would be very silent if no birds sang except those that sang best.

Henry Van Dyke

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As we ask volunteers to take on increasingly complex, responsible work, and as we ask them to work with and connect directly with clients (students, residents, patients, participants, consumers...whatever they happen to be called in any specific setting), questions about the “edges” of the work become more difficult to discern.

For example, how far should a volunteer go to be helpful? How friendly is acceptable, and where’s the line between friendly and being a friend? And is it okay for the volunteer to cross that line? And if so, how far? Similar questions arise regarding what is in and what is outside of the position description.

One of my associates has been doing workshops for volunteers on this topic for a number of years and what we’ve found is that volunteers almost always think it’s acceptable to “go further” than their organization would feel comfortable with. Interestingly, I’m finding very few organizations have paid attention to this matter of boundaries and the workshop is always really interesting and provocative. It’s also usually a lot of fun as we play with what is okay and not okay. It gives participants lots of food for thought as they go back to their organizations and begin to explore where boundaries are needed in their own programs.

Robertson: And the other sessions?

Graff: The two sessions which will be delivered on the second day are closely related. The first deals with how volunteer programs can be modified to make them more attractive to baby boomers. There’s an interesting thing happening right at the moment. I think there is a great deal of hope in the voluntary sector that baby boomers will move into volunteering in large numbers as they move close to and into retirement.

The problem is that there is evidence which suggests exactly the opposite.

We would normally think that people would increase their volunteering as they approach their retirement years...but it just isn't so

Robertson: That’s a disturbing message!

Graff: Yes. What we’re seeing is that there is a very close connection between participation in volunteering and one’s life cycle stage. So, for example, volunteering rates are quite high among older adolescents. Those rates decline a great deal among people in their early 20s. Rates increase again through the 30s and 40s, and stay high into the early 50s. However, at about age 55, participation in volunteering begins to decline. This is counter-intuitive, I know. We would normally think that people would increase their volunteering as they approach their retirement years and as their “free time” increases. But it just isn’t so. And, the decline in participation drops even more dramatically at about age 65.

What’s important about this is two things. First, this life cycle-linked participation pattern is replicated repeatedly in surveys in Canada and elsewhere. So it’s a pretty solid fact. These patterns reflect what people usually do. Second, because we have such a large bulge of people just approaching that magic point where participation starts to drop off—and by the way, they are the people who have been volunteering in fairly large numbers through their 30s, 40s, and

early 50s—even a small decline among such a large group of people would have a very significant impact. And this comes at a time when nonprofit organizations are already reporting increasingly serious volunteer shortages, shortages that are significant enough to have an impact on capacity to deliver services. Compound these facts with the certainty that many boomers will in the not-too-distant future transition from volunteer service providers to service users, and the potential magnitude of the problem begins to reveal itself.

Interestingly, there is a growing interest in boomer volunteers. In the last few months at least half a dozen research reports and papers on the topic have crossed my desk. Underlying much of the current “buzz” is a presumption that boomer volunteers will just keep volunteering. Indeed, many are thinking boomer participation in volunteering will increase because, after all, they’re about to step into all of this extra time, right? And they may. But I doubt it. If they follow well documented and widespread historical patterns, just the opposite may be in our future.

Robertson: So what’s to be done?

Graff: Well, that’s the question, isn’t it? There is no single answer, of course. And without getting into the full range of the discussions that Paul Reed (Senior Social Scientist at Statistics Canada) and I have been presenting in our Canada Who Cares? (www.canadawhocares.ca) initiative, I think we need concerted action on a number of fronts. As I’ve been calling for for more than two decades, Canada and Canadians need to start paying attention to volunteering. Volunteering needs support. It needs help—from governments, from funders, from the private sector, from communities and community leaders. Without a broad-

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brush approach, it will be difficult to lure boomers into, or *back* into, volunteering.

There's another response though, that is more the topic of this workshop in Edmonton, and that has to do with how organizations will need to adjust their conceptions of what volunteers can do for them. What we can be pretty certain about is that the majority of boomers won't be attracted to long-term or ongoing positions. They'll want freedom and flexibility. They'll want short term jobs that are productive, meaningful and rewarding. They will not want to do the maintenance and administrative work that veteran era volunteers have sustained over the last three decades. Sure there will be exceptions, but I think nonprofits are making a big mistake if they think they will continue to be able to run their branches and chapters and fundraising appeals by volunteer labour alone. That work is just not appealing to younger volunteers.

In the Edmonton session, we'll talk about all the ways that volunteer programs and volunteer positions might need to be adjusted to make them attractive to the approaching boomers. And we'll also look at how organizations will have to adjust as well. It's not just about tinkering with existing positions. I think these soon-to-be upon us trends will demand some fundamental rethinking about how to engage all of our human resources, paid and unpaid, to best achieve our missions.

Robertson: And the other session?

Graff: The last session is a very new one that I've delivered only twice before—once in San Antonio and once in England this fall, both times to very positive response. This is new material on how we may need to go beyond shifts in position design if we are to attract volunteers in the future. When we look at the preferences and

limitations of not only baby boomers, but of Gen Xers and Gen Ys and even younger volunteers, what we see is a very different ethic from the long civic generation, many of whom were driven by a sense of civic duty and a genuine caring for the common good. I think what we see in younger volunteers, including boomers, is possible pursuit of volunteering, not out of duty, but as an opportunity.

The basis of the volunteer relationship is no longer “giving” but rather, “exchange”. My sense is that most volunteers now want something back from volunteering. And they are more likely to volunteer to produce amenities and services than they are to simply help someone else.

They are more likely to want to tell you how to run your program than to quietly take orders.

But there's more going on as well. Boomers are highly skilled, better educated, more demanding, more picky. They're used to having their own way and exercising their influence and not-inconsequential power. They are more likely to want to tell you how to run your program than to quietly take orders or do your work as you say just *because* you say. They will demand a different *management style* from us. I'm still working out a good deal of what this might actually mean as it plays out on the ground, but, for example, I'm thinking we may need to break down or at least modify some of the rules and bureaucracy we've spent the last two decades building.

Robertson: There's a bit of irony in that kind of message coming from you, isn't there?

Graff: Yes, the irony hasn't been lost on me! I've spent the better part of 30 years admonishing managers of volunteers to get more serious about their volunteer program management systems and infrastructure. My workshops and writing have been about developing management systems to manage risks and ensure quality programming. Now I'm rethinking some of that and looking for ways that heavy-handed bureaucracy might be modified. We can make it more palatable and less of an obstacle to new groups of volunteers who are as likely to just go around us if we put too many obstacles in their way.

And interestingly, there's an Edmonton agency that has had a good deal of influence on my thinking in this direction. I can't mention them here without their permission, but perhaps I can persuade them to join us when I'm in Alberta and have them share some of the very concrete and hugely successful modifications they have made to their screening and integration systems to make them less cumbersome for volunteers. The results they've had are staggering.

That's a quick overview of the last session. It's a bit more involved than I'm making it out to be, but I think the key point is that it sets out some very new thinking—“musings” might be a better word—about very new shifts that may be required just around the corner.

Robertson: Nothing ever stays the same for you, does it?

Graff: No, that's true. I guess that's why I still love this work after nearly three decades in the business. And there has never been a more exciting time to be in volunteering. There is

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so much change approaching, here in Canada, and now, around the world that it is impossible to keep up with it all.

Robertson: You've done a lot of international work in the last few years.

Graff: Yes, I'm actually spending more time training out of Canada than in, these days. And what's interesting about that is that while I'm learning a tremendous amount about what volunteering looks like in other places around the world, I've learned just as much about volunteering here in North America just by gaining an "outside-in" perspective.

There's so much we take for granted here. Volunteering has always been here for us and the tendency is to assume that it always will be here for us. But if you stop to look at that assumption for just a moment, the fragility of volunteering and the volunteer work force becomes terribly clear. This is something Paul Reed and I talk about in the Canada Who Cares? initiative. Despite the fact that volunteers are virtually everywhere, the base, the foundation, of volunteerism is more narrow than most of us realize.

To illustrate, 67% of all volunteer work is done by about 5% of the adult Canadian population. This is the 5-6-7 equation I've been talking about lately. It's the "myth of the inverted pyramid". We think volunteering is solid, but in fact, it rests on the shoulders of just a very few "stalwarts" as Paul calls them. And they are not only aging. Most of them are aged. We can expect that they will be moving out of volunteering in quite large numbers over the next few years. That narrow base is getting narrower. That's why it's becoming ever so much more important to study, research, understand, and attend to volunteering. We've been taking it for granted. Continuing to do so has



the potential to create quite serious consequences.

Robertson: So sum up your thinking for us. Are you worried about the future of volunteering?

Graff: Absolutely. Now I must immediately confess that I'm a die-hard alarmist. Perhaps that comes from too many years in risk management! But my concern is also buffered by an unparalleled optimism as well.

Robertson: What do you mean by that?

Graff: Baby boomers represent the largest repository of skill, knowledge, experience, expertise and influence we have ever seen in this or any other country at one time. As they approach retirement age, they will be making changes in their lives and decisions about their activities and lifestyle. This is the perfect opportunity for us to capture their interest, harness the wealth of their capacity. It is there, idling for us, waiting to see if we'll make the adjustments necessary to gather it together and harness it for the good of our communities.

I have no doubt that baby boomers and younger volunteers could become caring, concerned, engaged, connected citizens. I still do truly believe in the goodness, decency and generosity of Canadians. But those prospective volunteers could just as easily abandon the common good and head off in a hedonistic frenzy towards international travel, golf courses, and all manner of other personal development opportunities so readily available to them.

The key variable dividing these alternatives, at least in my mind, is how responsive the voluntary sector will be in the next very short while. If organizations continue to offer the same kinds of long term, boring, administrative and low level work that so many have for so long, volunteers will simply go elsewhere. If, on the other hand, organizations are willing to make fundamental shifts in how they think about volunteer work and value volunteer potential, nearly unlimited wealth is open to them. As my friend and colleague Marilyn MacKenzie has said, we need to invite volunteers to become solvers of organizational problems, not just doers of small deeds.

Robertson: Do you think organizations are able to make the transitions necessary to turn things around?

Graff: I think they're able. They're just not willing. That's the seat of my pessimism. I see very little evidence of senior management—CEOs or boards—paying any attention at all to volunteering. In fact, despite the fact that I speak with thousands of managers of volunteers every year, I'd be hard pressed to name half a dozen organizations in this country that are really understanding the magnitude of what's afoot and beginning their transitions now.

And now is when the change has to happen. Waiting even four or five years will, I think, put us behind. We'll lose the veteran era volunteers, and the time that it will take to recover from their exodus and rethink and rebuild volunteer involvement opportunities and infrastructure will take too long. In the interim, vast numbers of prospective volunteers will be turned off, put off, and chased off. We're already hearing more and more from

volunteers about their negative experiences with ill-equipped organizations. I was a guest on CBC Radio's Cross Country Check Up at the end of December (the podcast is downloadable from the CBC website at: <http://www.cbc.ca/checkup/archives.html>) and I was amazed at the number of callers who spoke about their not-so-great experiences as volunteers and called for organizations to get their acts together with respect to volunteer involvement.

I've been saying for years that our capacity to recruit volunteers has outpaced our organizations' capacities to effectively engage volunteer involvement. The truth of that claim seems to be evident "on the street". There's no one in this country who would like me to be wrong more than I. I've spent my entire career advocating for volunteering and volunteerism. But I just do not see organizations paying any substantive attention to volunteers or volunteering. In that regard, nothing has changed in 30 years.

Robertson: So, what's to be done?

Graff: I wish I had an easy answer. Paul and I have set out some of our initial thinking about this in the Graff-Reed conversations. But it's a complex matter and it requires action on a number of fronts. I would be delighted to see community leaders pick up on the issues and run with them. I just don't know the magic words that will make that happen.

Robertson: Thanks so much for sharing your time and your thoughts with us, Linda. Your message is not a "good news story" but it is certainly one that our communities need to hear and act on.

To listen to the Graff-Reed Conversations, or download the audio transcripts, visit the website at www.canadawhocares.ca.

For details on Graff's upcoming workshops, visit <http://www.volunteeredmonton.com/> or www.volunteercalgary.ab.ca. □

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Web Picks

Volunteerism around the world

by Lydia Baker

Idealist.org: Action Without Borders

Action Without Borders (AWB) members envision a world where "no opportunities for action or collaboration are missed or wasted." To that end, AWB's website, [Idealist.org](http://www.idealists.org), provides a hub of networks where people from all over the world can connect with other people, organizations, resources and thousands of nonprofit job and volunteer opportunities.

<http://www.idealists.org/>

International Association for Volunteer Effort (IAVE)

With representatives from all regions of the world, IAVE is involved in promoting, celebrating and strengthening volunteerism worldwide. Browse their website for international volunteer opportunities, a listing of conferences, conference papers, reports and the latest news from the voluntary sector. Also available on-line is IAVE's member newsletter in English, Chinese, Spanish and Catalan.

<http://www.iave.org/>

United Nations Volunteers

Promoting volunteerism throughout the world, "UN Volunteers" is active in 144 countries and each year

completes thousands of volunteer assignments involved in reducing poverty, fighting the spread of HIV/AIDS and fostering democracy. The UNV website features recent news and a variety of resources including statistics, articles on volunteerism and first person accounts from UN volunteers.

<http://www.unv.org/>

Lydia Baker is the RCVO's cataloguer and web coordinator.



Courses

Executive Leadership in the Non-profit Sector

Enhance your non-profit leadership career while you work

The program

Grant MacEwan College, through the new Executive Leadership in the Non-profit Sector post-diploma program, recognizes the trend in the non-profit sector towards greater collaboration and complexity. Through a part-time, hybrid program combining face-to-face and on-line learning, MacEwan has attracted students throughout Alberta. The seven course, 20-month program focuses on personal and collaborative leadership, organizational and community capacity building, human and financial resource development, governance and advocacy. It is a cohort-based program which encourages peer learning and relationships to support collaborative work in the community.

Who might be interested

Students in the program are often mature students working and volunteering in non-profit organizations in senior leadership roles. Others aspire to adding to their experience in the public and private sectors allowing for a transition to senior roles within voluntary/nonprofit organizations. Most are experienced in the sector and are building on diplomas and degrees, but a combination of education and experience is welcome. Students

currently working in the sector have found succession planning and career development discussions with their boards or senior staff useful in gaining financial and organizational support for furthering their education.

Financial assistance

Student financial assistance for the new program includes scholarships supported by the MacEwan School of Business. There will be ten \$1,000 scholarships available for first-year students. Students must be accepted into the program prior to June 30, 2008 to qualify. Training bursaries are offered by several foundations to qualifying applicants and many other funding resources are available to prospective applicants. Additional student funding information can be obtained at www.macewan.ca/leadership or by e-mailing macdonaldw@macewan.ca.

The next start date for the program is September 2008 and the college is currently accepting admission applications.

For further information go to www.macewan.ca/leadership, e-mail executiveleadership@macewan.ca, or contact the Curriculum Coordinator, Wendy MacDonald at 780-497-5267.

Information sessions

If you are interested in learning more about the Executive Leadership in the Non-profit Sector program, plan to attend one of the following scheduled information sessions:

- **Wednesday, January 30, 2008**
- **Wednesday, March 26, 2008**

Location:

Grant MacEwan College
City Centre Campus
10700-104 Avenue
Room 5-206
Edmonton, AB

Time: 6:00 p.m.

To Register:

Please e-mail Brigitte Rondeau, Program Advisor at rondeaub@macewan.ca or call 780-497-5534.

To confirm these sessions or for more information, please visit the program website at www.macewan.ca/leadership or call toll free at 1-888-497-4622, ext. 5268.

Learning Opportunities

Strengthening Volunteer Boards

Saturday, February 9, 2008
9:00 a.m. - 4:30 p.m., Room 5-137
Grant MacEwan College,
10700-104 Ave., Edmonton, AB

As a board member of a nonprofit organization, have you ever wondered ...

- What are my legal and ethical responsibilities?
- What role do I play in governing our organization?
- How can our board organize its work fairly and efficiently to avoid volunteer and staff burnout?
- How can we develop policies that will help us make consistent decisions?
- How can we encourage teamwork between the board and staff?

If you're a new board member wanting to learn more about your role, or an experienced board member wishing to enhance your skills and work effectively as a team member, this workshop is for you. Workshop content will focus on incorporated and nonprofit organizations and is not appropriate for advisory boards. Limit of three board members per organization please.

For registration call 780-497-4780 or voluntarysectorevents@macewan.ca.

RCVO NOTICE

- Watch for updates to our events on www.rcvo.org
- See our website for our On The Road Destinations this spring

“So What? Linking Research & Practice in the Voluntary Sector” 2007/2008 Series

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. Grant MacEwan College, in conjunction with the Resource Centre for Voluntary Organizations (RCVO) and TransCanada Pipelines, is once again offering a series of breakfast discussions, called the “So What?” series, aimed at increasing knowledge and dialogue about applied research with leaders of community organizations.

**Second Session: Anita Angelini—
Current Governance Revelations
and Impact on Practices**
Wednesday, March 12, 2008
**(Please note: date changed from
Feb. 6 to Mar. 12)**

**Third Session: Karen Bruce—
Transitions: the Art of
Implementing Positive Change**
Wednesday, April 3, 2008

**Time and Place: 8:30-10:30 a.m.,
Room 6-313H, Grant MacEwan
College, 10700-104 Ave.,
Edmonton, AB**

For information on the series call 780-497-4780 or e-mail voluntarysectorevents@macewan.ca

Fundraising Success: Where to Start and How to Build It!

Saturday, March 8, 2008
Grant MacEwan College
10700-104 Ave., Edmonton, AB

Achieving success takes resources! Are you raising funds in a small organization; or starting a new fund development program; or just

learning the basics? Then this workshop is for you. Come and explore the answers to key questions on regulations, the people needed on your development team, the right tools to use, and how to compete with high profile campaigns.

This workshop was created with the support of TransCanada Pipelines to create awareness, build confidence and provide resource materials and sources for further learning with regards to fundraising programs.

Registration information and form at www.rcvo.org—click on events—or call 780-497-4780 or e-mail voluntarysectorevents@macewan.ca.

Board Leadership: Ideas Into Action 2008 Conference

Saturday, March 29, 2008
Grant MacEwan College
10700-104 Ave., Edmonton, AB

Mark your calendar!

This conference is focused on board members of voluntary/nonprofit organizations and will have a variety of sessions addressing the needs of both beginner and experienced board members.

Visit the Board Leadership 2008 page at <http://www.ecvo.ca/boardleadership2008.html> to find out more, including registration details and Frequently Asked Questions.

The site will be updated regularly with new information on the event.

The Lobbyists Act: Lessons learned

Excerpts of a speech delivered by Robert Wyatt of The Muttart Foundation

Synopsis by Lyndsey Ford



“We won”, Bob Wyatt told his audience during a November luncheon speech for the Alberta Association of Fund Raising Executives (AAFRE). Wyatt, Executive Director of The Muttart Foundation, was talking about the controversial *Lobbyists Act*.

Bill 1 of the *Lobbyists Act* was introduced by Premier Ed Stelmach in the Legislative Assembly March 7, 2007. The complex, broad and extensive legislation would have required nonprofit organizations to dedicate significant time and resources to tracking and reporting communication with all government officials—even everyday conversations with public officials. “Any discussion about a policy or even a guideline was going to be considered lobbying,” Wyatt explained in his speech.

After a Second Reading in the Legislative Assembly, Bill 1 was forwarded to the Standing Committee on Government Services. Subsequently, the Standing Committee announced an interest in receiving input from Albertans. The Muttart Foundation and others made presentations at the Standing Committee’s public hearings in September.

The Standing Committee considered the input at their October meetings, making recommendations to the Legislative Assembly in early November.

“...as five people from the voluntary sector sat in the gallery of the Alberta Legislative Assembly, the government announced that it would exempt “public-good” not-for-profits from the provisions of the *Lobbyists Act*...I have to tell you that hearing that announcement felt pretty good” Wyatt shared with the AAFRE audience.

Instead of talking about the different aspects of the *Lobbyists Act* that are no longer relevant, he decided to discuss why things developed the way they did and what was learned or can be learned from the experience. He broke it down into three major lessons for the voluntary sector.

Lesson one: We don’t track government actions as well as we should.

Wyatt emphasized organizations do a great job reviewing Bills for issues related to their focus. However, they don’t necessarily have the time to look for or analyze a Bill that will have an effect on voluntary organizations in general. “That’s a specialized skill and one that we need,” he told his audience.

“The Edmonton and Calgary chambers of voluntary organizations are important in this issue but they too have their limits. They do not have the resources of similar bodies that serve business. That is an issue for funders but it is also an issue for sector organizations. If these umbrella groups are to perform the functions they are capable of, that we need them to perform, more organizations must join and become active members.

These organizations, like all of ours, rely on volunteers. None of us have enough time to do all of the things we

need to do,” he reaffirmed. “But as we’ve learned from our experience with the *Lobbyists Act*, if we do not make the time to do these things, we’re going to find ourselves with more problems like the *Lobbyists Act*.”

Lesson two: Government doesn’t understand us

Government doesn’t understand how the sector works he explained. Wyatt also feels there is a lack of understanding of the role the sector plays in the province. “I am not convinced that politicians, or the general public, are aware that the sector is part of the critical infrastructure of Alberta. I have argued in the past that if the voluntary sector in Canada shut down for 24 hours, the country would come to a standstill. That holds as true here as anywhere.”

Wyatt argues the lack of government and public awareness is due to a lack of self promotion. “We do not explain who we are or what we are,” he told the audience. “We laugh or shake our heads at misconceptions and myths, but we do precious little to explain ourselves.”

Lesson three and the most important lesson: We don’t understand our own potential to influence change

“What the sector accomplished is, to put it mildly, amazing,” he began. “We led to a fundamental change in the signature Bill of a new premier. We persuaded the Government of Alberta that we have a unique role that would have been harmed by making us subject to the *Lobbyists Act*.”

Wyatt says, while the voluntary sector will never speak with one voice it seems to have gone too far in the opposite direction in fear of what he calls “group-think”.

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“When I’m talking with people from the provincial or federal governments, I’m often told that they get so many disparate, and even contradictory, requests from voluntary sector organizations that they are left without the ammunition to make a case.”

“We need not seek unanimity.” Wyatt confirmed. “But we must seek possibilities of discussion, of learning, of supporting one another even when we are not directly affected...and then we must connect to other cities, to other provinces, to marshal the forces of the voluntary sector.”

Wyatt says the accomplishments demonstrated in working together against the *Lobbyists Act* shows the sector has power. “I emphasize the words working together. People from the sector talked with their MLAs about the Bill and close to 200 organizations signed a joint submission about the problems that would be caused. It is this joint effort that’s the success to be celebrated. For it was only in working together that we had a loud-enough voice to attract attention in the highest offices in the province,” he said of this powerful and cohesive action.

The original topic of Bob Wyatt’s speech to AAFRE members was the

implications of the *Lobbyists Act*. The amendment left Wyatt without a basis for his speech; however, the lessons learned left plenty of valuable insights. □

Lyndsey Ford is the event planner at the RCVO. She can be reached at ford13@macewan.ca.



Changing faces – Could you be a victim of identity theft?

co-authored by
Thelma Ketler
and Lyle Falk



We’ve often heard the saying “an ounce of prevention is worth a pound of cure”. This saying is particularly relevant when it comes to the prevention of identity theft and identity fraud. Millions of dollars are lost every year in Canada due to identity theft. In 2006, PhoneBusters, the Canadian Anti-fraud call centre, heard from 612 Albertans who were victims of identity theft. Their losses totaled \$1.4 million. These are the reported statistics; the actual numbers would be much higher.

Identity theft is a crime. Thieves acquire personal information that belongs to other individuals and use it without the owner’s knowledge or consent to commit fraud for financial gain or for another criminal purpose.

Victims of identity theft often discover that something is wrong when bills don’t arrive, they are turned down for a loan or mysterious purchases show up on their monthly credit card statements. Once victims discover the crime, they dedicate countless hours of their time and emotional energy to reclaiming their good name.

Preventing identity theft means putting as many barriers as possible between you and an identity thief. Most people take care to keep a tight hand on their credit card knowing the obvious risks of it falling into the wrong hands, but identity thieves look for all types of personal information to carry out their crimes. This includes everything from names, addresses, age and gender to information about employment and professional credentials; identifying numbers like birth certificates, social insurance numbers and passports; and financial information like bank statements, utility bills and payment records.

Service Alberta offers the following suggestions to protect your personal information:

- Ask questions before you give out personal information. Know who you are giving information to and how it will be used. If you are not confident with how the information is going to be used, then do not provide the information.
- Protect your computer by using complex passwords.
- Do not leave your laptop or other electronic data storage devices in your vehicle.
- Add passwords to all electronic tools – including cell phones and electronic organizers that store personal information.
- Shield your personal identification number (PIN) and passwords. An identity thief will be more motivated to steal your documents and credit cards if they already know the secret to accessing your accounts.
- If you conduct business or social contact that shares personal or

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financial information over the Internet use secure transaction sites. Look for a lock or unbroken key on the transaction page.

- Carry a minimum amount of identification documents with you. Items including your social insurance card and personal cheques are best left at home under lock and key.
- Keep your eye on your credit card. Giving your credit card away for even a few moments can provide an opportunity for a thief to record your name and account number or to electronically scan information from your card.
- Keep receipts of all credit card transactions. Compare your receipts to your statements and report any unauthorized purchases to your credit card issuer.
- Order a copy of your credit report at least once a year to be certain that no new accounts have been opened in your name.
- Protect your mail. Identity thieves search mailboxes for financial statements, utility bills and unsolicited credit offers. If you will be away from home, Canada post has a hold-mail service that enables customers to stop delivery.
- Buy a shredder and use it. Turn personal information into confetti before it reaches the garbage or recycle box.
- Know how to contact your credit card companies and financial institutions if your documents are lost or stolen.
- Secure all personal documents in a safe. Anyone who can access your premises or vehicle could easily locate items you have hidden.

The Alberta government and the Edmonton Police Service recently released an education kit to help Albertans spot and prevent identity theft. The *Changing Faces* kit includes an 18-minute fact-based drama, a presenter's guide, poster and take-home activities to help program participants apply the prevention strategies to their own personal situations. *Changing Faces* is available free of charge to organizations interested in presenting information sessions to staff or community groups. To order a kit, call Service Alberta toll-free in Alberta, 1-877-427-4088 or in Edmonton dial direct, 427-4088. The RCVO also has kits to borrow.



What should you do if you are a victim of identity theft?

If you suspect that your personal information has been stolen and misappropriated to commit fraud or theft, take action immediately and keep a record of your conversations and correspondence. The following basic actions are appropriate in almost every case.

- Start a log of dates, person(s) that you spoke with and exactly what they said.
- Contact each of the two major credit bureaus. Request that a

"Fraud Alert" be placed in your files. At the same time order copies of your credit reports.

- [Equifax: 877-323-2598](tel:877-323-2598)
- [Trans Union: 877-525-3823](tel:877-525-3823)
- Contact the fraud department of creditors for any accounts that have been opened or tampered with fraudulently. This may include credit card companies, phone companies, banks and other lenders.
- File a report with your local police service or the police service in the community where the identity theft took place.
- Contact PhoneBusters National Call Centre 1-888-495-8501. PhoneBusters is a central source for all pertinent information on identity theft. They use the information they gather to identify trends and patterns and to assist law enforcement agencies in possible investigations.

Businesses and voluntary sector organizations have additional responsibilities for protecting not only their own personal information, but also the information entrusted to them by clients, staff and volunteers. The federal-provincial-territorial Consumer Measures Committee offers a valuable resource to assist organizations in establishing best practices for handling personal information. The *Identity Theft Kit for Business* tool kit addresses issues associated with collection of personal information; storage of data; controlling access to personal information; and communication approaches in the case of a breach. This kit along with other consumer information and tip sheets are available on Service Alberta's website at www.servicealberta.gov.ab.ca. □

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Character in fundraising— principle number seven: Be socratic

by Roger Breault



This article, Be Socratic, is the last 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.

Socrates, the father of Western philosophy, is often considered one of the wisest that ever lived. He founded a school of philosophy whose principles of enquiry continue to shape the manner in which we think, gain ken, advance as a community and as individuals within it.

Socrates was not a man of great artistic talent; he was not an Olympian; he was not a smart business success; he was not even good looking. He was a simple man. As Cicero aptly coined: “Socrates brings philosophy down from the clouds and makes it commonplace.” Socrates rightly stated: “An unexamined life is not worth living”. Socrates was gregarious; his humor was infectious and he acknowledged that everyone had something to teach us including slaves and women. His seven principles mirror the seven character traits exposed in this series of articles. They are: Know yourself, Ask great questions, Think for yourself, Challenge convention, Grow with friends, Speak the truth and Strengthen your soul.

As a fundraiser, are you asking the right questions? What are they? Are the values espoused by my charity truly mine? What’s the best method to achieve objectives? Am I constantly learning from others to become effective at my work and in my personal life? Is my resolve to accomplish my fundraising objectives coming from within? Do I have the courage of my convictions?

If you can affirm that answers to these questions are changing daily, you are probably on the right path. By definition, you are questioning yourself and those around you about fundamentals to arrive closer to the truth about you and your cause. This form of inquisition demands a sense of detachment doesn’t it?

One of the best ways to gain a detached perspective is humor. If you were the manager of a muffler shop, a sign in front of your business might read: “No appointment necessary, we can hear you coming”; a plumber’s: “Let us repair what your husband fixed.” If you were an obstetrician, the sign on your front door might read: “Push, Push Really Hard”. A criminal lawyer’s sign might state: “I have knowingly defended a number of guilty men. But the guilty never escape unscathed. My fees are sufficient punishment.”

What greeting can you post at the entrance to your office to describe your feelings and approach? I hope it indicates that you do not take yourself too seriously. It can be a way to show that you have a Socratic perspective. It might read: “Give me all you’ve got” or “My guess is liable to be as good as anyone else’s”. Here is a saying that might apply: “Take my advice, I’m not using it right now”; finally, consider choosing one of these two caution signs: “I get 100% of what I don’t ask for”; or “Beware, I appeal to noble motives.”

When you look at your net worth, you are looking at your consolidated

statement. When you look at your value to an organization, what does your consolidated statement look like? Are you a net contributor? Don’t just look at the money you bring in, do you add value by questioning practices and helping colleagues and yourself discover the truth?

As fundraisers, we are constantly performing “size-ups” of our organizations, aren’t we? Where do we fit into the philanthropic marketplace? How can we modify methods of solicitation to achieve or exceed objectives? How can we improve the systems? Socrates would tell you point blank: “Conduct periodic “size-ups” of yourself too!”

To feel comfortable as a fundraiser, you want to conduct your activity with alacrity and felicity. This will be accomplished with aplomb when you adopt a Socratic disposition. It will guarantee that you will be consistently on the learning curve, it will force you to scrutinize your values and to improve your fundamental (previously examined) character traits as a successful fundraiser: “Intelligence, Fervency, Self-Confidence, Direction, Efficiency and Persuasiveness”.

A Short List of Selected Readings on the Subject of Be Socratic in Fundraising

Cousins, Norman, *The Anatomy of an Illness*

Frankl, Viktor, *Man’s Search For Meaning*

Gross, Ronald, *Socrates’ Way*

Kerr, Michael, *You Can’t be Serious, Putting Humor to Work*

Phillips, Christopher, *Socrates’ Cafe*

Roger Breault is a private fundraising consultant and manager of Fund Raising Consultants of Alberta. He can be reached at 1-866-420-3338, toll free or 780-455-3338.

BOOK REVIEW



Volunteer Management: Mobilizing all the Resources of the Community 2nd edition

by Steve McCurley and Rick
Lynch
HN 49.V64M35 2006

This long standing reliable guide to volunteer management has been recently updated. Topics range from planning the volunteer program, creating motivating volunteer job descriptions, recruitment, supervision volunteer staff relations and program evaluation.

Highlighted throughout are insightful quotes by practitioners and consultants in the field. There's also an extensive bibliography, resource list, sample volunteer management policies, and numerous forms and worksheets.

Simply put, this is a great reference tool for all volunteer managers.

To borrow this book from the MacEwan Library, contact Michelle Bezenar, Interlibrary Loans, phone 780-497-5857, e-mail: bezenarm@macewan.ca or call the RCVO at 780-497-5616.

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