



## BROADENING PHILANTHROPY IN ONTARIO'S COMMUNITIES

Date: February 10, 2004

Re: *Broadening Philanthropy in Ontario's Communities*  
Project Update

The following is an update on the progress of the *Broadening Philanthropy in Ontario's Communities* project, funded through a province-wide grant from the Ontario Trillium Foundation.

There are six initiatives in this project, each with its own lead consultant and Advisory Group, comprised of staff and volunteers from Ontario community foundations:

1. Engaging Ontario's Youth
2. Strengthening Relationships with Professional Advisors
3. Policy Guidelines and Template Development
4. Community Outreach and Dialogue
5. Neighbourhood Grantmaking
6. Working with the Media

The research, development and piloting of the first three initiatives are complete and the tools which were developed are currently being designed, translated and produced. **Tools and materials developed for these three initiatives will be distributed to Ontario CFs during a one day orientation and training session** which will be held in two locations: March 30, 2004 in Cambridge, ON and April 1<sup>st</sup>, 2004 in Kingston, ON.

The last three initiatives are in the development and piloting/testing stage and will be distributed in Fall 2004. Below is a brief synopsis of each of the six initiatives:

### 1. Engaging Ontario's Youth

- Two province-wide workshops held for youth and adult advisors from emerging and existing Youth Advisory Councils (YACs) or youth engagement programs. Over 50 youth and adult advisors representing 12 Ontario community foundations attended these workshops. Sessions included: "Adult Youth Partnerships"; "Building a Youth Program and Youth Toolkits"; and "Community Youth Development Models".

- Three animated, referenced Toolkits developed to assist community foundations in undertaking youth engagement programs:

**Youth Toolkit** – nine modules designed for youth with practical suggestions and examples to guide them in working with their community foundation:

- What is Youth Philanthropy?
- Running a Meeting
- Who are We? And Why are We Here?
- Working Your Plan
- Mapping the Assets in Your Community
- Making Connections
- You are the Change Agent
- Fundraising and Endowment Building
- Telling Your Story

**Board Toolkit** – three modules designed for Board members to determine their community foundation's state of readiness for engaging youth:

- Engaging Youth: Why?
- Guiding Principles for Youth Engagement
- Engaging Youth: How?

**Adult Advisor Toolkit** – designed as a companion piece to the Youth Toolkit it provides guidelines and facilitated techniques for adult advisors working with youth

- All three of these tools will be distributed to Ontario community foundations as part of an orientation session in March 2004. They will also be featured at the Youth in Philanthropy workshop at CFC's national conference in May 2004.
- Substantial funding is being provided to youth delegates from Ontario community foundations to attend the Youth in Philanthropy workshop and CFC's national conference in May 2004. Further details will be in the conference registration package.

## 2. Strengthening Relationships with Professional Advisors

- Developed a **web-based Resource Manual** that will provide professional advisors with gift planning resources; community foundations with an effective Board education tool; and actively promotes the benefits of a community foundation. Contents include:
  - Role of the Professional Advisor
  - Charitable Gift Planning Opportunities
  - Planned Disposition of Highly Appreciated Securities
  - Need to Generate Income for Self or Others
  - Effective Estate Planning

- Philanthropic Planning Opportunities
  - Case Studies – Real Life Examples
  - Charitable Planning Resources
- Developed an **Orientation Program** to familiarize staff, Board and volunteers with the skills needed to establish, cultivate and maintain effective relationships with Professional Advisors in their communities. Session training includes:
- Understanding the Relationship with Advisors
  - Preparing for Contact
  - Introducing the Gift Instruments
  - Setting up the Personal Visit
  - Securing Commitment
  - Ongoing Cultivation and Stewardship of the Professional Advisor Relationship
- The Resource Manual will be introduced to Ontario community foundations in March 2004 during an orientation session that will familiarize users on how to access the web-based resource. Printed copies will be distributed. The training session on building effective relationships with professional advisors will be held in Fall 2004.

### 3. Policy Guidelines and Template Development

- This tool is comprised of a comprehensive overview of the policies community foundations require and provides Board members with key questions to consider in developing policies consistent with their model of governance. Included are over 40 policies and templates addressing functions such as:
- Governance
  - Financial Management
  - Donor and Gift Management
  - Grant Management
  - Human Resources
  - Community and Volunteers
  - Fund Agreement Templates
- These policies and templates will be distributed to Ontario community foundations in March 2004. They will also be available at CFC's national conference in May 2004.

### 4. Community Outreach and Dialogue

- This project has taken an innovative approach to engaging diverse communities through a grantmaking outreach activity. A “**Ten Step Diversity Initiative**” is currently being piloted in two Ontario community foundations. A final version of that step by step guide and workbook, media materials, a paper on convening and training tools will be available in the Fall of 2004. Learnings from this project will be presented at CFC's national conference in May.

## 5. Neighbourhood Grantmaking

- Research is currently underway to determine best practices from existing neighbourhood grantmaking projects. This tool will consist of a workbook, training materials and peer networking to assist community foundations in using neighbourhood grantmaking as a vehicle to promote community philanthropy. These tools will be available in Fall 2004.

## 6. Working With the Media

- Tools being developed include a series of matte stories on philanthropy; templates for a monthly newspaper column; and a training session on how to engage local media. Currently research is being conducted in a pilot community on measuring public awareness of community foundations and identifying marketing effectiveness. These tools will be disseminated in Fall 2004.

All of the tools developed for this project will be available in both English and French. While these products were created specifically for Ontario community foundations, through a grant from the Ontario Trillium Foundation, CFC plans to adapt the tools, where necessary, for dissemination to all Canadian community foundations. We are also exploring how some of the products can be adapted for use by other voluntary sector organizations.

Thank you to all the community foundations who have so readily volunteered to be a pilot test site or loan us staff and volunteers to sit on Advisory Groups. As well, recognition and thanks go to the *Broadening Philanthropy in Ontario's Communities* Project Team, which includes consultants Nancy Johnson, Elinor Humphries, Jane Neath, Ian Fraser, Sue Peterson and staff resources Amy Shantz and Cindy Lindsay, who together have created the means to actualize our shared vision for this project.

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