

April 2004

# Towards a new partnership for community building

A report from the  
Private/Voluntary  
Sector Forum



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**Canada**

This report presents a summary of the findings of the Private/Voluntary Sector Forum on the role of public policy in creating an enabling environment for private/voluntary sector relationships and partnerships to build community capacity. The recommendations made in this report are a summary of ideas put forward through the forum, as interpreted by the principal authors of this report. They do not necessarily represent the views of all participants in the forum, the forum steering committee or its organizations.<sup>1</sup>

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Imagine is the Canadian Centre for Philanthropy's national program to promote public and corporate giving, volunteering and support for the community. It is the only program in Canada that is specifically geared to encourage and promote partnerships between the corporate and charitable sectors. Imagine develops standards for corporate citizenship and philanthropy that are realistic and credible for both corporations and the community and is internationally recognized as a world leader in the promotion of philanthropy and corporate citizenship. For more information, please visit <http://www.imagine.ca>.

The Public Policy Forum is a non-partisan, nonprofit organization aimed at improving the quality of government in Canada through better dialogue between the public, private and voluntary sectors. The Forum's members, drawn from businesses, federal and provincial

governments, the voluntary sector, and the labour movement, share a common belief that an efficient and effective public service is a key element in ensuring our quality of life and global competitive position.

Established in 1987, the Public Policy Forum has gained a reputation as a trusted, neutral facilitator, capable of bringing together a wide range of stakeholders in productive dialogue. Its research program provides a neutral base to inform collective decision-making. By promoting more information sharing and greater linkages between governments and other sectors, the Public Policy Forum ensures that Canada's future directions become more dynamic, coordinated and responsive to the challenges and opportunities that lie ahead. For more information, please visit <http://www.ppforum.ca>.

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A New Spirit of Community  
Un nouvel esprit communautaire

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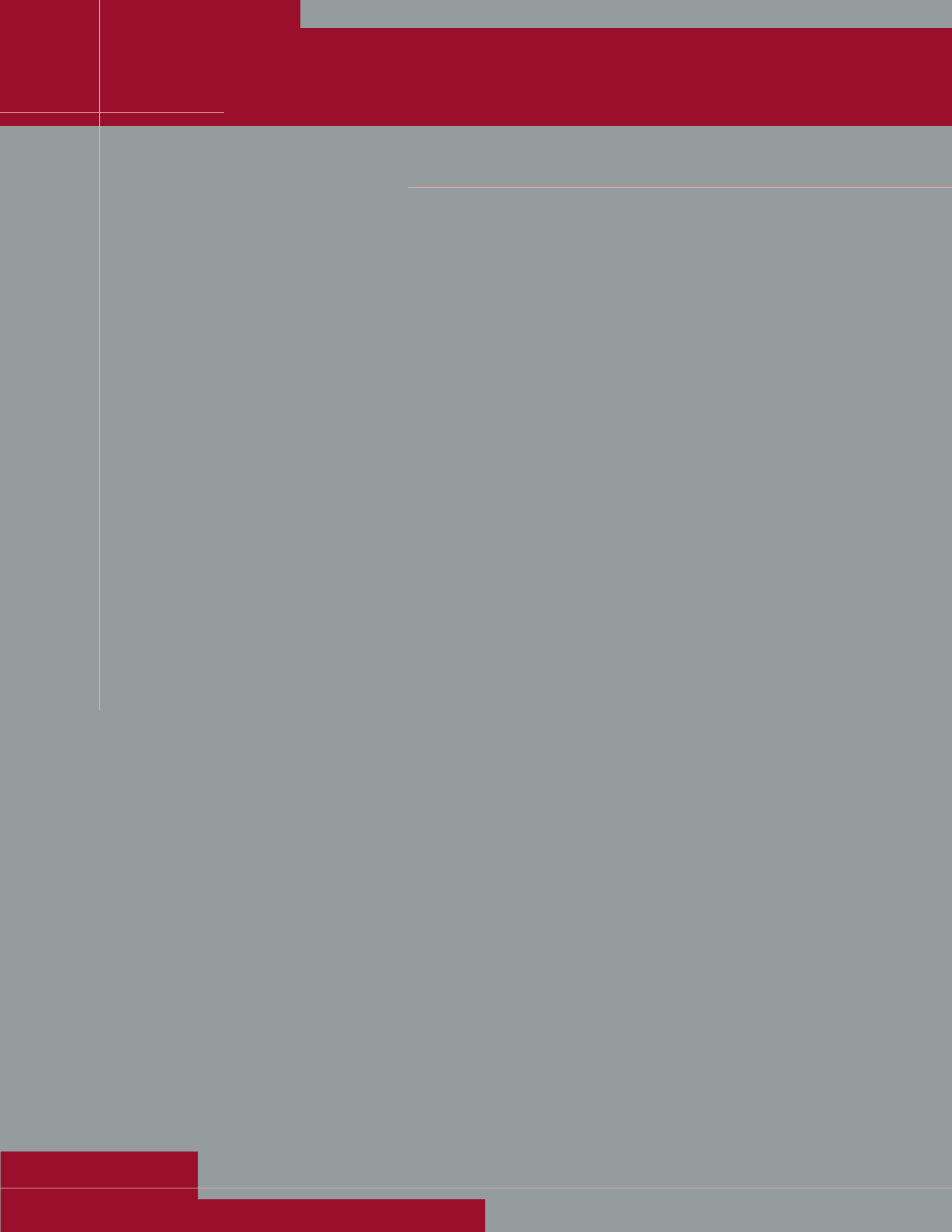
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<sup>1</sup> See Appendix A for a list of Participants in the Private/Voluntary Sector Forum and Steering Committee.



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# EXECUTIVE SUMMARY

The Private/Voluntary Sector Forum was launched in 2001 by the Imagine program of the Canadian Centre for Philanthropy. It was designed to bring together the private and voluntary sectors to develop a framework for working together more effectively in building communities and strengthening collaborative partnerships.

In 2002, Imagine, in partnership with the Public Policy Forum and The Conference Board of Canada, received support from the Sectoral Involvement in Departmental Policy Development program of the Voluntary Sector Initiative to conduct research and hold consultations on what measures the federal government could take to better support and encourage private/voluntary sector collaboration in community building. This document collects and presents the information resulting from that process. It includes key findings from the research and a set of summary recommendations for government based on consultations with key voluntary and private sector stakeholders.

## Research Findings

This research, along with ongoing discussions of the Private/Voluntary Sector Forum, shows that effective private/voluntary partnerships and better cross-sector coordination in community development has the potential to become an important contributor in building Canadian communities and renewing Canada's social foundation. Our research identified a wide range of highly effective business-voluntary sector-community partnerships across Canada, a number of which are profiled in this report. These partnerships are successfully working in communities to tackle issues such as poverty, homelessness, palliative care, and helping children in need of support. The research identified a number of best practices and critical success factors, but it's clear that much remains to

be done to encourage more of these partnerships. The main findings were:

- 1. Private/voluntary sector partnerships can help both sectors increase the impact of their contributions to community.** Partnerships can also be an important source of innovation and can lead to more effective and efficient ways to deliver social goods and services and to address systemic challenges such as poverty. Partnerships can also increase the contribution of business to community building by leveraging a broad range of supports beyond simply philanthropic donations.
- 2. Governments have a key role to play in supporting this innovation.** They can create an environment that will encourage and enable greater corporate community investment and engagement, and help build the capacity of both sectors to work collaboratively.
- 3. Canada lags behind other countries, such as the U.K., in creating an integrated policy framework to encourage and support these new forms of collaboration and to stimulate greater corporate investment in community development and the social economy.<sup>2</sup>**

## Recommendations

### Building Stronger Communities through Private/Voluntary Sector Partnerships and Private Sector Community Investment

The Private/Voluntary Sector Forum recommends that the government implement an integrated public policy initiative (the Community Partnership Initiative)<sup>3</sup> to encourage and support private/voluntary sector partnerships for community building and greater private sector investment in the community.

<sup>2</sup> The term 'social economy' is used in this paper to refer to a broad variety of cooperative, voluntary and nonprofit organizations and enterprises that support community development and provide social goods and services.

<sup>3</sup> The Community Partnership Initiative is suggested as a working title for this initiative.

In a similar manner to the Voluntary Sector Initiative, the government should support this initiative through a combination of reforms to existing regulatory and policy mechanisms, and provision of additional funding for collaborative undertakings and capacity building. This initiative should be supported across government and delivered through appropriate government departments and funding bodies.<sup>4</sup>

A preliminary estimate of the resources needed to support the full implementation of these recommendations is in the range of \$100 million over five years, \$50 million of which has already been allocated in the 2004 federal budget. Assuming a modest 3–5% increase in cash and in-kind contributions from companies as a result of this initiative over the same period, this would generate a potential net increase of \$150–\$250 million in private sector community investment.<sup>5</sup> In addition, the impact and effectiveness of this investment will be significantly enhanced through the policies contained in this proposal to support private/voluntary sector partnerships. The Community Partnership Initiative should support the following four objectives:

**1. Stimulate and support dialogue, knowledge sharing and private/voluntary sector collaboration for community support and development**

- Create a multi-sector National Roundtable on Community Partnerships to provide leadership and guidance to the Community Partnership Initiative and to monitor and assess its impact.
- Provide support for regional intermediary organizations to improve cross-sectoral coordination and understanding at the local level.
- Stimulate and encourage innovation in private/voluntary sector partnerships through public recognition such as awards and media awareness programs.
- Improve the effectiveness of federal government support for community partnerships through more effective inter-departmental coordination and delivery of support programs.

**2. Encourage and support research and knowledge development**

- Improve knowledge and understanding of the role, capacity and potential of the voluntary sector to support communities.
- Improve knowledge and understanding of the role, capacity and potential of the private sector to support communities.
- Improve knowledge and understanding of the value, impact and potential of new forms of cross-sectoral collaborative approaches to community development and support.

**3. Build the capacity of the voluntary and private sectors to work in partnership**

- Provide support for an on-line information and resource centre that would collect and disseminate information on building successful cross-sectoral community partnerships.
- Provide support for the development and delivery of training resources to help both sectors increase their capacity to build effective cross-sectoral community partnerships.
- Provide grants and contributions to support innovative cross-sectoral community development initiatives.
- Create a new seed capital fund to support the development of nonprofit social enterprises.
- Give nonprofit social enterprises improved access to other forms of financial and technical assistance that are available through existing federal government financial support programs aimed at the private sector.

**4. Encourage greater private sector community investment through legal and regulatory reform**

- Provide better recognition for corporate charitable gifts.
- Explore other financial instruments, such as community investment tax credits, to encourage greater corporate community investment.

A provisional summary budget for implementing these changes is appended.<sup>6</sup>

It is hoped that these recommendations will serve as a basis for further discussion between government and the private and voluntary sectors about how public policy can reinforce and support collaboration across all three sectors for the purpose of strengthening Canadian communities.

*“With thousands of Canadian charities seeking corporate help, and with increasing public scrutiny of corporate operations, both sectors have to learn how to create partnerships that achieve some of what governments used to do. Corporations have to help non-governmental organizations create a higher quality of life and NGOs can help corporations not only do good, but be seen to be doing so.”*

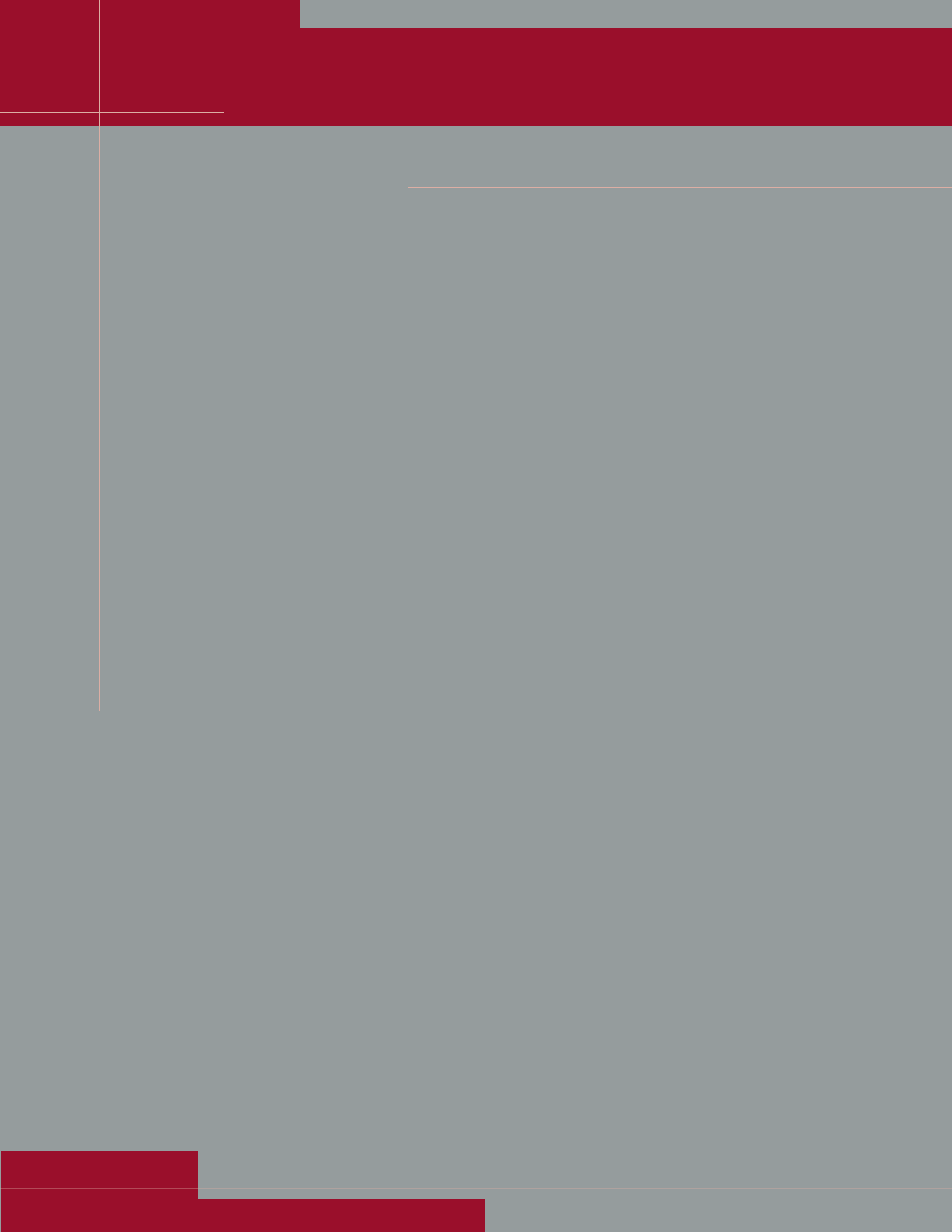
**Roger Martin, Dean, Rotman School of Management, University of Toronto**

<sup>4</sup> Key departments include Social Development Canada, Human Resources and Skills Development Canada, Canadian Heritage, Industry Canada, Finance Canada, the Canada Revenue Agency and related government-funded foundations such as The Canada Foundation for Innovation.

<sup>5</sup> Reported corporate donations in 2000, the last year data was available, was approximately \$1 billion.

<sup>6</sup> This budget is presented for illustrative purposes only. The scope of work undertaken through this project did not provide for a detailed analysis of all costs associated with the full implementation of the recommendations.





# THE PRIVATE/VOLUNTARY SECTOR FORUM

The Private/Voluntary Sector Forum was launched in 2001 by the Imagine program of the Canadian Centre for Philanthropy. It brings together leaders from the private and voluntary sectors to discuss the challenges and issues of cross-sectoral collaboration. Its goal is to increase understanding of cross-sectoral collaboration and develop a framework that will foster and facilitate partnerships.

The first Private/Voluntary Sector Forum meeting was held on June 15, 2001, in Toronto. Two key themes emerged from the meeting and shaped the subsequent focus of the forum. The first theme, "Building a Framework for Deeper Dialogue," centred on the concepts of vision, stories and deeper dialogue. The second, "Building an Enabling Environment," addressed practical barriers to progress.

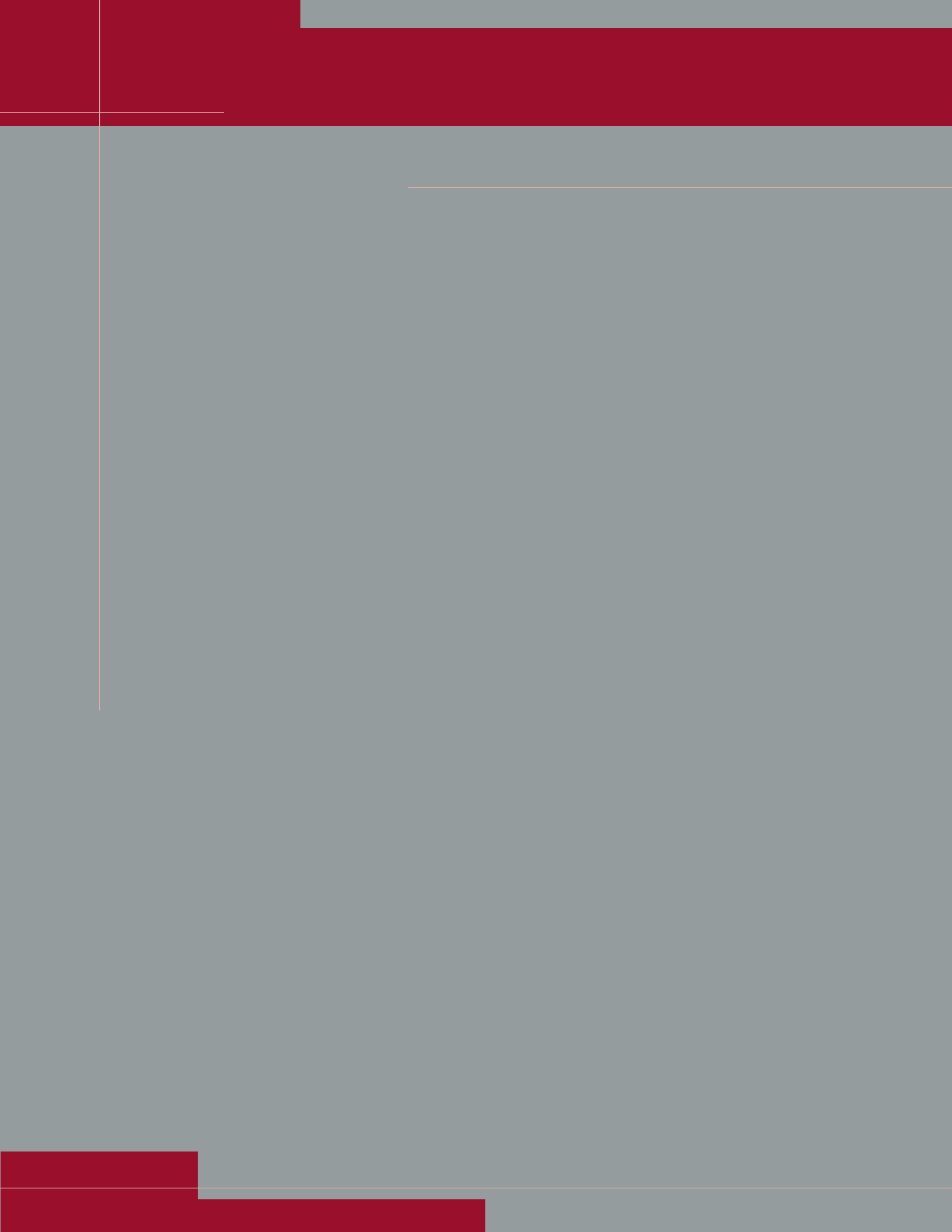
In 2002, Imagine, in partnership with the Public Policy Forum and The Conference Board of Canada, applied for and received support from the Sectoral Involvement in Departmental Policy Development program of the Voluntary Sector Initiative to conduct research on

how public policy can be used to enable collaboration for community development. This included research into current national and international trends in private/voluntary sector partnerships and the role of governments in enabling and encouraging these forms of intersectoral collaboration.

Forum participants reviewed the research results and then began work on a series of recommendations for government. The recommendations included in this report are the product of this work. They are designed to create a basis for an integrated public policy strategy by the federal government. This strategy will encourage and support the development of more effective cross-sector collaboration and partnership for community building.

*"All charities can use cash but I think a lot of them want time and energy, minds and hands. What we try to do is find a balance. Some of it is cash, some is in-kind giving, some of it is our people's time. Companies want to get more creative about how they're supporting the community."*

Hazel Gillespie, National Community Investment Manager, Petro-Canada



# THE CURRENT CONTEXT FOR PRIVATE/VOLUNTARY SECTOR RELATIONS

## **Both the private and voluntary sectors are increasingly expected to take more responsibility for community development and social issues.**

In response to the pressures of globalization and economic restructuring, governments in Canada have dramatically reduced their role in providing and supporting community and social services over the past two decades. Though overall program spending has increased in recent years, support for community services continues to fall. This decline is increasing the strain felt by Canadian families and communities, and drives a search for new ways to support Canada's social infrastructure.

*“Diminishing resources, exacerbated by government cuts and fierce competition for fundraising dollars, have left hundreds of small and midsize charities struggling for survival.”*

**Mohammed Adam, “Banking on an Uncertain Future” The Ottawa Citizen, March 4 2004.**

Canadians are turning to the private and voluntary sectors to replace lost government support. Canadians' expectations with regard to corporate social responsibility and community investment are now among the highest in the world. Their expectations of and demands on nonprofits and charities have also soared.<sup>7</sup>

## **Canadians' expectations exceed the capacity of both sectors.**

Canadians' expectations are placing demands on both private and voluntary sector organizations that far exceed the capacity of these organizations to respond. In need of sustainable revenue to increase their capacity, voluntary organizations are turning to the private sector. As a result, companies are receiving thousands of requests each year, which greatly exceed the limited resources available through traditional mechanisms such as corporate philanthropy.

## **To build capacity and meet public expectations, the private and voluntary sectors are beginning to explore new ways of working together.**

For the voluntary sector, new ways of working together means leveraging new resources beyond simply philanthropy. For the private sector, it means managing relationships with communities and society in order to achieve public visibility, engage employees, and provide measurable benefits to the company.

In leadership companies, pure philanthropy is being replaced with a more integrated and strategic community investment approach. This model uses a variety of corporate resources from philanthropy to employee volunteerism to create programs that can generate real benefits to the community, their nonprofit partners and the company. A “business case” for community investment is emerging and is being supported by leading business thinkers. Michael Porter argues in his article “The Competitive Advantage of Corporate Philanthropy” that business should invest in its “strategic” context in order to ensure that the communities in which it operates can attract and retain high value employees and customers.<sup>8</sup>

<sup>7</sup> Brown, M., McKeown, L. (2003). “Building Stronger Communities: Business and Voluntary Sector Organizations Working Together”, Toronto, Imagine, Canadian Center for Philanthropy.

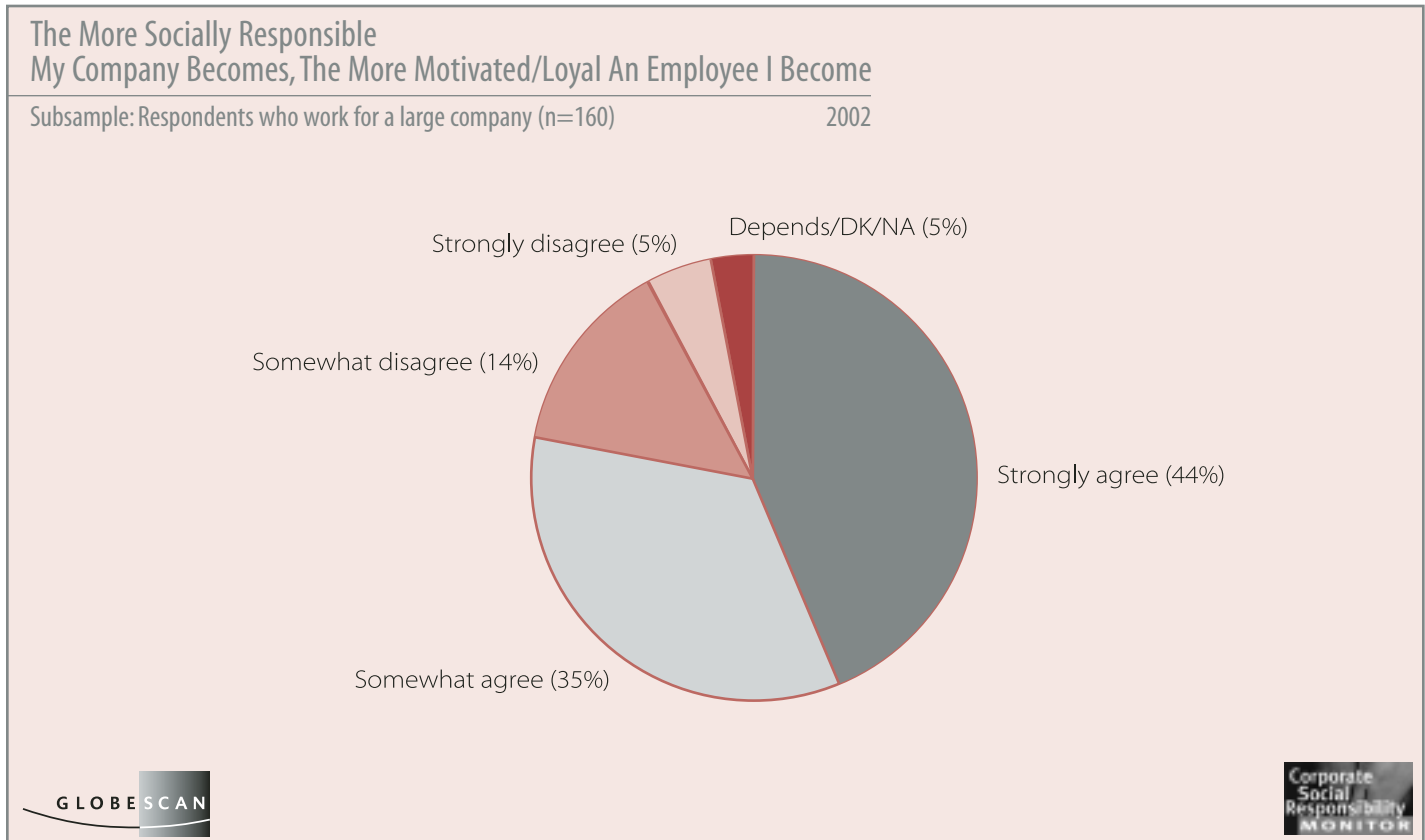
<sup>8</sup> Michael Porter, December 2002. “The Competitive Advantage of Corporate Philanthropy.” Cambridge, Harvard Business Review.

**New forms of private/voluntary sector collaboration are a source of innovation. They can lead to new approaches that more effectively deliver social services and find new ways to address systemic social challenges.**

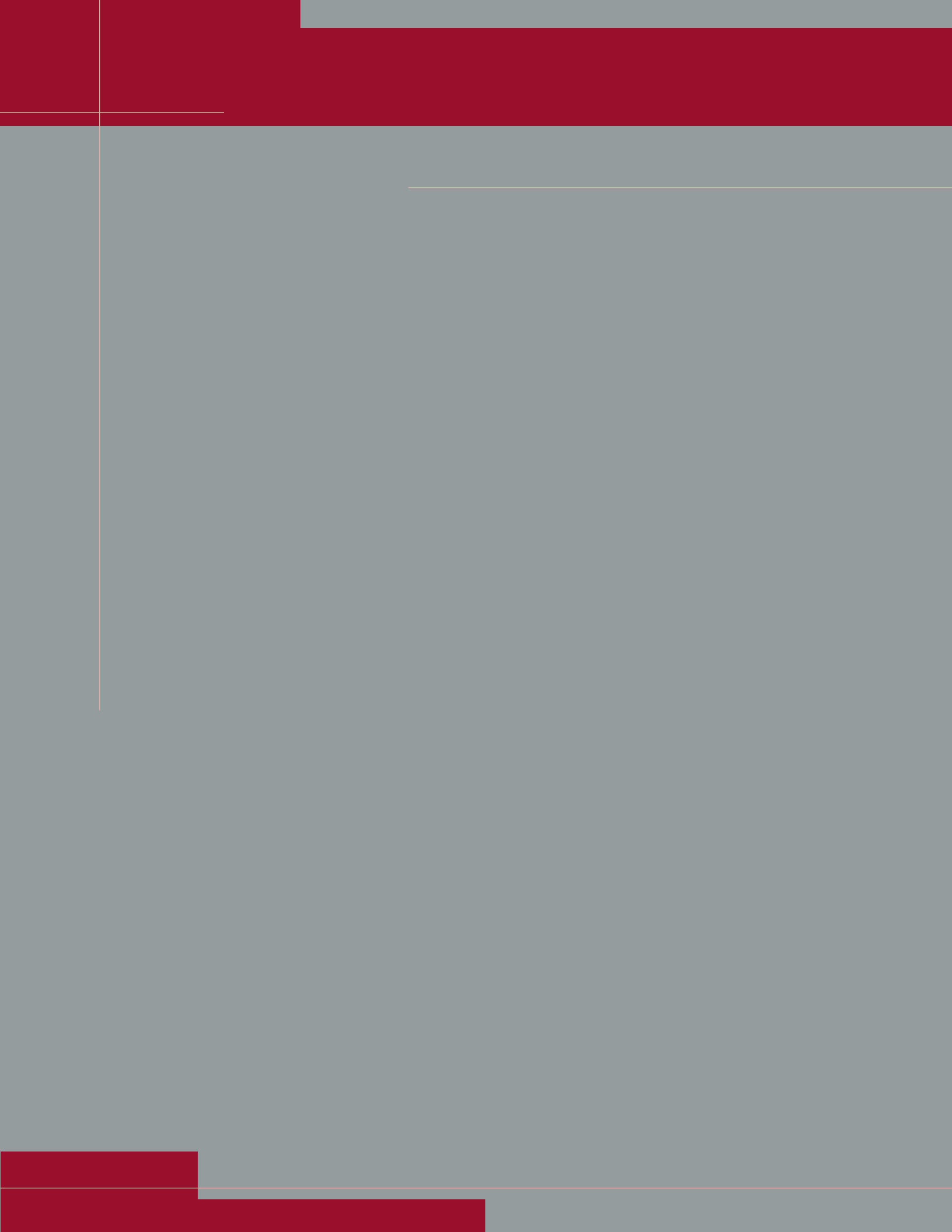
At the community level, there is a growing number of innovative cross-sectoral partnerships that are finding new ways to sustain community services and address development issues, such as poverty and homelessness. These partnerships integrate economic and social development strategies to find lasting solutions. They are often led by community development agencies from the voluntary sector. Many successful examples of this innovation can be found in Quebec, where some organizations have significantly improved the economic and social foundation of their communities by creating new employment opportunities for marginalized and unemployed workers. The “social economy,” as this movement is called, now employs thousands of people and has created a broad range of small enterprises. It is also rapidly growing in other parts of Canada through the community economic development movement.

**Public policy can play a key role in supporting and encouraging new forms of collaboration and community investment.**

The experience in the U.K. and other developed countries shows that fiscal incentives and other policy instruments can play an important role in encouraging and enabling these new forms of cross-sectoral collaboration. To date, however, there has been little public policy focus or support in Canada to encourage and realize this potential.







# RECOMMENDATIONS

## BUILDING STRONGER COMMUNITIES THROUGH PRIVATE SECTOR COMMUNITY INVESTMENT AND PRIVATE/VOLUNTARY SECTOR PARTNERSHIPS

The Private/Voluntary Sector Forum recommends that the federal government develop an integrated public policy initiative (the Community Partnership Initiative) to encourage more effective engagement between business, the voluntary sector and government in support of community services.

### The Community Partnership Initiative Should Support Four Key Objectives:

1. Stimulate and support dialogue, knowledge sharing and cross-sector collaboration.
2. Encourage and support research and knowledge development.
3. Build the capacity of the voluntary and private sectors to work in partnership.
4. Encourage greater private sector community investment through legal and regulatory reform.

Each of these four objectives should be supported through a combination of regulatory and policy reforms and provision of additional funding to support new collaborative initiatives and capacity building. Preliminary estimates of the resources needed to support the full implementation of these recommendations would be in the range of \$100 million over five years, \$50 million of which has already been allocated in the 2004 federal budget. The resources for this initiative should be delivered through a coordinated program involving a number of key government departments and agencies. These could include Social Development Canada, Human Resources and Skills Development Canada, Canadian Heritage, Industry Canada, Finance Canada, the Canada Revenue Agency and related government-funded foundations such as the Canada Foundation for Innovation.

*“The ongoing vitality of our communities is both in our long-term business interest and in the interests of a healthy, vibrant country. No enterprise operates in a vacuum.”*

**Tony Fell, Chairman, RBC Dominion Securities**

# STIMULATE AND SUPPORT DIALOGUE, KNOWLEDGE SHARING AND CROSS-SECTOR COLLABORATION

## Key Issues

### **Changing roles, relationships and responsibilities are causing confusion and frustration for all sectors.**

Changing expectations about the role and responsibilities of the private and voluntary sectors in supporting the community are creating serious stress for both private and voluntary sector organizations. The voluntary sector is struggling with a dramatic increase in demand for services and a reduction in support from government. The private sector faces highly unrealistic expectations to increase financial and other support to the community. In this environment, there is a need for a more sustained dialogue between these two sectors and government and a realistic assessment of how all three sectors can work together effectively to support community.

### **Lack of understanding and dialogue limits the potential for private sector community investment.**

Social responsibility and corporate citizenship have become important, but potentially confusing, issues for many businesses. Canadians want business to be actively and visibly involved in making a difference on social issues. At the same time, however, a more engaged role for business in community development can generate a negative reaction among voluntary and nonprofit organizations, some of which view business with suspicion and distrust.

### **Lack of understanding by the private sector of the full scope of organizations and skills in the voluntary sector can limit the voluntary sector's appeal as a potential partner.**

Many private sector organizations tend to see the voluntary sector as well meaning but not professional and capable. Many businesses do not understand the real assets these organizations can also represent for business, from opening up new markets to providing valuable professional development experience for their employees. In this context, the term "voluntary sector" does the sector a disservice. It is a poor descriptor for a sector that encompasses a broad range of organizations, from small charities to highly professional nonprofit organizations that are the equal of many businesses.

### **The role of government is key in helping to bridge these differences.**

The role of government is key from several perspectives. Government has the regulatory and public policy powers to encourage and support standards for corporate social responsibility and voluntary sector accountability. Government plays a leadership role in and has responsibility for setting the agenda for community development. Government has the power and capacity to bring together all players in the community.

## International Examples

**Denmark:** The Copenhagen Center, funded by the Danish government in 1997, aims to identify, develop and produce knowledge about corporate social responsibility, with a particular focus on new social partnerships.<sup>9</sup>

**United Kingdom:** The Minister responsible for Corporate Social Responsibility helped launch an intergovernmental network to share best practices and promote public/private partnerships across Europe.<sup>10</sup>

**Australia:** The Prime Minister's Awards for excellence in community-business partnerships were started in 1999 to recognize successful partnerships between business and community organizations that work in a spirit of social coalition to tackle problems of disadvantage and to build stronger local communities.<sup>11</sup>

**Finland:** Since 1996, Finland's Ministry of the Environment, in association with the Environmental Communities Association and the Helsinki School of Economics, has awarded an annual reporting award for social and environmental reports.<sup>12</sup>

*"The traditional definition of a charity was based on a model of alms to the poor, not community development. That makes it very difficult for organizations that want to deal with the root causes of social problems."*

Peter Broder, Interim VP Public Affairs, Canadian Centre for Philanthropy

<sup>9</sup> See [www.copenhagencenter.org](http://www.copenhagencenter.org)

<sup>10</sup> See [www.societyandbusiness.gov.uk](http://www.societyandbusiness.gov.uk)

<sup>11</sup> See [www.partnership.zip.com.au](http://www.partnership.zip.com.au)

<sup>12</sup> See [http://www.csrcampaign.org/publications/Finland\\_page364.aspx](http://www.csrcampaign.org/publications/Finland_page364.aspx)

## Recommendations

### **Create a multi-sector National Community Partnership Roundtable**

- The National Community Partnership Roundtable would be composed of regional representatives and national organizations working in the field of business-community partnerships. The role of the roundtable would be to:
  - Review and help set the direction for the Community Partnership Initiative; monitor and evaluate its impact.
  - Based on the Community Partnership Initiative's research and activities, make recommendations to government on public policy that could encourage business-community partnerships and private sector community investment.

### **Provide support for coordination and development of regional business-community partnerships.**

- Support should be provided to regional intermediaries that are working to engage and promote cross-sectoral strategies for community building. This would include providing forums for:
  - Sharing knowledge and ideas, and developing new strategies, for responding to specific community needs and addressing systemic challenges such as homelessness and poverty.
  - Understanding the capacity and capabilities of each sector to support community.
  - Identifying challenges and obstacles to building more effective partnerships between the sectors for community building.

### **Stimulate and encourage innovation in private/voluntary sector partnerships through public recognition such as awards and media awareness programs.**

- Provide support for national and regional awards and public awareness programs that recognize and encourage leadership in business-community partnerships.

### **Improve the effectiveness of federal government efforts to encourage cross-sectoral action through greater collaboration across government departments.**

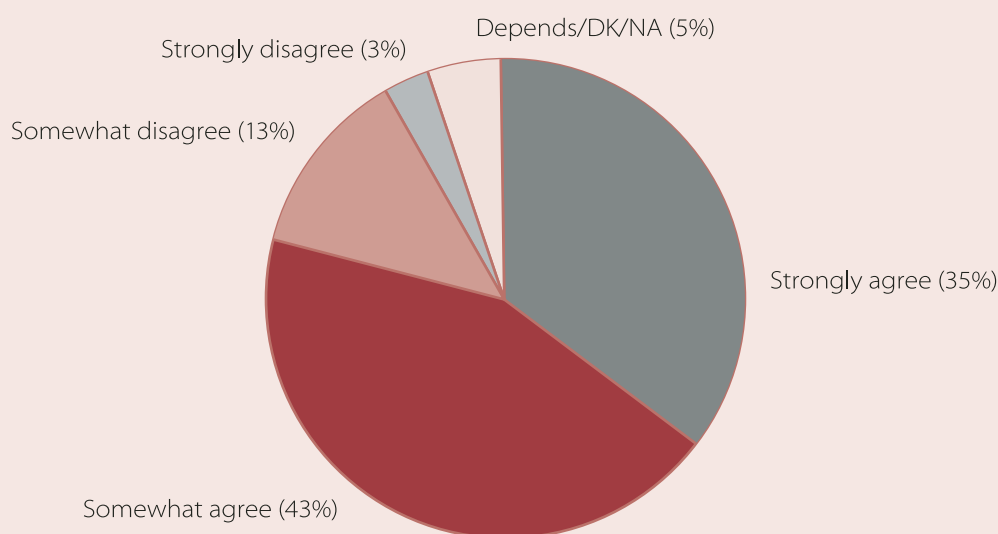
- Improve coordination among federal government departments, such as Human Resource and Skills Development, Social Development, Heritage, Industry and Health Canada, to ensure that efforts to build community capacity are coordinated and collaborative in nature.
- Leverage learning from the Voluntary Sector Initiative's Reference Group of Ministers and the Joint Tables as a guide for similar exchanges among the three sectors. One of the important achievements of the Voluntary Sector Initiative was providing a coordinating focal point for voluntary sector exchanges with the federal government.
- Consider developing single contact points within communities that provide a range of government services and resources for organizations working in community development. The Community Futures Initiative, currently administered through regional development agencies, is a good example of this.

*“And the government will help communities to help themselves. One of the best ways to do this is to get behind the remarkable people who are applying entrepreneurial skills, not for profit, but rather to enhance the social and environmental conditions in our communities right across Canada.”*

Speech from the Throne, February 2004

## To Be Socially Responsible A Large Company Has To Go Well Beyond What Laws Require

2002



GLOBESCAN

Corporate  
Social  
Responsibility  
MONITOR

## ENCOURAGE AND SUPPORT RESEARCH AND KNOWLEDGE DEVELOPMENT

### Key Issues

#### **Lack of accurate information makes it difficult for each partner to assess the capacity of the other.**

A lack of accurate information on the scope, scale and capacity of the voluntary sector makes it difficult for companies to understand the opportunities and challenges in building community partnerships. While research done through the Voluntary Sector Initiative, such as the National Survey of Nonprofit and Voluntary Organizations, is beginning to address these issues, more needs to be done, particularly in understanding the potential and capacity of the voluntary sector to work with business.

There is also a lack of information on the scope, scale or impact of the private sector's community investment activities and programs. The only indicator currently tracked and reported is corporate charitable contributions; however, less than 5% of Canadian businesses currently report these figures, making this an inaccurate

indicator of what business is actually giving. Under the current reporting regime, charitable donations are treated as a business expense, and most companies simply report them as such. Moreover, there is currently no tracking of the many other forms of support (e.g. community sponsorship, employee volunteers) that companies provide.

The absence of clear reporting standards can make it difficult for a company to benchmark its performance and develop appropriate management systems for its community investment programs. It also results in highly unrealistic demands and expectations. The widely accepted belief of charities and individuals is that private sector donations account for 20% of charitable revenues. In reality, this figure is closer to 1% to 2%. In this environment, charities often approach business with unrealistic financial expectations. At the same time, they do not take the time to consider other forms of support business can provide, such as in-kind donations of goods and services, and employee volunteers.

Finally, there has been no systematic research or reporting on the growing phenomena of private/voluntary sector partnerships: what is their impact, what is their potential and what are the factors critical to their success? Initiatives such as Imagine's "New Spirit of Community" Partnership awards demonstrate that a wide range of innovation is taking place. However, no serious analysis has been undertaken of this innovation and what is required from both sides to make partnerships work.

**Lack of clear reporting and accountability standards make it difficult to manage partnerships.**

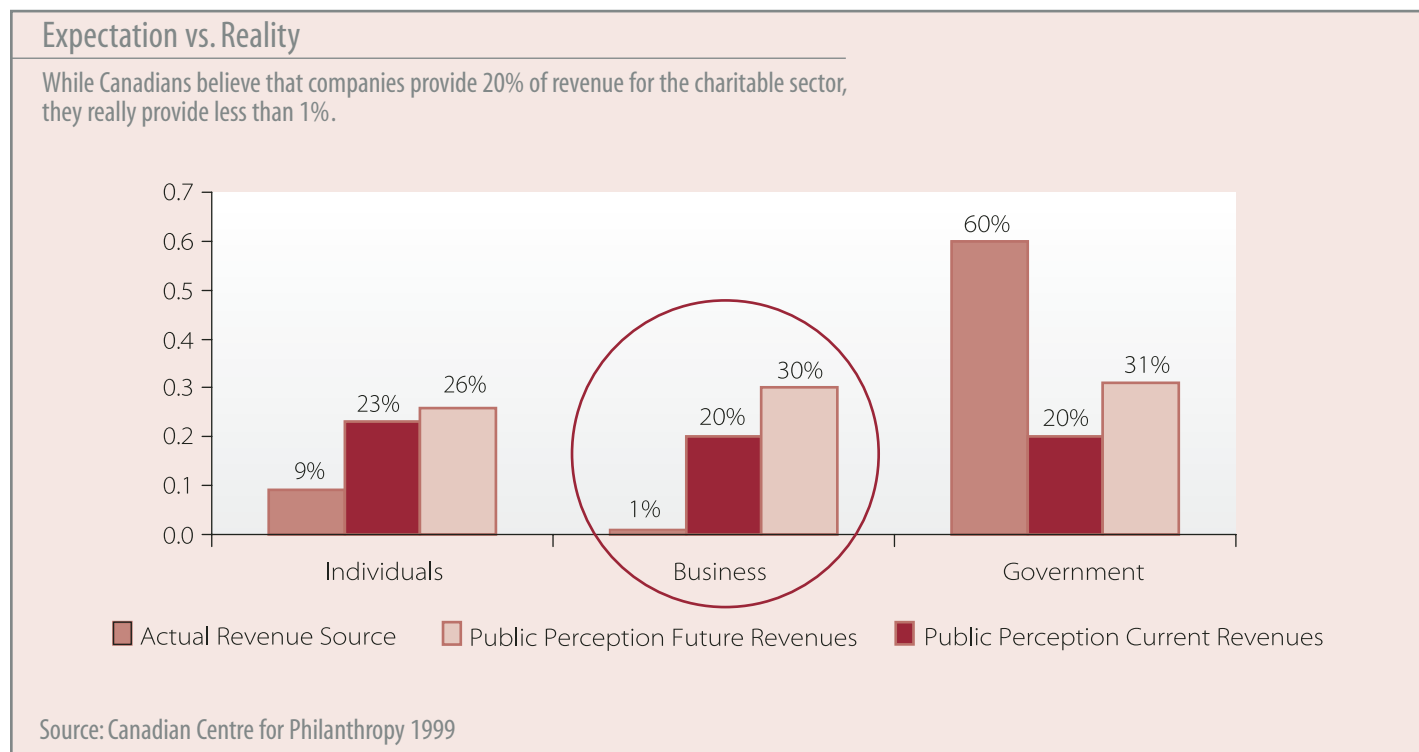
As voluntary and private sector organizations begin to work together more closely, concerns about accountability and reporting standards are becoming important issues. Currently, there are no well-recognized or accepted accountability and reporting standards beyond those that apply to charitable giving, and both sectors report widespread misunderstanding of these guidelines.

As public pressure for corporate community involvement increases, business is trying to overcome the restrictions and limitations on charitable recognition by developing new forms of community sponsorships. These sponsorships include opportunity for recognition and specify clear outcome requirements. By some estimates,

these forms of support now exceed or equal charitable giving. For voluntary sector organizations, the emergence of new forms of community support beyond philanthropy is creating challenges. This is particularly evident when it comes to sponsorships where there are no clearly agreed-upon principles and guidelines for sponsor recognition.

**International Examples**

**France and the European Union:** In 2002, the government of France passed a law requiring all publicly listed companies to report on their social and environmental impact. These New Economic Regulations (nouveaux règlements économiques, or NRE) have been noted as "one of the most important breakthroughs in sustainability reporting to date, in Europe or elsewhere." Although they focus primarily on financial reporting, they also legislate disclosure of social and environmental impacts.<sup>13</sup> Other European initiatives, such as the European Foundation Centre, Corporate Citizenship Europe and CSR Europe, are all examples of how the EU is trying to increase knowledge and transparency on corporate community impact.



<sup>13</sup> Brown, M., McKeown, L. (2003). "Building Stronger Communities: Business and Voluntary Sector Organizations Working Together", 32. Toronto, Imagine, Canadian Centre for Philanthropy.

## Recommendations

### **Improve knowledge and understanding of the role, capacity and potential of the voluntary sector to support communities.**

- Support for research begun through the Voluntary Sector Initiative (e.g. the National Survey of Nonprofit and Voluntary Organizations) should be expanded to allow better understanding of what is needed to build the capacity of the sector so that it will be better equipped to work with the private sector in community development.
- The voluntary sector should be encouraged and supported to provide more accurate reporting on the forms of corporate support it receives so that the impact of the private sector on community building can be assessed.

### **Improve knowledge and understanding of the role, capacity and potential of the private sector to support communities.**

- Support should be provided for research to investigate and track the changing relationship of business to social and community development. The goal of this research would be to improve the benefits of community development for business, the voluntary sector, and the community.
- Support should be provided for further research into the scope and scale of corporate community investment and measures that could encourage better reporting by companies. In this regard, the Public Accountability Statement now required for large financial institutions under Section 459.3(1) of the Bank Act may be a good model. This statement looks at community impacts of organizational activities. This should be reviewed to understand its impact and effectiveness in encouraging better reporting.

### **Improve knowledge and understanding of the impact, value and potential of new collaborative approaches to community development and support.**

- Resources should be provided for research into the growing phenomena of private/voluntary sector partnerships to better understand the limitations and challenges of these partnerships, as well as their potential ability to find innovative ways of meeting social challenges and delivering social services.

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## BUILD THE CAPACITY OF THE VOLUNTARY AND PRIVATE SECTORS TO WORK IN PARTNERSHIP

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### Key Issues

#### **The voluntary sector lacks organizational capacity to build effective partnerships with business.**

Current restrictions on funding for the voluntary sector have made it difficult for most voluntary sector organizations to develop the organizational capacity to manage joint ventures or collaborative initiatives with the private sector. For example, few voluntary organizations have ready access to legal advice or experience that can guide them in entering into contractual arrangements with private sector organizations.

#### **Government restrictions on funding and reporting requirements are an obstacle to developing organizational capacity.**

The current focus on project-based financing by government is a serious issue for the voluntary sector. With over 50% of funding for the sector coming from government, the public sector must realize the importance of providing stable funding for the operational costs of the organizations it funds. Without this support, these organizations constantly struggle to survive and have little time or resources to build their organizational capacity and develop productive partnerships with the private sector. Given that the private sector accounts for only 1–2% of voluntary sector revenues, it cannot be expected to replace government in supporting the core operations of voluntary sector organizations.

Increased expectations and demands for detailed accounting and reporting for federal support are also a heavy burden for both the voluntary sector and government itself. The costs associated with reporting and undertaking third party audits, and securing project grants, can substantially reduce the effectiveness and impact of the programs supported.

**The community economic development and social enterprise organizations in the voluntary sector demonstrate a strong potential for building the organizational capacity and impact of the voluntary sector, but aren't well supported by current public policy.**

Community economic development and social enterprise organizations make up a fast-growing component of the voluntary sector. These organizations demonstrate the potential of the voluntary sector to be a leading force in community renewal. By bringing together all sectors of the community, including business, these organizations help marginalized communities build sustainable social enterprises and help create meaningful social and economic integration opportunities. However, the potential of these organizations is limited by current restrictions in public policy. For example, they often cannot access charitable dollars for the community development component of their work and the enterprises they create are often not eligible for private sector financial supports, such as startup equity and debt financing.

**The Voluntary Sector Initiative is an important first step in identifying what needs to be done to build the organizational capacity of the voluntary sector, but more remains to be done.**

Through the Voluntary Sector Initiative, the government took an important step in beginning to engage and work with the voluntary sector as a partner in community building. However, it is important to build on the foundations that have been laid. The final outcomes and deliverables of this process are still unclear to many voluntary sector and private sector organizations. Resources need to be provided to enable the sector to build its capacity to work with others, particularly the private sector.

## International Examples

**United Kingdom:** The Phoenix Fund<sup>14</sup> was set up by the British government to create a broad base of funding to support Community Economic Finance Institutions and encourage entrepreneurship in disadvantaged areas. Support is focused on:

- Filling gaps, particularly among groups and in areas with low enterprise propensity, and adding value to other social inclusion and related priorities such as the specific needs of social enterprise, ex-offenders, refugees, and rural communities.
- Building the capacity of business intermediaries.
- Piloting local business support.

Main facets of the current program include:

- A Development Fund to promote innovative ways of supporting enterprise in deprived areas (England only).
- A pilot network of volunteer mentors for pre- and early start-up businesses, through the Business Volunteer Mentoring Association.
- Capital, revenue and loan guarantee support for Community Development Finance Institutions. A community development venture fund has also been set up to create a venture capital fund for nonprofit social enterprises in disadvantaged communities.

**Denmark:** The Company Pond Initiative in Denmark encourages partnerships by providing government seed funding to businesses to start up community social responsibility projects. Voluntary initiatives include the Denmark Centre for Corporate Citizenship<sup>15</sup>, which “focuses on new partnerships between business and society, corporate citizenship, social capital, social networks and institutional policy in modern society.” The partnerships focus on issues such as job retention, employment of people with reduced working capacity, improvement of work/family relations, and raising awareness on local, regional and national levels.

*“Addressing community issues is moving from a dynamic of charity to a dynamic of partnership.”*

Nancy Neamtan, President of Chantier de l'économie sociale

<sup>14</sup> See <http://www.sbs.gov.uk/default.php?page=/phoenix/default.php>

<sup>15</sup> See [http://www.corporate-citizenship.co.uk/employees/studies/e1/seven\\_denmark.asp](http://www.corporate-citizenship.co.uk/employees/studies/e1/seven_denmark.asp)

## Recommendations

### **Provide support for an on-line information and resource centre to collect and disseminate information on business-community partnerships.**

- Support should be provided for an on-line resource centre that can act as the dissemination point for research conducted by the National Community Partnership Roundtable and provide access to e-learning and other training resources.

### **Provide support for the development and delivery of training resources to help both sectors build their capacity to develop effective community partnerships.**

- Under the guidance of the Community Partnership Initiative, provide support to intermediaries for the development of training resources that can help both the private and voluntary sectors work together. These resources should be delivered through the on-line resource centre and e-learning platform, as well as locally through regional intermediaries and educational organizations. Topics to be covered should include basic orientation and skills development, and the potential and role of new forms of collaboration, such as social enterprise, as a strategy for community renewal.

### **Provide support to the federal government's voluntary and community sector partners to enhance their capacity to work with the private sector at the community level.**

- Provide sufficient resources to allow the government's voluntary and community sector partners to build their organizational capacity for managing collaborative partnerships. Project funding provided by government should include a percentage (e.g. 15%) that is directed toward infrastructure and capacity-building costs. The government should work with the National Community Partnership Roundtable to determine the most appropriate percentage.
- Through the National Community Partnership Roundtable and as a follow up to the Voluntary Sector Initiative "Accord," the government should work with its private and voluntary sector partners to develop a new framework for accountability that would simplify and streamline reporting systems, and create a better balance between accountability for outcomes and administrative accountability for funds.

### **Provide grants and contributions to support the voluntary sector in developing innovative cross-sectoral initiatives for community development and renewal.**

- Provide matching contributions to support cross-sectoral collaboration strategies for community renewal that have strong community support and viable business plans.

### **Improve access to capital and financial support for nonprofit social enterprises and the social economy.**

- Review the current eligibility criteria for private sector financing and investment incentives, along with other support programs, with a view to allowing nonprofit social enterprises access to these resources.
- Review current federal government procurement and contracting policies to determine the appropriateness of including social enterprise in competitions for government contracts.

### **Create a seed capital fund to support development of nonprofit social enterprises that can contribute to a strong social economy and play a key role in building Canadian communities.**

- Establish a seed capital fund for social enterprise initiatives that have demonstrated their potential to strengthen social infrastructure through entrepreneurial ventures. These initiatives will have a well-articulated business plan and strong multi-sectoral support.

# ENCOURAGE GREATER PRIVATE SECTOR COMMUNITY INVESTMENT THROUGH LEGAL AND REGULATORY REFORM

## Key Issues

**A clear policy framework for corporate social responsibility does not exist; in particular, there are no policies in place that encourage greater private sector engagement in and support for community.**

There appears to be no clear integrated policy framework underpinning government's expectations or support for corporate social responsibility and corporate community investment. Most initiatives, such as the Public Accountability Statement now required for large financial institutions under Section 459.3(1) of the Bank Act, are strictly regulatory in nature. There is no government agenda to engage business as a partner in community and social development.

The private sector's contribution of non-financial resources to community development is increasing overall, and can greatly augment the value of corporate financial contributions. These resources are valuable and need to be recognized in order to encourage continued contributions.

**The current definition of charitable gifts is inadequate as an instrument to encourage greater corporate support for the community.**

The current legal definition of a charitable gift does not allow for any meaningful or contractual reciprocity in the relationship between donor and charity. This prohibits the development of true partnerships, which must be able to provide clear benefits to all parties. These restrictions, in particular the restrictions on donor recognition, are the reason why many companies fail to increase their investment in the community.

As a way of getting around these limitations, many companies are now turning to a sponsorship model of support for the voluntary sector. While this form of support is undocumented and unreported, current estimates suggest that it carries a value that equals or even exceeds traditional charitable giving. But sponsorship can create real problems for voluntary sector organizations, particularly those that lack the knowledge and capacity to negotiate and manage them. They can also result in a disproportionate influence by the donor on voluntary sector organizations and their activities.

## International Examples

**United Kingdom:** The U.K. has an independent charities commission to oversee charities and has recently proposed expanding the definition of charity to include:<sup>16</sup>

- social and community advancement;
- the advancement of culture, arts, and heritage;
- the advancement of amateur sport;
- the promotion of human rights, conflict resolution, and reconciliation;
- the advancement of environmental protection and improvement; and,
- other purposes beneficial to the community.

By extending the definition of the types of organizations that qualify as charities, the U.K. government will increase the ability of many of these organizations to be included in initiatives designed to encourage greater corporate community investment.

*“Community enterprises in Canada are currently struggling to finance their activities. Equity financing is often difficult if not impossible to obtain due to the hybrid nature of these ventures, which provide both financial and social returns. Typical private sector financing focuses primarily on financial returns, while non-profit financing focuses on social returns. This leaves a gap in financing for many community-based enterprises....”*

CCEDNet, CED Funding and Delivery Proposal, Nov. 2003

<sup>16</sup> Brown, M., McKeown, L. (2003). “Building Stronger Communities: Business and Voluntary Sector Organizations Working Together”, 32. Toronto, Imagine, Canadian Centre for Philanthropy.

In October 2001, the U.K. government introduced the Community Investment Tax Credit to improve access to capital for small businesses, potential business start-ups, and community projects in disadvantaged regions of the U.K. The credit provides tax relief to corporations and individuals that invest in community development finance institutions, which, in turn, invest in charitable projects and small businesses in disadvantaged communities.

**United States:** The Community Reinvestment Act<sup>17</sup> (targeted at depository institutions) and the Community Development Venture Capital Framework promote the creation of a more buoyant social capital market for community investment through targeted tax incentives and mandated corporate investment.

The New Markets Tax Credit (NMTC) Program permits taxpayers to receive a credit against federal income taxes for making qualified equity investments in designated community development entities (CDEs). Most of the qualified equity investment must in turn be used by the CDE to provide investments in low-income communities. The credit provided to the investor totals 39% of the cost of the investment and is claimed over a seven-year credit allowance period. In each of the first three years, the investor receives a credit equal to five percent of the total amount paid for the stock or capital interest at the time of purchase. For the final four years, the value of the credit is six percent annually. Investors may not redeem their investments in CDEs before the end of the seven-year period.

## Canadian Examples

Some Canadian provinces have instituted programs to support cooperatives and social enterprises.

### **Nova Scotia:**

- **Nova Scotia Equity Tax Credit:** Investors receive a non-refundable provincial tax credit of 30% of the amount invested in community development funds to a maximum credit of \$9,000 that can be carried back three years and forward seven years.
- **Community Economic Development Investment Fund Tax Credit (CEDIF):** This program expands on the equity tax credit by offering a partial guarantee on the last 20% of an investment in areas outside of Halifax, Dartmouth, Bedford and Sackville for the first four years. Shares in community investment funds are

also pre-approved as holdings in self-directed RRSP accounts. On the condition that investments are held for four years, investors receive the following benefits:

- provincial tax credit of 30% of the amount invested;
- an increase in the foreign property content of the investor's RRSPs equal to the amount of the investment in the CEDIF;
- an RRSP tax reduction for their marginal tax bracket; and,
- the last 20% of the investment guaranteed by the provincial government.

After two full years of this program the government of Nova Scotia has seen a cumulative cost benefit of \$180,000. This includes employment benefits, household income, and provincial government revenue.

### **Manitoba:**

- **Manitoba Grow Bonds<sup>18</sup>:** Manitoba Grow Bonds allow communities to plan and manage bond capital funds to support new business opportunities and expansions. Activities are managed by Rural Development Bond Corporations. Only Manitoba residents and corporations are eligible to purchase Grow Bonds and bondholders have voting rights in the Bond Corporations. Grow Bonds are available in denominations of \$100, limited to individual purchases of \$50,000 or 10% of an issue, whichever is less, for a five-year term. The Government of Manitoba guarantees the bond principle.
- **Manitoba Community Enterprise Development Tax Credit<sup>19</sup>:** The Manitoba CED Tax Credit is a non-refundable, 30% personal income tax credit for resident investors in eligible community enterprise development projects. The maximum credit that an individual investor can earn in a year is \$9,000, based on a maximum \$30,000 eligible investment. Any credits and claim earned but unused in a given year are available to be carried forward for up to seven years and carried back up to three years for tax years. Investors are expected to maintain their investments in qualified community enterprises for a prescribed period of time in order to fully benefit from the tax credit.

<sup>17</sup> <http://www.ffiec.gov/cra/default.htm>

<sup>18</sup> See <http://www.gov.mb.ca/ia/downloads/growbonds.pdf>

<sup>19</sup> See <http://www.gov.mb.ca/finance/fedprov/cedc.html>

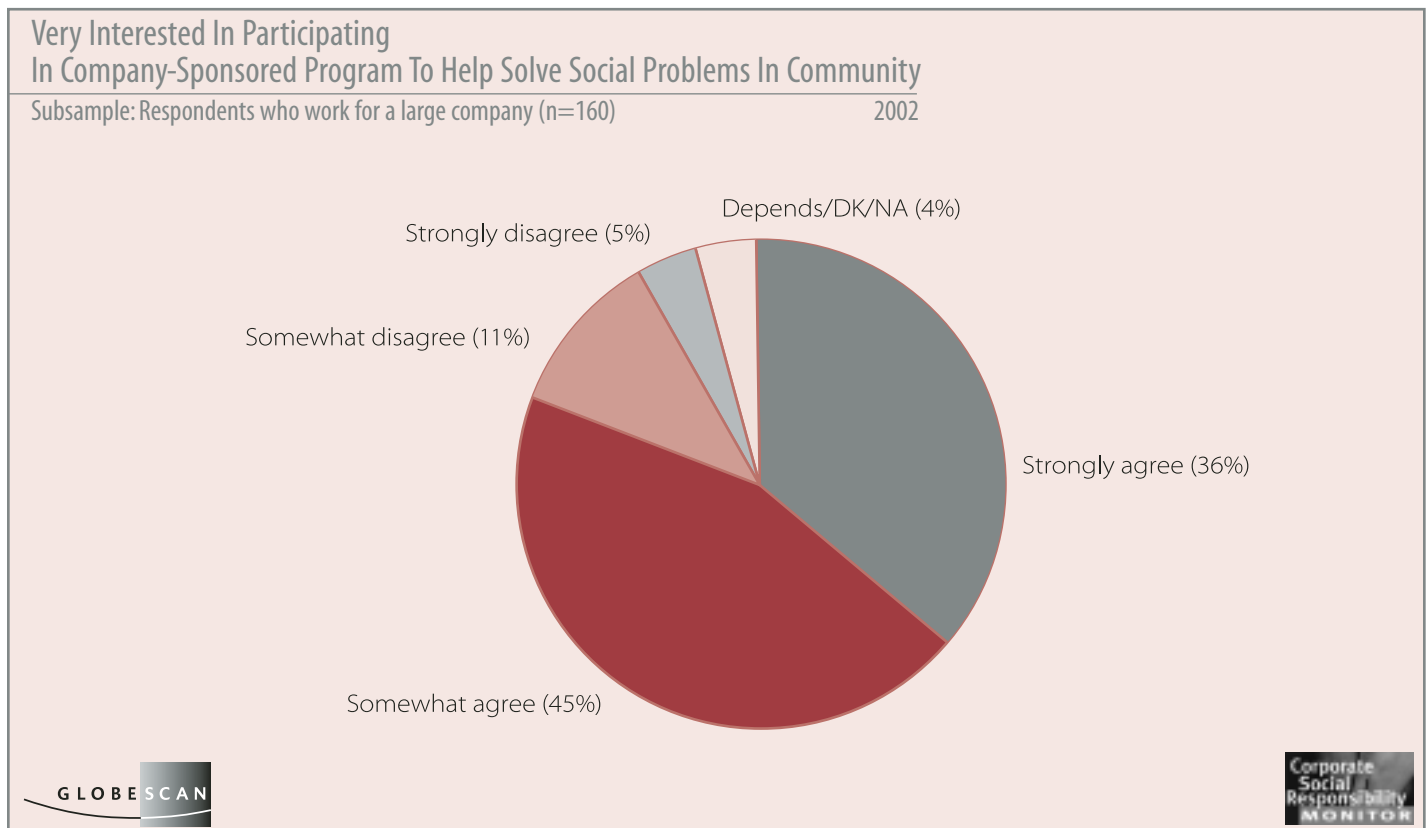
## Recommendations

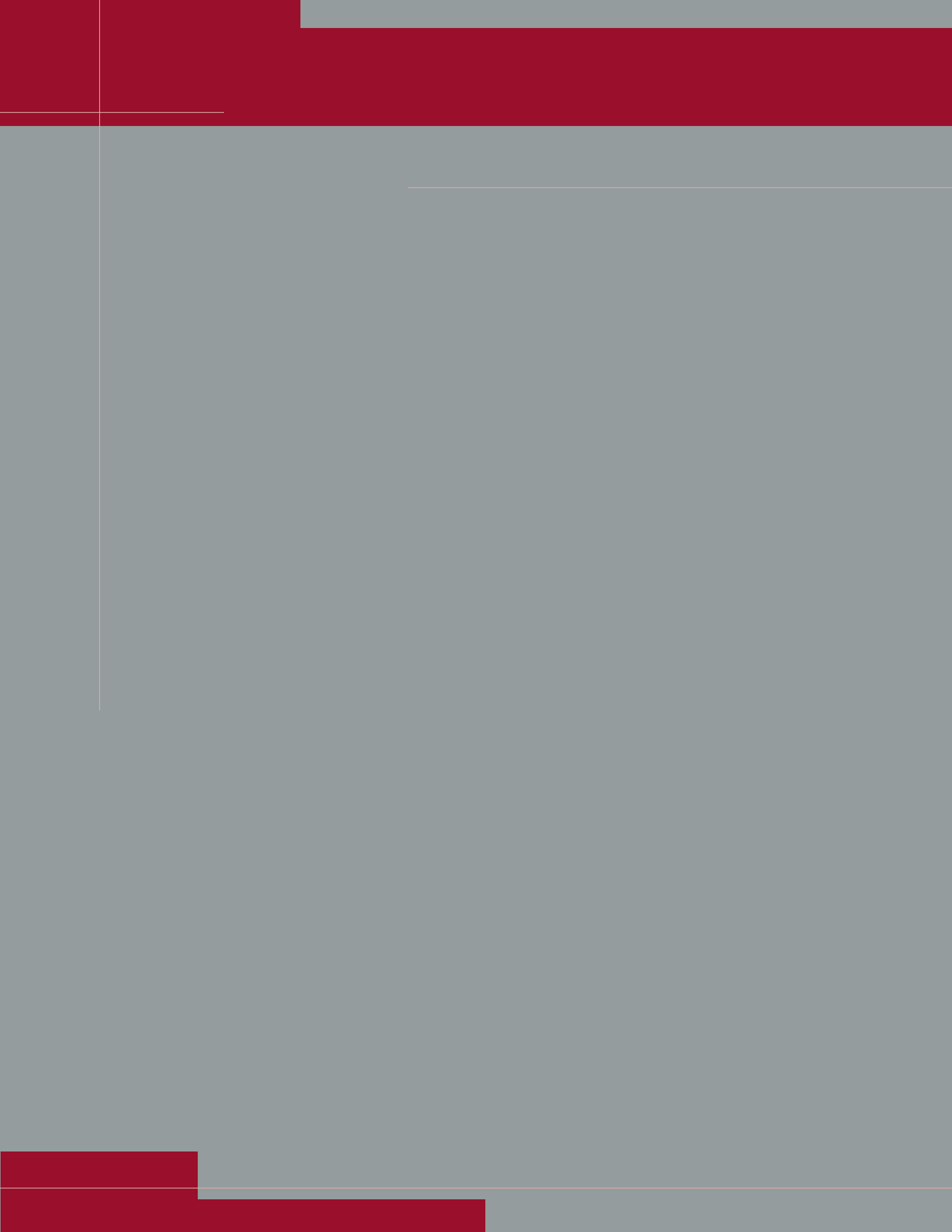
### Provide better recognition for corporate charitable gifts.

- In the short term, the federal government should modernize the interpretation of the existing income tax regulations regarding charitable giving:
  - Donor recognition should be expanded to allow for better recognition of corporate charitable gifts.
  - The recent Canada Customs and Revenue Agency Interpretation Bulletin regarding split receipting should be reviewed to determine whether this initiative effectively addresses donor recognition concerns.
- In the medium to long-term, the entire regulatory environment of the voluntary sector needs to be examined and the current list of qualified charitable objects expanded to better reflect multiple forms of corporate support, similar to legislation proposed in the U.K.

### Explore other regulatory instruments to encourage greater corporate community investment.

- Explore other mechanisms to encourage more corporate support for the community and better reporting including:
  - Better provisions to allow corporate donations of property, such as shares.
  - Mechanisms, such as community investment tax credits, to encourage greater corporate community investment, particularly in distressed communities.





# INNOVATIVE PARTNERSHIPS

## PROFILES OF CROSS-SECTOR PARTNERSHIPS FROM ACROSS CANADA

The following 11 partnerships are examples of innovation in action. They provide an overview of some innovative and collaborative cross-sectoral partnerships and their impact on society. In each case, the goal is to address an issue of concern to a Canadian community. The organizations involved in these partnerships are drawn from different sectors and different areas. They are large and small, established and new. They all demonstrate the potential to strengthen and build community through partnership and action.

### **GlaxoSmithKline and the Canadian Hospice Palliative Care Association Combine Resources to Promote Better End-Of-Life Care**

#### **LIVING LESSONS**

The Canadian Palliative Care Association and GlaxoSmithKline (formerly Glaxo Wellcome Inc.) created an ambitious and groundbreaking social marketing campaign called Living Lessons, aimed at increasing awareness of hospice palliative care's ability to enhance the comfort and dignity of individuals approaching the end of their lives.

Through various vehicles, including communication tools developed for national, provincial and community-based palliative care organizations, the program encourages open dialogue on death and dying. It seeks to educate patients, caregivers, medical professionals, volunteers and policy makers about the resources and expertise that are – or should be – available in their communities. It envisions the day when hospice palliative care becomes a core element of the health care system. And its participants see the program as a catalyst for fundamental change in the way Canada's death-denying culture confronts end-of-life issues.

"Glaxo's involvement in this program is like manna from heaven," says Linda Lysne, executive director of the Canadian Palliative Care

Association. "It's a huge opportunity. We're a small and relatively new organization with few financial and human resources. There's no way we could do anything of this magnitude without Glaxo's incredible leadership and commitment."

The roots of the partnership were formed in 1997 when Glaxo employees were asked to ponder a cause they could support on an ongoing basis. They chose hospice care. Since then, Glaxo has provided both financial support and the project management resources spawning the design and development of the program.

It has invested some \$400,000 through in-kind services and investment in the Living Lessons national public awareness campaign. It has forged strong bonds with many of the national, provincial and community-based palliative care organizations in Canada. And it funded research as well as an Open Space conference to ensure that relevant issues were explored and discussed.

"From the start this was an employee-driven project," says Tara Addis, Glaxo's manager of external relations. "They chose the project and that has instilled great employee pride and loyalty. And in working so closely with the palliative care movement, we know we have been able to affect much greater change than had we just provided funding."

### **Working and Learning Together to Build Community Opportunities: RBC Financial Group and Lutherwood Community Opportunities Development Association**

#### **OPPORTUNITIES 2000**

As someone seeking support for an ambitious anti-poverty campaign in the Waterloo region, Paul Born raised eyebrows when he informed Royal Bank of Canada executives that their money wasn't enough.

In fact, the consulting director of Lutherwood Community Opportunities Development Association (LCODA) insisted during that 1997 meeting that cash offers would be flatly rejected unless accompanied by a solid commitment of time, energy and expertise.

The bank accepted the challenge. And in a unique program dubbed Opportunities 2000, it has more than lived up to Born's lofty expectations.

Opportunities 2000 is an innovative, community-based program determined to help 2,000 Waterloo Region families escape poverty by 2000. It plans on achieving this by working with community groups (32 to date) to develop projects (18 so far) that increase employment opportunities for people living in poverty, by recruiting high profile community leaders to increase awareness of the issue and generate a comprehensive poverty-reducing plan, and by researching the most effective community initiatives across Canada.

Through it all, the bank's ongoing involvement has been both substantial and crucial.

"RBC is taking a real leadership role," Born says emphatically. "It is very much engaged in the process of reducing poverty in the region. We couldn't have accomplished what we have with money alone. We needed the absolute commitment the bank has provided."

The bank's \$240,000 financial commitment to the four-year project makes it the leading financial supporter. But Jim Gordon, Vice-president of Business Banking in the Golden Horseshoe, has also become a tireless member of a leadership roundtable seeking market-based solutions to a problem affecting some 50,000 people in an area that claims among the lowest unemployment and highest income per capita rates in Canada.

Gordon was among eight bank employees whose eyes were initially opened to that stark reality during a poverty tour at the outset of the project. Shortly thereafter, he hired a local private banking manager for a four-month stint to help facilitate groundbreaking dialogue between LCODA and the area's business community. And today the bank continues to raise awareness of the problem at every opportunity.

"The more we can get business involved, the more you can see it becoming part of the solution," Gordon emphasizes. "We see this as an opportunity – and an obligation. This is a way to fight poverty in a whole new way."

## **Families in Transition: Enbridge Inc., Aspen Family and Community Network Society (and Associated Community Organizations), United Way of Calgary and Area (Strategic Giving Group), Government of Canada-Supporting Community Partnerships Initiative**

### **FAMILIES IN TRANSITION**

Families in Transition (FIT) is a program focused on finding a long-term solution to homelessness in the Calgary area by providing a subsidized and supported living environment for thirty homeless families. The goal is to reduce the cycle of poverty by addressing the issue of homelessness. This program aims to increase the families' knowledge and skills in the areas of financial and household management so that meeting basic needs like rent and bill payment become regular. It also aims to keep children in school by providing a strong support network through increased connection to community service organizations.

The program is built on the energy and resources of a range of different partners: Enbridge Inc., Aspen Family and Community Network Society, Action by Churches Together with Social Services, Huntington Hills Community Association and the Strategic Giving Group, a division of United Way Calgary and Area, and Supporting Community Partnerships Initiative (Federal Government Homelessness funding).

Enbridge provides in-kind donations of furniture and fundraising and encourages its employees to volunteer and get engaged in the program. Employees organize skills training activities for the families and give their time to monthly socializing events. They also get involved with fundraising activities that are coordinated with the Aspen Family Community Network Society and other charitable partners.

A core success factor for this project is its steering committee. Drawn from organizations that provide support in the Calgary area, this group offer advice on policy direction and program development. Steering committee members are drawn from: Inn From the Cold, C.N. Gunn School, United Way of Calgary and Area, Calgary Regional Health Authority, City of Calgary Neighbourhood Services, Healthy Communities – CRHA, Alberta Human Resources and Employment, Department of Justice, Calgary Housing Company, Huntington Hills Community Association, Calgary Rocky View Child and Family Services and Calgary Police Services.

Families in Transition engages a range of resources from across the sectors to take a serious look at the issue of poverty in Calgary. With an emphasis on long-term change and unified vision, the program is creating real change for Calgary's homeless families.

## Bell Canada and Kids Help Phone

The partnership between Kids Help Phone and Bell Canada began in 1989. It was a good fit. How the partnership has grown since, however, has required considerable creative thinking on both their parts. Their latest major initiative, the creation of a 130-page web site for aiding youth, has extended an already highly productive relationship and shows the partnership's ability to change with the times and adjust to new needs.

"We had been a founding sponsor of Kids Help Phone for seven years when they came to us saying they wanted to reach teenage boys who access the Internet," recounts Lana Castle, Director, Public Affairs, for Bell Canada in Toronto.

That focus was shaped both by the notable success of the original project and the areas in which Kids Help Phone was still not able to reach part of the population it was meant to help. Tracking information showed that 78 per cent of the callers were female, reflecting the continued challenge around getting boys to talk about their concerns. The Internet seemed to be a medium that boys were more comfortable with. It could also be hot-linked to community resources whose electronic invitations to aid might spur more direct contact.

By the time the web site was being prepared for launch, Kids Help Phone was receiving 4,000 calls a day from young people who needed counselling and support. Even with an annual budget exceeding \$5 million, the toll-free, national and bilingual phone service could only handle a third of the calls.

The partnership has always made business sense to Bell: the centrality of telecommunications in providing the service; a focus on youth, Bell's major area of community commitment; and what Ms. Castle terms Kids Help Phone's "very astute understanding of a good business partnership."

Formal mechanisms of accountability such as an annual review are in place, but "nowadays, no one waits for the annual review," says Rhoda Payne, Managing Director of the Kids Help Foundation, the fundraising arm for the social service. "We have weekly status meetings, virtually. At the time of the launch (of the web site) it was almost every day.

"Just as the corporate sector is leaner and leaner," continues Ms. Payne, "charities are terribly lean too, and for the relationship to work, you really need that honesty."

As it had first done when it entered the partnership in 1989, Bell is providing technological resources and management personnel for the online program, along with the financial contribution. A key assurance for the corporate partner here is the understanding of

Bell's objectives brought to the table by Heather Sproule, National Executive Director of Kids Help Phone.

"When we conceived Kids Help Phone we saw a natural and obvious fit with a telecommunications company, Bell being the most obvious," Ms. Sproule remarks. "We felt there was an opportunity for us to demonstrate the powerful impact a partnership with a telecommunications company could have."

For a sponsorship arrangement that entailed the giving of dollars, in-kind equipment, donations and technical support, "we in return offered Bell creative and significant opportunities for recognition," says Ms. Sproule.

That appropriately business-like summation probably constitutes understatement. With the potent emotional impact of the service, widely advertised in all media and connecting to deep societal concerns about what youngsters face today on such fronts as substance addiction, sexually transmitted diseases, family disintegration and domestic abuse, Kids Help Phone visibly links its corporate partner to recognition of a particularly resonant kind.

That resonance, not surprisingly, is experienced within Bell itself.

"Part of our criteria for entering a partnership is employee pride," notes Ms. Castle at Bell. "This has scored very, very high."

## Zenger-Miller Canada and Halton Women's Place

### HALTON WOMEN'S PLACE

Training others in successful business and interpersonal practices is what Zenger-Miller does. They do it for Fortune 500 companies around the world. In 1995, they realized their expertise could also benefit a local shelter for abused women and children.

The relationship started with the commitment of a single Zenger-Miller employee who volunteered at the shelter. She began to understand the shelter's needs and felt that her company could help. She took her idea back to Zenger-Miller and suggested they get involved.

"[Our support for the shelter] was decided as a team in a team meeting," says Zenger-Miller Canada Account Services representative Carla Jones. "It was a unanimous decision. We were an office full of women and this was something we all had something of a passion for."

Zenger-Miller's passion came at an excellent time for the Halton Women's Place, explains Gail Stinnes, President, Board of Directors, of the shelter. "This started out as a volunteer organization 16 years ago," recalls Ms. Stinnes. "We have a budget of almost \$2-million now. We had started hiring social workers but no one was trained in business procedures."

Staff levels had grown rapidly. Accountability to the provincial government and to public stakeholders had become considerably more involved. Understandably, interpersonal conflict started to emerge among well-intended volunteer and staff participants who were pressured by the new levels of unfamiliar administrative demands.

That situation was becoming a significant liability for the group, which had opened a second shelter in Burlington, Ont., a couple of years before the partnership with Zenger-Miller was forged.

It didn't take long for Ms. Stinnes to see in Zenger-Miller's outreach an opportunity for aid well beyond what even a generous cash donation would have represented.

"I went to Zenger-Miller to look into (the offer of a helping partnership) and talked to some of the people there," says Ms. Stinnes of the 1995 negotiation. "They specialized in training people to work in teams, to work in different business situations and I thought, 'This is absolutely wonderful.'"

Through the partnership, Halton Women's Place receives regular and extensive use of Zenger-Miller training services and support materials. Since Zenger-Miller's training approach partly focuses on certifying workshop attendees to teach others within their own organizations, the courses rapidly had a multiplying effect for the Halton shelter.

"Once we've implemented the training, it's usually very self-sufficient," says Ms. Jones, whose company has now hosted Halton participants from the Executive Director to front-line staff.

The partnership hasn't been strictly limited to the training component. Zenger-Miller has held food and clothing drives on behalf of the shelter and donated a considerable amount of office furniture and supplies when they moved offices.

## The Saint John's Business Community Anti-Poverty Initiative

### THE ANTI-POVERTY INITIATIVE

Established in 1997, the Saint John's Business Community Anti-Poverty Initiative (BCAPI) is a coalition of senior business and professional community members, working together with people living in poverty to address the root causes of poverty.

They believe that poverty will be reduced if the community as a whole is strengthened. The objective is to address the barriers and issues that fundamentally contribute to the existence of poverty in the Saint John Community. As an organization, BCIPI does not own or operate programs or services. BCIPI works in partnership with many community groups and organizations and, by acting as

a catalyst, has provided new thinking, expertise, financial support, and influence to the issue of poverty reduction.

"After sober reflection of how they could think and act in new ways, the BCIPI framed a vision and set standards for action. They shared leadership by building bridges, improving access, forging partnerships and providing effective problem solving on many issues. By investing time and energy, they enhanced social cohesion and sustained a caring community. They believe that 'less talking and more delivering' is essential in improving the lives of so many," said the Hon. Ermine Joy Cohen, LL.D., (Retired Senator).

The work of the BCIPI focuses on single parent families – representing the largest number of people living in poverty. Covering four key areas – meeting basic needs, removing barriers, building skills and creating economic opportunities – the BCIPI is able to provide assistance to individuals and their families, as well as develop a comprehensive solution to the cycle of poverty with government and nonprofit organizations.

Initiatives that the BCIPI has encouraged and supported include: community academic services, job preparation fairs, childcare registries, trades career awareness strategies, a youth resource center, a residence and integrated services for young pregnant teens, an information dissemination program for youth to help prevent teen pregnancy, in-school daycare facilities, a childhood development program and increased recreational opportunities for children. "Imagine... 100 business leaders organized in one community to eliminate poverty! Saint John is reaping the rewards. Public policy improvements are helping people step out of the poverty trap; new services are breaking the poverty cycle; new programs provide the tools and socio-economic supports people need to build healthy lives, and every sector in our community is involved in and benefiting from these changes... thanks to this initiative, our community is mobilized, synchronized and 'refuses to fail,'" stated Monica Chaperlin, Director, Saint John Community Health Centre, Atlantic Health Sciences Corporation.

## VanCity Savings Credit Union and Planned Lifetime Advocacy Network

### THE CIRCLE OF SUPPORT

VanCity Savings Credit Union and Planned Lifetime Advocacy Network (PLAN) in Burnaby, B.C., have developed a unique program to assure the future security of disabled adults and children.

For the first time in history, people with disabilities are outliving their caregivers in unprecedented numbers. It's estimated that in the next 10 years, close to six million families will be responsible for most of the care of their disabled relatives. According to Statistics Canada, approximately 660,000 Canadians have disabilities severe

enough to require lifelong care and support. The Planned Lifetime Advocacy Network (PLAN) was developed to find a solution. And the support of VanCity Credit Union has helped to increase the awareness and success of the program.

Together, VanCity and PLAN developed a distinctive approach to creating a trust to provide for the disabled person's future housing and independence needs. Together, they assist and motivate families to make a will and do some estate planning. A facilitator is then hired to recruit a "personal network" of volunteers who agree to "be there" in the life of the disabled person. This Circle of Support model has proven so effective that it is being implemented in other communities across Canada.

Each organization provides a range of resources to the partnership. VanCity, through its Community Foundation, provides financial support and distributes information on PLAN to its 250,000 members and staff. It also provides technical assistance and support on charity and tax law, business development and home ownership options for people with disabilities. A matching program for PLAN donors provides incentives and encourages more people to get involved.

With its expertise on the issue, PLAN researches the key concerns of families with disabled relatives and creates profiles of the kinds of financial products and services this market needs. PLAN also refers clients to VanCity's trust services and provides disability needs training for credit union staff and advisors.

Since 1991, this partnership has grown PLAN from an initial membership base of 15 to more than 3,700. It has pioneered a process for assisting and motivating families to complete the will and estate planning process with a 95% success rate. It also inspired the creation of a master trust that generates a higher rate of return in order to fund services for disabled people. Most of all, the program has enabled families to provide for the future welfare of their disabled relative.

## Fairmont Hotels and Resorts and The Canadian Women's Foundation

### ADOPT-A-SHELTER

The Adopt-a-Shelter Program provides much needed goods to shelters for battered women and, much needed funds to the Canadian Women's Foundation for violence prevention programs.

Fairmont Hotels and Resorts (formerly Canadian Pacific Hotels) and the Canadian Pacific Foundation worked in partnership with the Canadian Women's Foundation to develop the Adopt-a-Shelter Program.

In 1996, Fairmont Hotels & Resorts and the Canadian Pacific Foundation approached the Canadian Women's Foundation to

donate used hotel furnishings to women's shelters, rather than give the furnishings to liquidators who pay hotels a minimal amount. But they found that there were other ways they could get involved and provide some real solutions to the funding and resource shortages of shelters.

Together the three partners carefully designed the Adopt-a-Shelter Program, an innovative approach to corporate philanthropy and community involvement. Operating at a national and local level, the program addresses immediate shelter needs and works towards finding a long-term solution for the prevention of domestic violence.

All Fairmont Hotels and Resorts located in Canada and the U.S. and Delta Hotels in Canada are paired up with a local women's shelter. The hotels provide the bedding, furniture and household items to the shelters. Employees of the hotel are also involved in volunteering with their "adopted" shelter. In addition, some hotels have even furnished entire apartments for women and their children when they have left the shelter to start new lives.

At the national level, Fairmont has donated \$330,000 to fund violence prevention programs across the country through the Fairmont Violence Prevention Fund at the Canadian Women's Foundation.

Due to the success of the Adopt-A-Shelter Program, the Canadian Women's Foundation has been able to attract additional support from other companies to further prevent violence against women. The program has also become part of Fairmont's culture. Fairmont's initial three-year commitment has been renewed and expanded to include other Fairmont properties.

## 2003 thINK FOOD: Petro-Canada and The Canadian Association of Food Banks

### thINK FOOD

Turning recycled waste into food – that's the idea behind thINK Food, an innovative collaboration between Petro-Canada and The Canadian Association of Food Banks. Together, they created a project management organization called thINK FOOD. The organization runs an education-based program that generates substantial financial support to buy food, diverts harmful plastic and ink residues from the environment, raises public awareness about hunger and the environment, and influences recycling behaviour.

Each partner brings its own expertise to the relationship. Petro-Canada, in addition to providing financial support, is fully engaged, assisting with business planning, marketing communications, and new launches. The Canadian Association of Food Banks provides expertise and increased public awareness for hunger-related issues, liaises with individual local food banks nationally, and approves the

allocation of program funds. Making it all work, the thINK FOOD project management organization is responsible for the day-to-day operations, public relations and project development work. The success of this partnership has recently attracted additional new national and regional sponsors – including Purolator (official shipping sponsor) and Downeast Communications (regional sponsor for 'Phones for Food').

It takes just a few weeks to turn recyclables into cash for food banks so the impact of thINK FOOD is direct, immediate and effective. Since it started, the program has led to a 218% increase in funds – money that can be spent immediately by the food banks on the greatest needs in their region. It has generated the equivalent of 110,000 pounds of food and diverted more than 65,000 cartridges from landfills. Today, there are over 2,400 collection sites across Canada that collect cartridges and cell phones and turn them into food.

Regular reporting, development meetings, bi-annual strategic planning sessions and frequent opportunities to work together on project events, has led to a program that is greater than the sum of its partners.

"The awareness and support for the thINK FOOD program has grown each month since the Regina and District Food Bank started to participate. We committed publicly to put all of the money raised into fresh milk with a priority of helping families with children five years old and younger. Participating in this program has also given us an opportunity to deepen local relationships. We are very appreciative of the leadership role taken by the Canadian Association of Food Banks, Petro-Canada and thINK FOOD for making this program a success," said Gord Barnes, General Manager, Regina and District Food Bank.

## 2003 Pulling Together: CN and Safe Communities Foundation of Canada

### PULLING TOGETHER

Pulling Together is a national program developed by CN Rail and the Safe Communities Foundation of Canada. It promotes and implements safety programs at the local community level, ranging from children's safety programs in elementary schools, to fall prevention for seniors, to workplace safety projects.

CN and the Safe Communities Foundation share a common mission: to improve and secure community safety. The most effective way to achieve this mission is to empower citizens to take action to ensure public safety in their communities. By combining their resources and efforts, both organizations create tools and resources that mobilize people from all parts of the community. Together, they can reach a wider audience and accomplish much more than they ever could in isolation.

CN provides financial investments, human resources, expertise and in-kind services – including executive participation and employee volunteerism. The Safe Communities Foundation of Canada provides human resources, expertise and skill, vision and direction, access and community engagement, and governance and influence.

The Safe Communities Foundation encourages and enables citizens to come together in their local communities and collaboratively implement vital safety and civic engagement projects with the goal of eliminating the pain and suffering caused by preventable injuries. To date, 35 Canadian communities (in Ontario, Alberta, Newfoundland & Labrador and Nova Scotia) have been designated "Safe Communities", and by working with partners such as CN, the Foundation aims to create and sustain 500 "Safe Communities" in Canada by 2007. Within Ontario alone, 2,600 businesses have participated in this "Safe Communities" initiative and received insurance rebates totaling \$4.4 million.

In addition, these partners established the CN Safe Community Fund – an annual \$25,000 incentive award to encourage communities across the country to incorporate at least three rail safety initiatives in the development of their coalition business plans. Communities are encouraged to design creative, meaningful initiatives and campaigns that promote rail safety and include at least one local school's participation. Recently, 12 Canadian communities submitted proposals they intend to introduce in their communities.

The primary beneficiaries of this partnership include local citizens, emergency measures professionals, community health organizations, students and community leaders, as demonstrated by these statistics, gathered at the local level: a decrease of 7% in emergency admissions in Brockville; a 32% reduction in reported workplace injuries over the past three years in Brantford and Brant County and training in the Young Worker Awareness Program for 400,000 secondary school students.

Pulling Together is an excellent example of what can be accomplished when efforts, resources, expertise and employee volunteerism are shared and combined in a long-term, sustainable and effective manner.

"It is vital to those of us working at the local level to have such strong links between the Safe Communities Foundation and partners like CN. It takes comprehensive and multifaceted approaches supported at the national level to prevent injuries in Brockville & District. For all of us, partnerships are the key to success and we're proud to have over 85 at our table," stated Denise Kall, Co-ordinator, Safe Community Coalition of Brockville & District.

## Calgary Corporate Volunteer Council and The Volunteer Centre of Calgary

### THE CALGARY CORPORATE VOLUNTEER COUNCIL

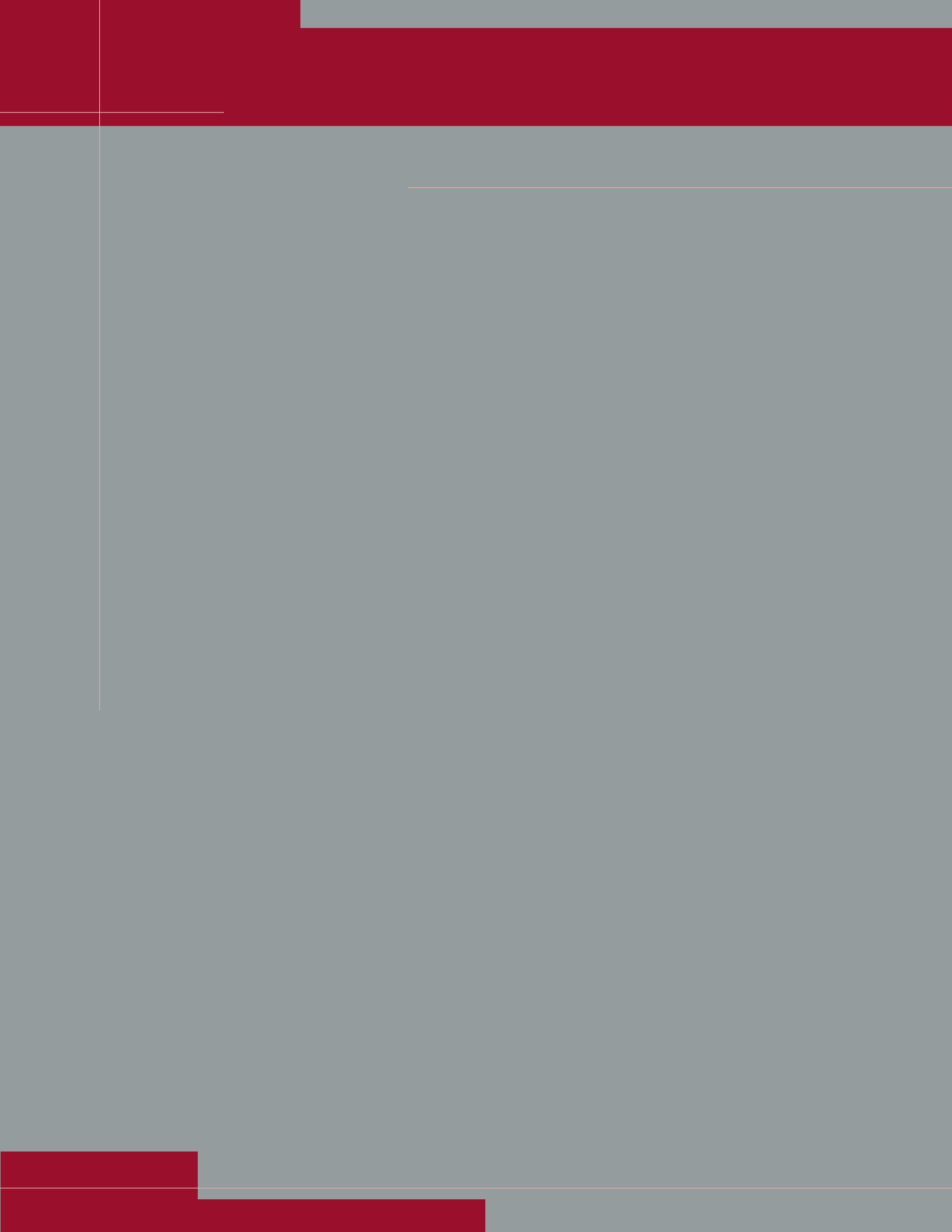
In 1991, nine corporations entered into a co-venture with the Volunteer Centre of Calgary to establish the Calgary Corporate Volunteer Council. The concept was to build effective partnerships between business and the nonprofit sector, to share expertise on corporate volunteer development, to further employee education on the value of volunteering, and to create models that will promote the development of corporate volunteerism programs.

By 1995, the council had grown to include 24 corporate and nonprofit members. Six corporations have designed formalized employee volunteer programs and have entered into partnerships with the charitable sector while other members have initiated or strengthened support for volunteerism. Three companies have initiated retiree volunteer programs. Among the nonprofit members, they have learned new skills in effectively working with corporate employee groups and programs.

"We're really blessed to be working with a number of innovative companies," says Martha Parker, Executive Director of the Volunteer Centre of Calgary. "In terms of their community investment, strategies are being looked at as more than just giving a donation."

NOVA, in addition to being one of the founding corporate partners, is part of the steering committee for the council and works on the design of the volunteer program.

"It's important for us to be involved in the not-for-profit sector because they make our communities better places to live and work," says Sheila O'Brien, Senior Vice-President of Human Resources at NOVA. "We are part of those communities and we have a responsibility."



# COMMUNITY PARTNERSHIP INITIATIVE

## SUGGESTED BUDGET OVER FIVE YEARS

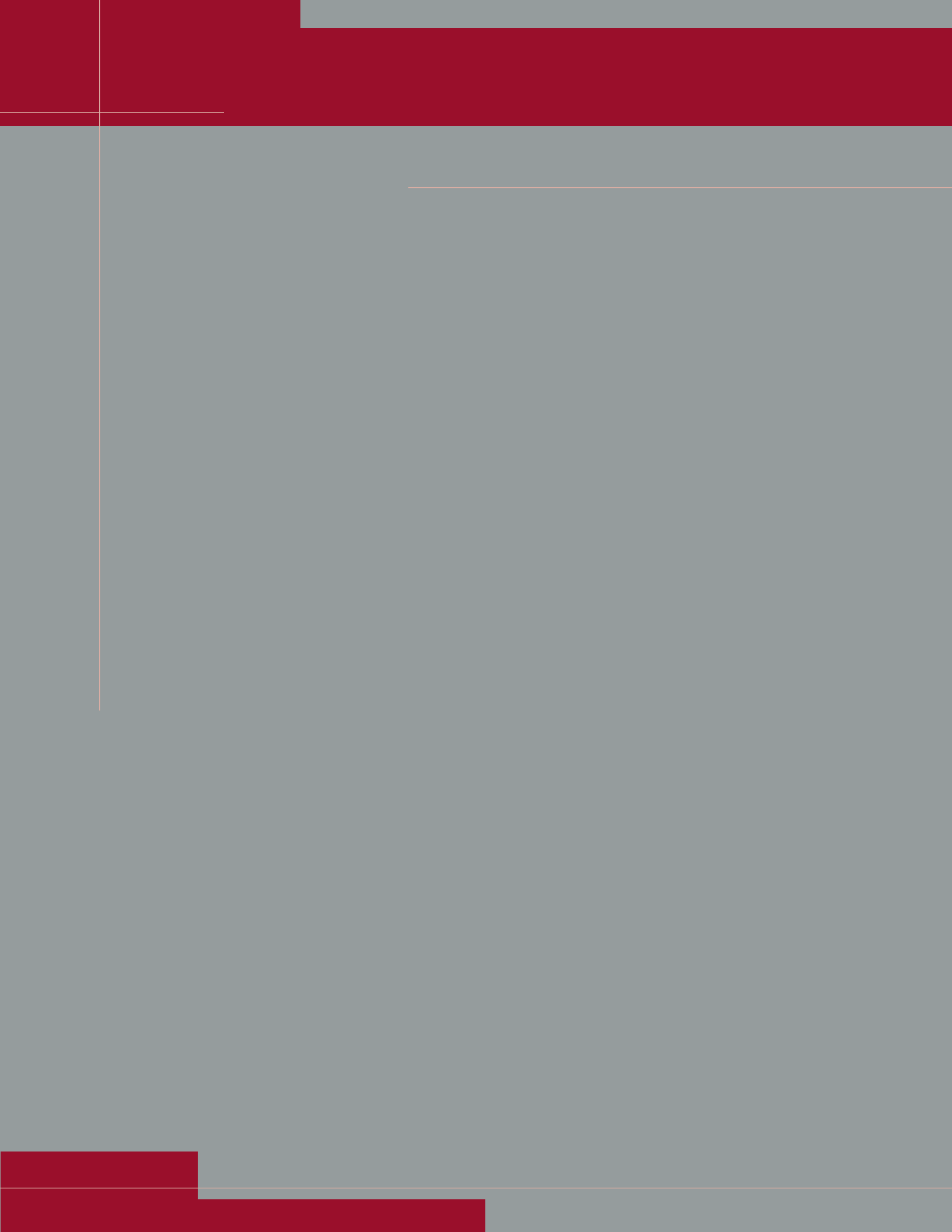
This budget is presented for illustrative purposes only. The scope of work undertaken through this project did not include a detailed analysis of all costs associated with the full implementation of the recommendations.

<p><b>1. Knowledge Development</b></p> <p><b>1a. Knowledge Development Centre</b></p> <ul style="list-style-type: none"> <li>○ Create a knowledge development centre to coordinate national and regional research programs on private sector community investment and business-community partnerships with the voluntary sector.</li> </ul> <p><b>1b. Establish a baseline measure of the effect of business-community partnerships on community investment in Canada</b></p> <ul style="list-style-type: none"> <li>○ Conduct qualitative research to design a questionnaire.</li> <li>○ Conduct quantitative research on the scope and scale of community investment and business-community partnerships.</li> </ul> <p><b>1c. Conduct ongoing research on best practices, learning and emerging issues with regard to business-community partnerships and community investment</b></p> <p><b>1d. Ongoing research on public policy</b></p> <ul style="list-style-type: none"> <li>○ Research fiscal and public policy measures that can encourage greater community investment by business.</li> </ul>	<p><b>\$11,000,000</b></p>
<p><b>2. Information Sharing, Networking and Policy Development</b></p> <p><b>2a. National Roundtable on Community Partnership Initiative</b></p> <ul style="list-style-type: none"> <li>○ Create a roundtable of regional representatives and national intermediary organizations working in the field of business-community partnerships. The roundtable would:             <ul style="list-style-type: none"> <li>● Review and advise on the goals and development of the Community Partnership Initiative.</li> <li>● Make public policy recommendations to the federal government, based on research conducted by the Community Partnership Initiative.</li> </ul> </li> </ul>	<p><b>\$6,250,000</b></p> <p><b>\$1,250,000</b></p>

<p><b>2b. Regional Support Centres</b></p> <ul style="list-style-type: none"> <li>○ Working through a local agency or agencies, the Community Partnership Initiative would provide financial support for the coordination, development and delivery of community partnership initiatives at the local level.</li> </ul>	<p><b>\$5,000,000</b></p>
<p><b>3. Training and Capacity Building</b></p> <p><b>3a. Community Partnership National Resource Centre</b></p> <ul style="list-style-type: none"> <li>○ Establish an online Business-Community Partnership Resource Centre to act as an information clearinghouse, partnership brokerage, and training centre. This should be positioned as the clearinghouse and chief centre for the dissemination of research done by the Knowledge Development Centre, and should provide online training and access to training resources.</li> </ul> <p><b>3b. Training</b></p> <ul style="list-style-type: none"> <li>○ Resource Development Resources to support the development and delivery of training programs should be developed. An advisory group of the National Roundtable group should be formed to advise this initiative. The following resources should be developed: <ul style="list-style-type: none"> <li>● <i>Building Core Competencies</i> Resources for business on effective strategies for community engagement and the benefits of community investment for business. Resources for nonprofits on effective strategies for working with business.</li> <li>● <i>Encouraging Innovation</i> Resources for business and nonprofit organizations to help them understand the potential role of social enterprise and the social economy in general, as a strategy for community renewal.</li> </ul> </li> <li>○ Resource Delivery Resources developed through the training program would be delivered through two mechanisms: <ul style="list-style-type: none"> <li>● <i>E-learning Platform</i></li> <li>● <i>Regionally delivered training programs working in conjunction with local educational service providers</i></li> </ul> </li> </ul> <p><b>3c. Capacity Building Support</b></p> <ul style="list-style-type: none"> <li>○ Community Partnership Initiative Innovation Fund <ul style="list-style-type: none"> <li>● The CPI Innovation Fund would provide support for cross-sectoral initiatives designed to develop and test new and innovative ways of addressing key systemic community challenges such as poverty and homelessness.</li> </ul> </li> <li>○ Seed Capital Fund <ul style="list-style-type: none"> <li>● Capital fund to provide underwriting and start-up financing for social enterprises and social economy initiatives that result from cross-sectoral collaborative initiatives.</li> </ul> </li> </ul>	<p><b>\$79,750,000</b></p> <p><b>\$2,250,000</b></p> <p><b>\$15,000,000</b></p> <p><b>\$12,500,000</b></p> <p><b>\$50,000,000</b></p>
<p><b>4. Outreach and Awareness</b></p> <p><b>4a. Awards program</b></p> <ul style="list-style-type: none"> <li>○ Support awards programs designed to celebrate leadership and innovation in business-community partnerships <ul style="list-style-type: none"> <li>● <i>National awards program with key intermediaries</i></li> <li>● <i>Local and regional awards would feed into national awards</i></li> </ul> </li> </ul>	<p><b>\$3,000,000</b></p> <p><b>\$1,000,000</b></p>

<b>4b. Media program</b> ○ Media awareness program to promote awards and engage journalists on community investment initiatives.	<b>\$2,000,000</b>
<b>TOTAL BUDGET</b>	<b>\$100,000,000</b>
<b>Resources committed in 2004 Federal Budget</b>	<b>\$50,000,000</b>
<b>New resources required for Community Partnership Initiative</b>	<b>\$50,000,000</b>

Community Partnership Initiative: In a similar manner to the Voluntary Sector Initiative, the Community Partnership Initiative is designed to increase the capacity of Canadian communities to meet the challenge of community renewal and development. Based on modest assumptions of a 3–5% increase in corporate support for the community, the Community Partnership Initiative could generate 150–250 million in increased community investment including donations, sponsorships and other forms of in-kind support, e.g. employee release time donations of goods and services.



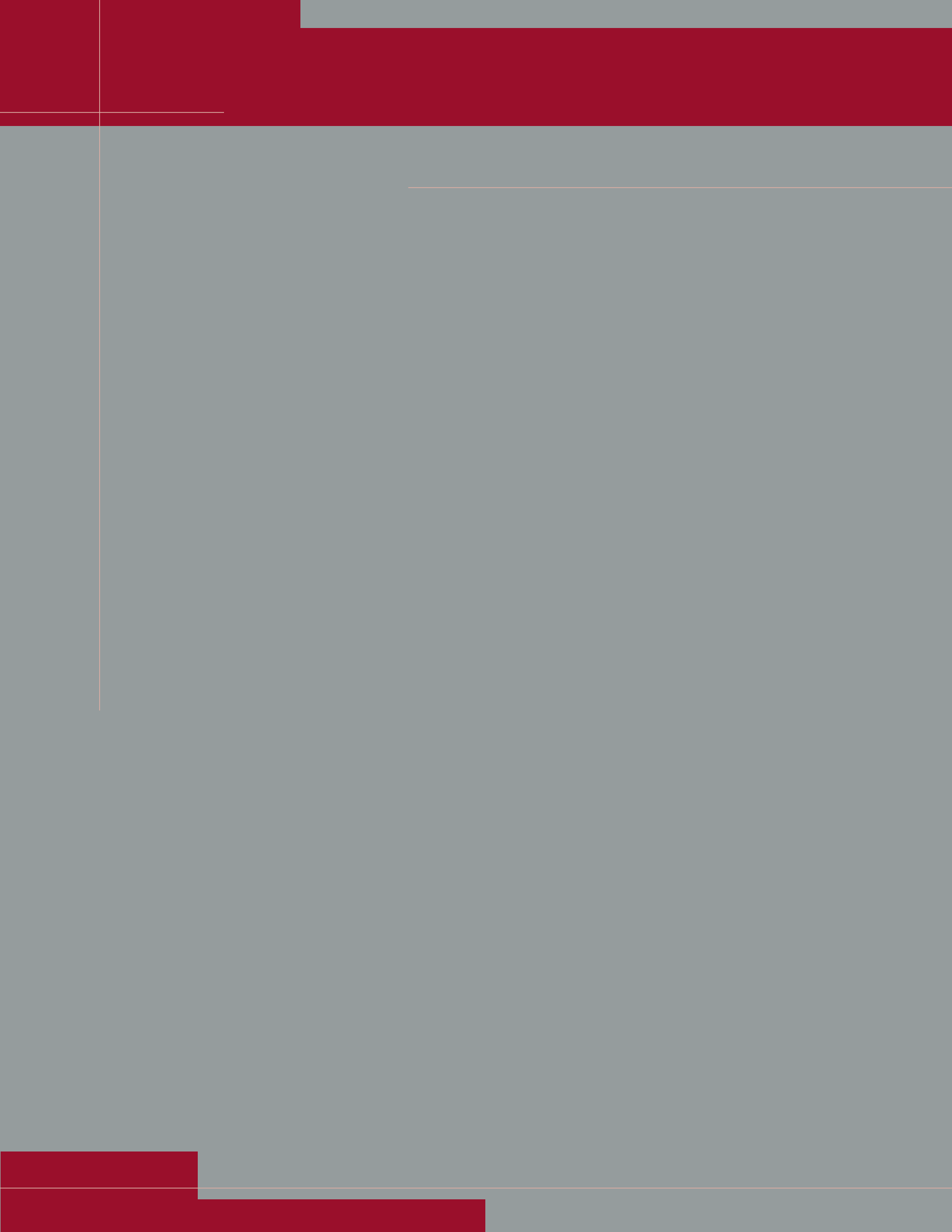
# STEERING COMMITTEE MEMBERS

The steering committee of the Private/Voluntary Forum included the following members:

Organization	Name & Title
Canadian Council of Chief Executives	David Stewart-Patterson, Executive Vice President
Celestica Inc.	Don McCreesh, Senior Vice President, Corporate Human Resources
Chantier de L'Économie Sociale	Nancy Neamtan, Présidente et directrice générale
Conference Board of Canada	Stelios Loizides, Senior Research Associate, Governance and Corporate Social Responsibility
Dalhousie University	Dale Godsoe, Vice President (External)
DuPont Canada Inc.	Colleen Brydon, Manager, Social Innovation Enterprise
Granstream Inc.	Richard Pringle, Co-President and Co-Founder
Heart & Stroke Foundation	Lauralea Conrad, Senior Manager, National Corporate Alliances
Imagine, Canadian Centre for Philanthropy	Chris Pinney, Director Imagine & Vice President Corporate Citizenship
Philanthropic Foundations of Canada	Hilary Pearson, President
Public Policy Forum	Janice Elliott, Visiting Vice President
Public Policy Forum	David Brook, Public Policy Forum Associate
Tamarack Institute	Paul Born, President
TD Financial Group	Scott Mullin, Vice President, Government & Community Relations
The Council for Business and the Arts in Canada	Sarah Iley, President & CEO

*“A 2003 CCEDNet survey of over 300 CED organizations shows CED to be a highly entrepreneurial sector, raising nearly \$1 in investment for every \$1 of government support”*

CCEDNet, CED Funding and Delivery Proposal, Nov. 2003



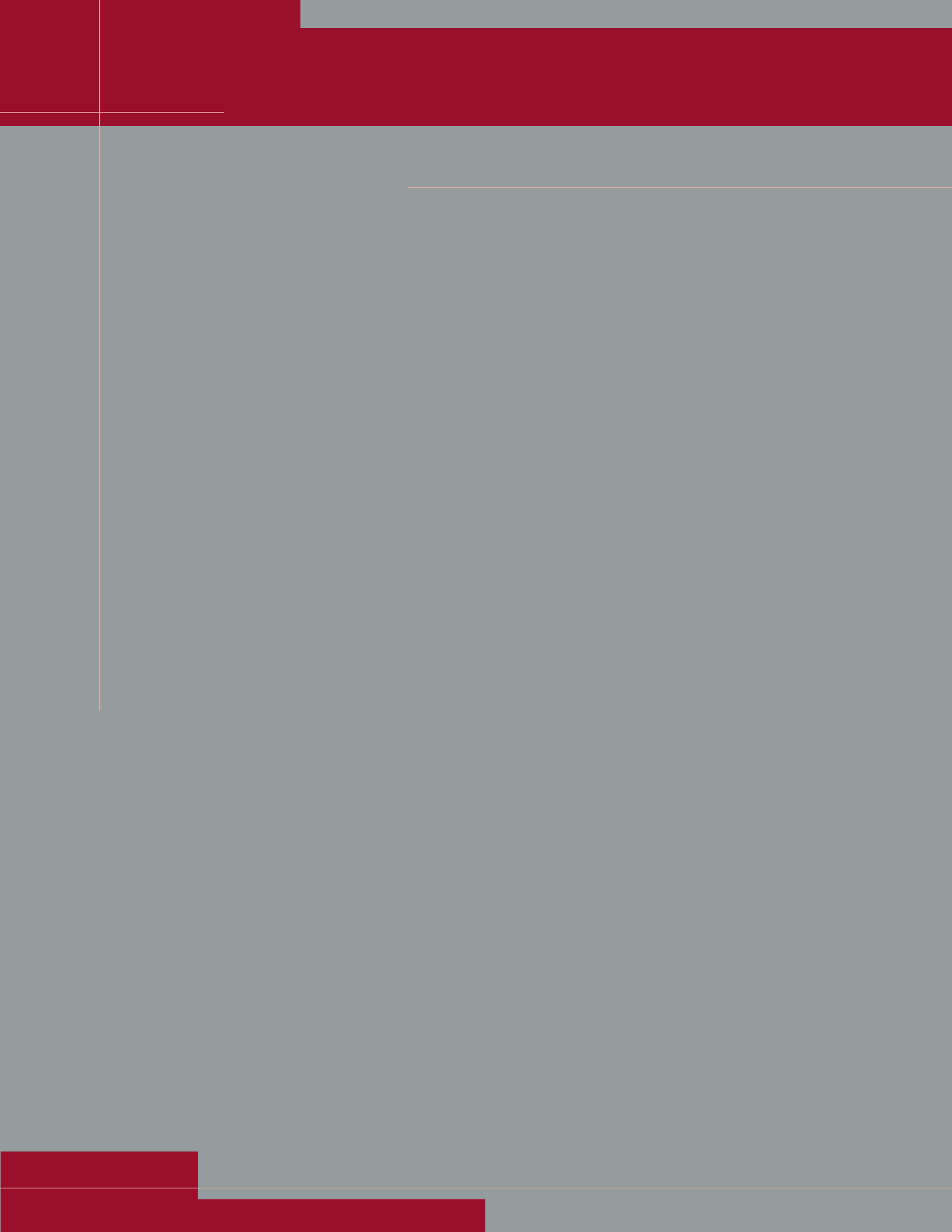
# FORUM PARTICIPANTS

The Private/Voluntary Sector Forum held three meetings since the inception of the program in 2001. Representatives from organizations from across the sectors participated. A complete list of the forum participants and the meetings they attended is provided below. Detailed notes and papers resulting from these meetings can be found on the Imagine website: <http://www.imagine.ca>.

Organization	Name	June 15, 2001	Feb. 25, 2002	May 9, 2003
	David Armour	X		
3 Dimensions Consulting and The Governance Network	Nora Sobolov			X
Aga Khan Foundation of Canada	Nazeer Aziz Ladhani	X		
Bank of Montreal	Nada Ristich	X		
BC Hydro and Power Authority	Bryan Smith	X	X	
Bell Canada	Louise Bellingham	X		X
Bell Canada	Catherine O'Brien		X	
Canadian Centre for Philanthropy	Gordon Floyd	X		X
Canadian Centre for Philanthropy	Michael Hall			X
Canadian Council of Chief Executives	David Stewart Patterson	X		X
Canadian Diabetes Association	Christina Sharp	X	X	X
Canadian Heritage	Robin Leckie			X
Canadian Heritage	Michel Lemay			X
Canadian Heritage	Peter MacDougall		X	X
Center for Training, Investment and Economic	Edward T. Jackson			X
Clarica Life Insurance	Judith Chopra		X	
Community Foundations of Canada	Monica Patten	X	X	
Conference Board of Canada	George Khoury	X	X	
Conference Board of Canada	Mark Schacter			X
Conference Board of Canada	Janice Dixon			X
Co-operators General Insurance	Laura Gregson	X	X	
Corporate Community Relations	Valerie Tibbles		X	X
Council for Business and the Arts in Canada	Sarah Iley	X	X	X
Dalhousie University	Dale Godsoe			X
Dofasco Inc.	Gordon Forstner	X		
Dofasco Inc.	Anita Callura			X
DuPont Canada	Colleen Brydon		X	
DuPont Canada	Chris Degrow	X		
E.Y.E.	Eric Young	X		X

Organization	Name	June 15, 2001	Feb. 25, 2002	May 9, 2003
Enbridge Inc.	Daniel R. O'Grady		X	
Focal Point Research	Robert Ross-Fichtner			X
GlaxoSmithKline	Leanne Kitchen	X	X	X
Go For Green	Stephen Grundy			X
Gordon Foundation	Patrick Johnston	X	X	X
Grantstream Inc.	Richard Pringle			X
Heart and Stroke Foundation	Lauralea Conrad			X
Hewlett Packard Canada	Priya Bates	X	X	
IBM Canada	Catherine Wellesley			X
Imagine, Canadian Centre for Philanthropy	Michelle Brown	X	X	
Imagine, Canadian Centre for Philanthropy	Helen Simpson			X
Imagine, Canadian Centre for Philanthropy	Rowena Santos			X
Innovation Inc.	Sue Simongton		X	
J.W. McConnell Family Foundation	Tim Brodhead	X		X
Kevin McKague Consulting	Kevin McKague	X	X	
Kidney Foundation of Canada	Kim Canary			X
Kidney Foundation of Canada	Gavin Turley	X	X	
Kids Help Phone	Bill Saul			X
Manulife Financial	Donna Lindell		X	
Petro-Canada	Hazel Gillespie	X	X	
Petro-Canada	Sheila Levack			X
Philanthropic Foundations of Canada	Hilary Pearson	X	X	X
PLAN	Rita Morin	X	X	
Public Policy Forum	David Brook			X
Public Policy Forum	Janice Elliott	X	X	X
RBC Financial Group	Anne Lamont			X
RBC Financial Group	Gayle Longley			X
RBC Financial Group	Jacqueline Tuffin			X
RBC Financial Group	Bryan P. Davies (retired)	X	X	
Social Capital Partners	Joanne Norris			X
Social Capital Partners	Bill Young			X
State Street Trust Company	Tim Houlahan	X	X	
Suncor Energy Foundation	Cathy Glover	X	X	
Suncor Energy Inc.	Nick Nikitaras	X	X	
TD Bank Financial Group	Sarah Gould			X
TELUS Enterprise	Darcy Enick			X
TransAlta Corporation	Charlene Boudreau			X
TransAlta Corporation	Sue Tomney		X	
University of Western Ontario	Ted Garrard	X	X	
Volunteer Calgary	Martha Parker	X	X	
Volunteer Canada	Kristin Smith		X	X
Women's Future Fund	Chryse Gibson			X
World Vision Canada	Marilyn Friedmann			X





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