



# National Summit

for the Charitable and Nonprofit Sector

Strengthened connections.

Enhanced collaboration.

Collective Impact.

## NATIONAL SUMMIT REPORT

**FEBRUARY 2012**

This report documents five key outcomes of the National Summit for the Charitable and Nonprofit Sector held in Ottawa, November 28-30, 2011. It also charts the path forward for each of the four Priorities for Action that were considered and advanced by more than 500 leaders through in-person and online engagement during the Summit.

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# NATIONAL SUMMIT REPORT

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## KEY OUTCOMES OF THE NATIONAL SUMMIT

### **Recognizing charities and nonprofits as a sector: “We are a sector and need to work as one!”**

The National Engagement Strategy is about enabling charities and nonprofits to have positive and lasting impact in communities across Canada and around the world. The 2009 community conversations, the 2010 provincial and territorial events, and the 2011 National Summit, enabled more than 1,100 charities and nonprofits to come together and confirm that they have much in common and that they are part of a vibrant and contributing sector. The first key outcome of the National Summit then was confirmation that we belong to something bigger than the individual organizations or movements for which we work or volunteer.

The atmosphere in the room and online during the Summit was palpable as participants discovered that regardless of geography, age, language or organizational size and focus, what unites us is greater than that which divides us. This realization had been building as we criss-crossed the country in 2009 to pursue community conversations about the decade ahead and as we discussed and validated the drivers of change through provincial and territorial conversations in 2010. It crystallized at the National Summit, where more than 500 leaders were able to affirm the value of our collective efforts and assets.

The Summit solidified how similar our challenges are regarding financial sustainability, attracting and retaining a continuum of paid and volunteer talent, and communicating our contributions and impact. This widespread recognition is critical to our future efforts to speak with strong united voices and work collaboratively in the years ahead.

“The energy in the room at the end of the priority group discussions was palpable and infectious. It was clear that summit attendees left reenergized and motivated to not only continue the excellent work that they do in their communities, but to innovate and grow.”

Nicole Bélanger,  
Fundraising Assistant,  
The Wabano Centre for  
Aboriginal Health



## **Leading collaboratively at the national and local levels: “We can and must work together for greater impact!”**

Seeing ourselves as a sector, while a significant outcome, is insufficient to bring about the change in mindset needed for us to fully leverage our collective assets for the benefit of communities. We also need to *act* like a sector and model the collaborative leadership that is critical to our collective success. Another key outcome then, was the modeling of collaborative leadership in the planning, financing and execution of the Summit.

The community conversations and the provincial and territorial events required us to develop strong relationships of trust with organizations across the country. In building the strategy from the ground up, we relied on the networks, knowledge and resources at the local and provincial levels which in turn laid the groundwork for the display of collaborative leadership at the Summit. The success of the 2009 and 2010 events is largely thanks to the efforts and engagement of organizations on the ground. They used their power of convening and their in-depth understanding of local and provincial actors to bring the sector together one community and one province after the other.

When it came time for the National Summit, rather than go it alone, Imagine Canada welcomed [Community Foundations of Canada](#), [Philanthropic Foundations Canada](#) and [United Way Centraide Canada](#) as co-hosts. All four co-hosts leveraged their networks, expertise and resources to ensure the success of the event. Staff and volunteers from these organizations worked seamlessly to deliver on all aspects of the Summit. The end result was much more successful than any of us could have achieved independently.

Similarly, twelve co-leads, from across the country and across the generational divide, worked together for many months to plan and design the working sessions for the four priority areas. Lessons were learned by all regarding how to do it better or differently in the future. However, there is little doubt that the working group sessions were enriched by the significant time and energy that the co-leads committed to the process of providing pre-Summit engagement opportunities and using technology to heighten the exchange.

The modeling of collaborative leadership also extended to the ways in which funders engaged in the Summit. The primary funders of the Summit, the [Agora Foundation](#), the [J.W. McConnell Family Foundation](#) and the [Ontario Trillium Foundation](#), engaged informally with the co-hosts throughout the planning process in ways that strengthened the end result. The Ontario Trillium Foundation was also instrumental in catalyzing the partnership among the co-host organizations. Foundations and organizations modeled collaborative leadership through their overwhelming financial support for the presence of young leaders at the event. Organizations from across the country took up our call and collectively sponsored more than 80 Summit participants between the ages of 18 and 35. The entire Summit was put on by the sector for the sector, with no substantial government funding, and welcome but limited dollars, from corporate partners.

Collaboration was also a central theme of the Summit plenaries, including the debate in which established and emerging leaders brought thought, humour and common sense to the question of whether collaboration enhanced or hindered organizational impact. Interestingly, the audience was split 50-50 when asked to identify post-debate which argument most resonated with them. Similarly, keynote speakers, including the closing speaker, Julie Payette, sponsored by [Miller Thomson](#), all emphasized collaboration in one form or another, keeping this topic front and centre.

The collaborative leadership that marked the Summit had a cascading effect in that local leaders emerged during and after the event to bring together colleagues who lived in the same city or province or who shared similar interests. Colleagues from Saskatchewan and London met at the Summit to consider how they might work locally and provincially to advance one or more of the four priorities for action. Other colleagues in Vancouver, Prince Edward Island and Edmonton have already planned or are planning to meet to move the yardsticks in their communities and are pursuing local solutions to local priorities that are nonetheless aligned with and support the sector's pan-Canadian agenda. **Please share information about the post-Summit events that you are organizing or that are taking place in your community or province, by writing to [Brenda Cameron Couch](#).**

Similarly, several colleagues hosted hot topic tables to discuss issues ranging from financing to governance to regulatory issues on the second morning of the Summit. The number of leaders who self-identified to lead discussions on specific issues is testament to the sector's willingness to take ownership of the agenda and work collaboratively to achieve positive change. **We invite those who led hot topic discussions to let [Brenda Cameron Couch](#) know if and how these conversations are being pursued post-Summit.** We welcome the chance to profile in our Summit updates the collaborative efforts that may be emerging and the lessons learned.

**Engaging fully the next generation of leaders: “We need intergenerational leadership to succeed!”**

When the National Engagement Strategy was first conceived, no particular thought was given to the role of young and emerging

People who are animated by their passion for a cause – whether it is in exploring the depths of outer space, in fighting poverty or preventing drowning aren't all that different. They all share a common, fundamental desire and drive to chase a dream. Julie Payette was able to illustrate this point using the International Space Station as an outstanding example of what people could achieve when working collaboratively towards a shared goal. This metaphor for collaboration was certainly an 'Aha!

moment in my mind and one that made me realize, once more, how necessary (and essential) partnerships are in this sector.” Matthew Morantz, Founder and Executive Director of Making Waves Canada

leaders in defining the future we want and in mobilizing for change. While young leaders were present at some of the community conversations and some of the provincial and territorial events, they were in the minority, relegated to supporting roles or forced as individuals to speak on behalf of an entire generation. In many instances, those who had worked in the sector for one or more decades would ascribe freely values, expectations, motivations or behavior to the next generation of leaders, without these leaders being present in meaningful numbers to speak for themselves.

Having recognized this shortcoming, the National Engagement Strategy Advisory Committee identified the recruitment of young leaders to the Summit as a priority. The committee challenged us to boost the initially proposed target for the participation of young leaders from 40 to 80 participants. This seemed a tall order at the time given that many of these young leaders were unknown to us, may have limited or no travel budgets, and/or may not be considered by their organizations to be top priority attendees. Nonetheless, the challenge was accepted and Amanda Mayer, a young leader herself, was given the lead in both recruiting young leaders and in helping them to identify sources of support, where needed, for their participation.

In the end, a key Summit outcome was the successful recruitment and engagement of young leaders in a way that integrated them into an intergenerational conversation about the future of the sector. Young leaders from both Imagine Canada and in partner organizations consulted in the design phase suggested that they were not interested in only having exchanges among themselves but rather sought to engage with established leaders who were charting the path for their organizations and the sector for the decade ahead. As a result, care was taken to ensure that young leaders would be fully integrated into all aspects of the Summit and provided opportunities before and during the event to engage both with other young leaders and with all Summit participants.

More than 100 young leaders participated either in person or online in the National Summit. Via the National Summit website, a pre-Summit webinar hosted by the four young co-leads, and opening receptions sponsored by [Mackenzie Investments](#) and [PricewaterhouseCoopers](#), young leaders were able to introduce themselves to one another, to local members of

“My overall impression of the summit, if it could be summarized in one word: transformational.

Imagine Canada truly believes that engaging young people not only during the Summit but in the design of the Summit itself can have a lasting effect for Canada’s nonprofit sector. This really is about the next generation of donors and community builders – through participation in the Summit, my takeaway was deeper engagement with emerging leaders”.

Vinod Rajasekaran,  
Executive Director, Hub  
Ottawa

[MESH](#), a network for young nonprofit professionals in Ottawa, and to other Summit participants. As Fabienne Brulhart explains: “When I first arrived at the reception in the Penthouse Suite, I was quite overwhelmed by the amount of people in the room, feeling a little left out and intimidated...but people just casually walked up to each other, introduced themselves, exchanged information... This reception set the standard for the rest of the Summit in that I felt confident to enter a room with 500 people (we don’t get that too often in Whitehorse) and talk to anyone I want to.”

The young leaders’ views and opinions were also central to the pre-engagement and on-site work on the four priorities for action. For each Priority for Action, a young co-lead was identified and contributed to the scope and content of the working group sessions. These same young co-leads were also invited to publish their thoughts about the priority they were working on in a [special edition of the Philanthropist](#) shared with participants. The Summit co-hosts are committed to ensuring that young leaders have prominent roles in the next phase of the National Engagement Strategy as well.

Many long-standing leaders of charities and nonprofits as well as recent arrivals remarked about the extent to which the mix of young and more established leaders gave the Summit reception, plenaries and working sessions a very different feel and tone. The presence of the next generation of leaders also enhanced the ethnic diversity of participants, though many noted that this was an area on which the sector still needed to improve significantly both among young and established leaders. The need to consciously engage a greater diversity of Canadians both as staff and as volunteers was recognized as an important challenge by Summit participants in Priority Four as well as by many in the plenary sessions.

True intergenerational engagement also means being prepared to both listen to, and, act upon, the suggestions made by the next generation of leaders. For instance, in the evaluations, some young leaders noted that the designation of young and emerging leaders did not sit well with them. In some instances, this was because although they were young, they already saw themselves as leaders, not emerging ones. In other instances, being called a young leader when one is nearing 35 seemed to

“Often I attend meetings which proclaim ‘the importance of youth’ but I have never been to an event where a young leader (let alone an artist) literally set an aspirational bar for the entire proceedings”.

Ken Mayhew, former Chief Development Officer of the MS Society and now president of the William Osler Health System Foundation

negate the significant experience and knowledge already acquired to date. As one Summit participant wrote on the evaluation: “I felt that identifying ‘young leaders’ was a step forward, however, it was overemphasized throughout the Summit and it began to feel like a pat on the head. If anything, it detracted from the weight my comments had when discussing the priorities in groups.”

In the next phase of the National Engagement Strategy, we will heed this feedback to define young leaders’ engagement in ways which empower – not diminish or ghettoize – their contributions. We invite all Summit participants to recruit more young leaders in their organizations or communities and beyond to participate in the National Engagement Strategy. This will further round out the complement of cutting-edge innovators who are informing the next phase of our collective efforts.

**Leveraging the diversity and ubiquity of the sector:  
“Everyone has a contribution to make!”**

From our review of the evaluations and the testimonials, another key outcome of the Summit was the extent to which it represented the dazzling plurality of mission, size, geography and cultures embodied by the sector. The Summit sought to be authentically inclusive on several fronts. Given the national scope and location of the gathering, we were committed to giving more than lip service to official bilingualism. From the opening slam poetry performed by our emcee, Nathanaël Larochette, through to our closing keynote speaker Julie Payette, we sought to ensure that all aspects of the Summit were inclusive of both of Canada’s official languages.

As well, from the very start of the National Engagement Strategy, John Hodgson, Chair of the Agora Foundation whose vision kick started the NES, challenged Imagine Canada to ensure that small organizations would be engaged and benefit from efforts to strengthen the sector’s collective voice. Through dedicated outreach via a wide array of networks, more than 20 per cent of Summit participants were attracted from small organizations from across the country. The online component of the Summit and the [web site posting of video of the plenary sessions](#) is also extending the reach of the Summit content to many more smaller organizations for whom in person participation was not feasible.

“It was an immense privilege to hear the words of advice and encouragement from notable and diverse speakers...yet beyond listening carefully to those who’ve come before, what will stick with me most as I go forward in my work in the sector – and indeed in my career – is the power of dialogue, of open-minded colleagues digging seriously into the difficult issues that concern us all and that are not easily resolved. It was inspiring to build through rigorous discussion, innovative next steps that will address our sector-wide concerns around funding and explaining the work

we do”. Schuyler Playford, the Causeway Work Centre

The organizing team also reached out to traditionally underrepresented groups such as the arts and environmental organizations. While we would have liked to attract more colleagues from these groups, those who attended noted that their contributions and perspectives were well-integrated. As Alain Pineau acknowledged in his thank you to Emmanuelle Hébert, everything from the choice of emcee, to the networking dinner at the National Gallery of Canada, to the inclusion of MU on the program, made the Summit a rare sector event that fully embraced the presence and the vibrancy of the arts community. Similarly, our Summit interaction with colleagues from environmental organizations has laid the foundation for enhanced communication and joint engagement on key issues like foreign funding of charities and the role of charities in the public policy process. We invite all Summit participants to bring more colleagues from under-represented groups into the tent and we will continue to do so as well in the design of the next phase of our efforts.

Summit interactions allowed us all to see the great diversity of causes that we represent and perspectives that we bring as an asset, rather than a liability. As Jerie Shaw of the Community Forward Fund remarked: “It is valuable to step back and realize that the sector is extremely diverse and what seems self-evident to some may not be the obvious answer for others. I had the opportunity to sit and talk with representatives from large charities, small organizations, nonprofits focused on international development and others focused on issues here at home. Everybody I spoke to had a unique perspective and at least one or two great ideas for how we can further our sector to do the greatest good in society”. There was also a strong recognition that every sector leader who participated in the Summit can make a significant contribution to strengthening the sector, simply by starting in his or her own organization or community. As Geneviève Gazaille explains: « Je crois que s’il n’y avait qu’une chose que les participants au Sommet devaient mettre en pratique suite à leur participation à l’événement, ce serait d’implanter une mesure organisationnelle, que ce soit l’adoption d’une politique de recrutement de bénévoles ou un plan de communication, et de la promouvoir, afin de démontrer aux Canadiens que le secteur sans but lucratif est organisé et essentiel au développement de leur communauté et de leur pays. »

### **Taking risks with technology to heighten interaction: “We can and will leverage technology effectively!”**

During the community conversations and provincial and territorial events, many colleagues noted that the sector was widely recognized for its ability to leverage its vast networks to engage people across sectors and geography. However, many also suggested that new technologies were challenging our traditional strength in networking. Many told us that they did not feel well-equipped to leverage new technologies and social media strategically. Organizations also said that while everyone was urging them to innovate through technology, few could afford the potential reputational risk if the technology should fail at an inopportune moment or if their attempts to engage stakeholders online proved unsuccessful.

To model the behavior the sector needs to adopt to thrive over the next decade, the Summit co-hosts decided to use technology extensively throughout the event, despite the inherent risks of it failing or not being deployed optimally. The success of the technology portion of the event also required a leap of faith from the Agora Foundation. It provided additional financial support to properly fund the technical requirements and support the planning and deployment of the technology.

Another key Summit outcome is thus the integration of technology to both heighten the interactivity for face-to-face participants and extend the reach of the Summit to both participants and speakers who would have been unable to join us. For example, Naheed Nenshi, the Mayor of Calgary, was able to address participants in real-time despite a scheduling conflict that prohibited his in-person appearance. His presentation via Skype was every bit as compelling and garnered the highest engagement rating on the evaluation forms. Several people noted in the evaluation that the use of technology in the plenary sessions enabled both in-room and online participants to pose a wider array of questions to keynote speakers in a more efficient way. It also allowed the organizing team to capture participants' real-time questions and comments and to later redistribute them to all to inform our ongoing thinking and actions on these issues. Overall, the use of technology in plenary was very well received.

The response to the use made of technology during the working group sessions on the four priorities for action was split. Many noted that it allowed participants in the room to gain quickly a more comprehensive sense of the discussion at other tables. It also enabled us to capture all of the raw data from hundreds of table conversations for subsequent review and analysis by all of the 500 participants. The efforts of the theme teams met with mixed reviews, due not to the analytical prowess of the "themers", but to concerns that the emphasis on common denominators would leave some of the gems or dissenting opinions on the cutting room floor. As one participant noted in the evaluation: "The technology was useful for aggregate information but not in immediately capturing some of the great 'outlier' ideas." Or as another noted: "I loved the networking and sharing ideas on my priority but the consensus building was forced and did not reflect the conversation".

These challenges were less a reflection of the technology itself, but of the design. It was a struggle to balance the need to move each working group to actionable, ranked pan-Canadian goals with the need to explore ideas that were not widely held or understood but that could lead to new understanding or opportunities. This same tension was reflected in the Summit evaluations. Some participants who wanted to get to a clear plan of action, felt that not enough prioritization and narrowing down of actions was achieved. Others, who were more focused on exploring new ideas, felt that they had been encouraged to achieve consensus too quickly.

Most online participants were very appreciative of the opportunity to engage from afar. In-room participants' evaluation forms also indicated strong support for the online offering. Many noted

that the sector should do this more often. In our post-Summit debrief of the online component, staff made a number of suggestions to help capitalize more on the online component the next time around. In future, we will consider marketing the online Summit in parallel with the face-to-face Summit, rather than as a staggered offering once all the in-room seats have been sold out. We will also ensure that each aspect of the offering maximizes online participants' interaction not just with each other, but with in-room participants. And finally, we will consider combining online participation in a national event with local face-to-face gatherings to increase both the sector's comfort level with the technology and colleagues' sense of engagement in the process.

This was the first time that the [CoVision](#) approach had been deployed on such a significant scale in Canada. Many colleagues noted their interest in using the technology for other events at the national, provincial or local levels. We have learned many helpful lessons through the design and deployment of the technology and are available to share insights with anyone considering the use of this approach for upcoming events. We are also incorporating the lessons learned in the next phase of our National Engagement Strategy efforts.

We also used social media to heighten the reach and impact of the Summit. The [Social Media Crew](#) unleashed its collective savvy taking on roles that ranged from blogging and tweeting to taking photographs and conducting mini-interviews. They used a range of platforms such as [Twitter](#), LinkedIn and Facebook, leveraging both Imagine Canada's substantial following and those of partner organizations. A Twitter Fountain that ran during breaks and meals provided real-time response to events as they unfolded.

Before, during and after the event, these efforts created a sense of excitement and a buzz about the Summit; seeded and facilitated dialogue; enabled attendees to connect with their in-person and online peers; and created a permanent record of conversations and activities. Journalists were also embedded at the event, including those from CharityVillage. They prepared a [special edition of Village Vibes](#) which reaches a readership of 30,000 subscribers. An article was also included in Canadian Fundraising and Philanthropy, shortly after the Summit.

The key to success I  
feel will be the  
commitment of  
individual leaders and  
organizations to take  
responsibility for  
action. We can't  
download all the work  
to Imagine Canada or  
one institution".  
Summit participant

## NEXT STEPS

### **PRIORITY ONE: IMPROVED CONDITIONS FOR THE ATTRACTION AND RETENTION OF PAID STAFF**

The [HR Council for the Nonprofit Sector](#) has been a partner in the National Engagement Strategy since its inception and expects to assume responsibility for facilitating follow-up on Priority 1. Given its substantial contributions to the sector's understanding of HR issues, the HR Council is well positioned to lead this work. As Summit participants know, however, the HR Council is entering a time of transition and transformation as it moves from being one of many sector councils funded primarily by the federal government to becoming a more financially independent entity with even closer ties to sector organizations.

#### ***A thriving HR Council***

During the working group sessions on Priority 1, there was widespread recognition of the importance of supporting the HR Council through its transition so as to preserve its strategic assets. The HR Council is planning for a sustainable future and has begun to meet with partners throughout the sector to identify elements of support that can help the organization make a significant shift in its operations. The organization will continue to seek support and was greatly encouraged by the expressions of interest voiced at the Summit. **Participants who have expertise or resources to contribute during this transition phase are invited to contact [Gay Hamilton](#).**

When the Summit co-hosts met to discuss post-Summit follow-up there was strong support for making the re-incubation of the HR Council -- through the engagement of key players from across the sector -- a key goal for 2012 in advancing Priority 1. The co-hosts are writing jointly to the HR Council to express their support and to request an opportunity to meet to discuss how the emerging agenda of the HR Council can best be aligned with the post-Summit actions that were identified by Summit participants. The letter will speak to the importance of ensuring a thriving HR council and of preserving and growing the HR Council's strategic assets, such as a resource packed website that, while vital for all sector organizations, is particularly essential for small- and medium-sized organizations.

#### ***New HR management resources for the sector***

Even as the focus in the immediate term is on the re-incubation of the HR Council for the sector by the sector, the HR Council is pursuing in 2012 a number of initiatives that align well with Summit participants' wish list of vital next steps to strengthen the sector's management of, and support, for its paid staff. In the ranking exercise, Summit participants in the HR working group sessions identified the need for quality HR information and support for the implementation of effective HR management policies and practices as one of the key outcomes sought. In addition, Summit participants acknowledged the need for an education campaign about the sector, HR and pay that is aimed at the sector itself, funders, donors, partners and the public.

The latter outcome will be achieved in part through the efforts of those working on Priority #3, Better understanding of the sector and impact. Both the immediately available Qs and As and the longer term development of the new narrative for the sector (see Next Steps on Priority 3) will go a long way to addressing these concerns. The former outcome will be achieved in part by the HR Council as it continues to work with sector partners who are leading labour force initiatives at the provincial level and as it completes a number of recent initiatives designed to produce increasing information about, and support for, the sector's human resource management. For example, the HR Council website, in particular the HR Toolkit, continues to be improved and updated and remains available to the sector free of charge. **Summit participants can access the HR Toolkit [here](#).**

In addition, this year will see the completion of a number of projects that line up well with Summit participants' aspirations for quality HR information and support:

- An ongoing forum for convening partners from across the country to discuss labour force initiatives has been undertaken through the Building Cohesion in Labour Force Strategies Project.
- The Skills and Leadership Development in Canada's Nonprofit Sector Project seeks to understand the state of skills development. It also delves into questions about a leadership deficit and, finally, develops an occupational standard for administrators of volunteers.
- The Increasing Diversity in Canadian Nonprofits Project is identifying the key issues that are preventing nonprofits from accessing the talents of new immigrants and Canadians from diverse cultural backgrounds.
- Finally, the HR Council has just embarked on the second phase of its work aimed at improving access to good labour market information for the sector. This project will likely add 8-10 new information pieces to the website over the next year.

**Summit participants are encouraged to check the HR Council's website frequently for updates on both those projects that are nearing completion and for which final reports will soon be available, as well as for new projects to be launched in the coming months.**

The HR Council will engage the co-leads for this priority area, Marlene Deboisbriand, Bob Wyatt and Miia Suokonautio in thinking about how best to align the next phase of the HR Council's efforts with the most highly-sought outcomes identified by Summit participants.

**Summit participants are encouraged to write directly to [Gay Hamilton](#) at the HR council to share their thoughts about the next phase of this effort.**

## PRIORITY TWO: MORE DIVERSIFIED AND SUSTAINABLE FINANCING OF THE SECTOR

Discussion of this priority area included four distinct, but mutually reinforcing, streams: philanthropy, grants and contributions, earned income and financial literacy. There has been ongoing follow-up since the Summit on the first two streams, particularly the Philanthropy stream given the federal hearings on incentives for charitable giving that have demanded a great deal of concerted and coordinated effort on behalf of the sector in early 2012. Further convening to identify lead organizations for the third and fourth streams will take place this spring, once the federal budget has been tabled. We will be working closely with Derek Gent, Hilary Pearson and Adam Spence, the three co-leads of this Priority area at the Summit, to determine the best venues and means to pursue these efforts.

### *Philanthropy*

On the philanthropy front, participants identified advocacy to promote the inclusion of the [Stretch Tax Credit for Charitable Giving](#) and the capital gains exemption for gifts of real estate in Budget 2012 as a top outcome sought. There has been significant movement on this front as organizations across the sector, in partnership with Imagine Canada, have worked to raise awareness of, and support for, the [Stretch Tax Credit](#) proposal with federal officials and politicians. On December 1<sup>st</sup>, Imagine Canada's Day on the Hill, a number of sector leaders met in small groups with senior officials and politicians from both the government benches and the opposition to discuss the priorities that had emerged from the National Summit and to promote the inclusion of the Stretch Tax Credit in the next budget.

In December and again in January, Summit participants were invited to write to their local MPs to express their support for the Stretch Tax Credit and to explain the impact that this measure would have on their organization and their community. A number of MPs told us that they have been approached by charitable organizations in their ridings and many more are now aware of the Stretch Tax Credit proposal. NDP and Liberal members of the House of Commons Finance Committee formally endorsed the Stretch Tax Credit in their minority reports on the Committee's pre-budget consultations. Thank you to all who have followed up on this invitation to action. **Those who have been meaning to send a letter can still do so, by using this [template](#) as a guide.**

In mid-December, Michelle Gauthier and Susan Manwaring convened colleagues from across the sector who planned to engage in House of Commons Finance Committee's hearings on charitable giving. More than 80 leaders from across a broad array of sub-sectors have participated in the working group established to ensure strong consistent messaging in both the written briefs and the presentations to the Committee. Through bi-weekly teleconferences and other means, intelligence about the process, summaries of the proceedings as well as a wide range of Qs and As (see Priority 3 for details) have been developed and shared with working group participants.

Thanks in part to this collaborative effort, the tone and content of the hearings to date have been remarkably positive and rich. The members who sit on the Finance Committee have displayed genuine interest in understanding more fully the current system for incentivizing charitable giving and discussing the merits of a number of proposals, including the Stretch and the capital gains exemption for gifts of real estate, identified as priorities by Summit participants. The hearings have allowed the sector to enhance key decision-makers' and opinion-leaders' understanding of the impact that charities and nonprofits have in the communities in which they operate. They have also given sector organizations an opportunity to explain how they invest resources that they attract in a transparent and accountable manner and how they engage responsibly in the public policy process. This is an important step to address the other key outcome on the philanthropy front identified by Summit participants, that of enhancing public perception of charities and their positive impact on society.

Many sector leaders who participated in the Summit, including the four co-hosts, have or are scheduled to appear at the hearings which began on February 7. The briefs submitted to date, together with the official transcripts of the February hearings, are available on the Finance Committee's [website](#). **Anyone who plans to engage in the hearings and would like to contribute to our sector-wide effort to maximize the value of this exchange with MPs is invited to join the working group by contacting [Michelle Gauthier](#) or [Bill Schaper](#).**

The hearings have been temporarily interrupted as the Committee must consider other legislative business referred to it by the House. Although the hearings will only resume in late March or early April, once the federal budget has already been tabled, we continue to press for the inclusion in this budget of one or more measures that would assist the charitable sector to expand and renew the donor base and promote civic engagement. Summit participants will receive an update on our plans for budget night 2012 and its aftermath, in March.

We are also exploring how we can best assist organizations that rely heavily on government funding in the wake of the federal budget, the strategic and operating review and the provincial budgets that will be announced this spring. **Summit participants who wish to share information about how government funding decisions will affect their organizations or who wish to offer resources to support organizations through this time of transition are asked to contact [Michelle Gauthier](#).**

### ***Grants and contributions***

Efforts have also been made to take Summit participants' messages on grants and contributions directly to those who are charged with the implementation of the next phase of the federal government's [Action Plan](#) on grants and contributions. Imagine Canada met with officials at Treasury Board (the federal department with overarching responsibility for grants and contributions) in January and again in February to pursue the conversation about the government's efforts to improve the administration of these programs. Officials expressed strong interest in receiving a copy of the National Summit report as well as the detailed data

from the working group sessions of Priority 2 which will help them identify some key client-facing outcomes for the next phase of the reform effort. We relayed in particular the concerns expressed about the need for multi-year funding, full cost-recovery and standardized applications and reporting forms.

During the exchange, we reminded officials of Imagine Canada's statement on federal funding trends, first developed in 2010 and shared again with ministers and senior officials after the 2011 Election. This [document](#) outlines key principles that should be respected whenever federal funding decisions are being made. We also emphasized that one critical area in which the government could improve its track record in the immediate term, is to ensure that when charities or nonprofits are successful in attracting grants and contributions, the money be delivered when promised, and not many weeks or months later. We explained that this has been a perennial challenge for organizations and leads to the loss of human resources required to deliver on the funding received, can cause significant interruptions in services or supports to clients and citizens, and undermines the relationship of trust between grantees and funders. Officials heard our message and will consider how this sector-wide concern can best be addressed as they begin Phase 2 of their reforms.

### ***Earned income and financial literacy***

Longer term work is required on the third and fourth streams of the Financing Priority, those of earned income and financial literacy. Imagine Canada sees its role as one of mainstreaming the key concepts and activities associated with earned income, social enterprise and social finance. The goal is to ensure that this form of financing becomes increasingly feasible for a wide range of charities and nonprofits to embrace and implement either for the first time or more extensively. We also believe we have a role to play in facilitating access to a range of electronic documents and human resources that can assist charities and nonprofits to increase their financial acumen and their ability to engage in earned income activities.

Summit participants emphasized, and we certainly recognize, that a wide range of players from across all sectors need to come together to create an enabling environment (be it through more clarity of CRA regulations or legislative changes, business advisory and support services, better access to capital, and/or the attraction and retention of appropriately skilled HR), to significantly advance the ability of a wide array of charities and nonprofits to enhance their earned income abilities. **We invite those individuals and organizations that are well-placed to play a leadership or contributing role on the earned income and financial literacy front, to write to [Michelle Gauthier](#), outlining the nature of the expertise and resources that they could make available.** This spring, we will seek to convene those who have expressed an interest in this area to pursue next steps that are aligned with the aspirations of Summit participants for better CRA regulations to support social enterprise and social finance, more contact among sectors on social finance, as well more resources and more learning about financial literacy.

## PRIORITY THREE: BETTER UNDERSTANDING OF THE SECTOR AND ITS IMPACT

As discussed during the working group sessions at the Summit, the follow-up to this priority is being undertaken in two streams that are being pursued simultaneously. The first stream is a tactical series of Qs and As that address the most common questions to which the sector must respond publicly and routinely. The second stream is a more complex strategic narrative that will lead to the creation and dissemination of key messages on behalf of the sector.

The first stream is about having ready today the answers to the most frequently asked questions that often detract people from a consideration of our impact. The second stream is about a strategic reframing of the narrative around what charities and nonprofits contribute to Canadians and communities. It is about shifting the frame from “How do we hold the charitable and nonprofit sector accountable for the resources entrusted to it?” to “What is the sector’s impact and how can I/we contribute?”

### *Foundational Qs and As*

The development of sector-wide Qs and As is already underway thanks in part to the efforts of the working group that has been meeting since early December in anticipation of the [Standing Committee on Finance hearings regarding incentives for charitable giving](#). More than 80 colleagues representing a wide variety of sub-sectors and organizations have worked together to prepare and vet a series of Qs and As to respond in a clear and consistent fashion to key questions anticipated in the context of the hearings. To date, Qs and As have been drafted on such topics as [charities’ engagement in public policy, advocacy and political activity](#); [foreign funding of charities and nonprofits](#); [the costs of fundraising](#); [administrative costs](#); and [the sector’s commitment to transparency and accountability](#). Qs and As have also been prepared to clarify some of the sector’s key federal public policy proposals (see Financing Priority) including the [Stretch Tax Credit for Charitable Giving](#) (and its [implementation](#)) and [the transfer of the appeals process for charities to Tax Court](#).

Additional Qs and As on [charity rankings](#), [Charity Focus](#) and [compensation for paid staff](#) round out the list of currently available questions. All the Qs and As are now available in English and a few have already been translated into French. **We would ask that any organization willing to donate the services of their in-house translator or who know of professional translators who offer their services in a highly skilled volunteer capacity, to please contact our lead translator, [Siobhan Moran](#).** Given the amount of material to be translated, even a few hours of assistance in translating and revising the Qs and As would be most welcome.

These Qs and As are offered as foundational ones for the entire charitable and nonprofit sector. Individual organizations and groups of charities or nonprofits can build upon what we trust are consistent and clear cross-cutting responses to tailor additional or more specific answers for their individual organizational or sub-sector needs. These foundational Qs and As

are living documents which will be reviewed at least twice a year and will be easily accessible on the Imagine Canada website and that of partner organizations.

This work is ongoing under the direction of the Summit co-leads for this priority area and **participants with suggestions for additional questions or topics that would be of cross-cutting importance to the sector are invited to submit their ideas to [Stephen Faul](#). You are also invited to propose additions or clarifications to any of the current answers provided, by writing to [Bill Schaper](#).** We will update the Qs and As as new developments occur and as new questions and more precise answers come to light as Summit participants review and test with stakeholders the current answers proposed.

### ***A new foundational narrative***

The second stream is also being facilitated by [Stephen Faul](#), [Marcel Lauzière](#), [Caroline Riseboro](#) and [Lee Rose](#). These lead facilitators are convening a small working group from across sub-sectors and will seek to secure branding and marketing support to assist with this effort. We are pleased that a number of participants have indicated their interest in working with us. The group will use the raw data from Priority 3 at the Summit as a starting point to create message(s) that will be tested and validated by December 2012.

This stream is premised on a sector-wide recognition that surfaced in the first two years of the National Engagement Strategy and that was crystallized at the Summit. The recognition is that as a sector, we have not adequately developed our own narrative, but rather have allowed others to define it for us. This has led to a framing of participation in and with the charitable and nonprofit sector that does not reflect the lived experience of volunteers, staff, donors and those we serve and engage. The creation of a new foundational narrative - a broader understanding of the sector and its impact - is the cornerstone of everything we need to do and will directly inform and influence our success on the other priorities for action.

Awareness of the sector is not the ultimate goal. As per the wise counsel provided by Allan Gregg at the Summit, we need to anchor our efforts in behavioural change, not awareness. We need a reframing of the sector's narrative to fundamentally shift conversations until our message – and the behaviour it seeks to encourage – is the new normal. This is a significant task which requires creating and promoting a new way of viewing the sector, focusing not on ourselves, but on the impact of our work, on the communities we serve and engage, and ultimately on what kind of Canada we want to create together.

While the Summit co-leads for this priority area can be effective facilitators and conveners to get the work done, they will not succeed without many more at the table including the voice of the next generation. **We invite those who have expertise, ideas and/or resources to contribute to this effort, and who share the belief that getting this narrative broadly understood will be critical to our collective success, to please write [here](#) to share their ideas and suggestions.** This input will inform the efforts of the working group and the lead facilitators will communicate with all Summit participants to update you at key points in the effort over the course of the year.

## **PRIORITY FOUR: ENHANCED SUPPORT FOR ORGANIZATIONS TO ENGAGE VOLUNTEERS / EXTERNAL TALENT**

[Volunteer Canada](#) has agreed to play a lead facilitation role in convening colleagues and following up on the very robust conversations at the National Summit pertaining to Priority 4. In reviewing the raw data for the working group sessions for this priority, three streams emerged. The first is the need for a cultural shift and a broadening of how we define and understand volunteering. The second relates to the organizational capacity to engage volunteers. The third, which was heard not only in the working group for this priority area, but also in the plenary discussions among participants and keynote speakers, is the importance of ensuring that the sector's labour force (both paid and unpaid) is truly reflective of the diversity of Canadian society. These three streams align well with current strategic directions and a variety of initiatives at Volunteer Canada and partner organizations across the country.

### ***Cultural shift and changing understanding of volunteering***

The first stream of work requires sector leaders and enablers of volunteer talent to adopt more inclusive language that recognizes volunteering as citizen engagement and civic participation. It also leads us to reframe volunteering to move beyond a narrow concept of service delivery to a spectrum of engagement, which spans individual engagement with a cause to leadership roles in organizations. Volunteering must be recognized as a vehicle for building social capital and social cohesion, and must move from a transactional framework to one that is transformational.

A number of activities are planned for the coming months that will help the sector to further refine the concept of volunteering. Volunteer Canada is currently facilitating dialogue on the changing role of volunteer centres given this emerging context. Reaching out beyond the volunteer centre network to invite input from other stakeholders will be important. **As such, Volunteer Canada will seek input from Summit participants in the months ahead on how we can best enable and strengthen volunteerism in communities across the country.** As well, in April, a roundtable discussion with national organizations will be held to examine the revised [Canadian Code for Volunteer Involvement](#) as a standard of practice aligned with a culture shift in volunteer engagement. **Summit participants should check the Volunteer Canada [blog](#) following the event for updates on outcomes and next steps.**

### ***Organizational capacity to engage volunteers effectively***

As discussed during the working group sessions, building organizational capacity to engage volunteers with changing and growing expectations more effectively may require customized strategies for different groups, types of organizations and communities. Despite this customization, all strategies necessitate an integrated approach to human resources so that volunteers are involved as a critical component of an organization's full talent pool and not marginalized to "helping out" or passive engagement. Technology will be an essential tool to reach out to volunteers more effectively and engage them more actively in one's mission.

Volunteer Canada continues to roll out its [Building the Bridge](#) campaign to provide usable, web-based tools to support effective engagement based on the paradigm of today's volunteers and with a variety of cohorts such as youth, seniors, new Canadians, family volunteers and employer-supported volunteers. The research that led to this campaign was developed through broad engagement with volunteers and charitable and nonprofit organizations across the country. A two-year pilot project on skills-based volunteering will result in a variety of tools being made available to sector organizations this spring. **Summit participants who want more information about the project or the tools are invited to connect with the project lead, [Deborah Pike](#)**

Screening continues to be a huge issue and often a significant challenge for charities and nonprofits who engage volunteers. A [National Dialogue on Screening](#) in November has led to the development of an updated screening handbook, revised in partnership with the Department of Public Safety. Once the handbook is released, likely in April, it will be made available to Summit participants via our updates. Discussions are ongoing with the government on next steps.

### ***Diversity***

Cultural diversity is, of course, a critical lens, but our concept of diversity must also be broader (age, socio-economic, people with disabilities, Aboriginals) to ensure the sector reflects the communities they serve. This applies equally to paid employees and to volunteer engagement. We need to move beyond a perception of volunteering as “charity” for those who can “afford” the time to a frame where everyone can see themselves as a volunteer. A new [digital resource centre](#), which connects new citizens to their communities through volunteering, was recently launched by the Institute for Canadian Citizenship and Volunteer Canada. **Summit participants are invited to visit the link to learn tips for engaging new Canadians as volunteers and to access the volunteer matching tool.**

Achieving diversity across the continuum of talent that the sector engages, from paid through volunteer resources, will require joint efforts between those facilitating the follow-up on Priority 2 (the attraction and retention of paid staff) and Priority 4 (Volunteerism). The [HR Council](#) and Volunteer Canada are invited to consider in the months ahead how best this might be pursued. **Individuals or organizations interested in playing a leadership or contributing role in this effort are invited to contact [Ruth Mackenzie](#).**

While [Ruth Mackenzie](#), [Ilona Dougherty](#) and [Wayne Helgason](#), who led the discussion on this priority area at the National Summit, will continue to play a role in facilitating the next steps of our collective efforts, it will be essential for colleagues with very diverse experiences of engaging volunteers to contribute to and inform the effort. **Summit participants are encouraged to share information and to engage in dialogue on the next steps on this priority area through a recently launched Volunteer Canada blog.** A December 5<sup>th</sup> (International Volunteer Day) blog provides analysis on current issues facing volunteerism in Canada, and further blogging related to these themes will happen throughout the year. Visit [www.volunteercanadaannualreport.ca](http://www.volunteercanadaannualreport.ca) to engage!

**You are also invited to engage in conversations on the GetVolunteering Facebook page.**

Topical issues in volunteerism are planned throughout the year, including a discussion to be led by MP Justin Trudeau on youth engagement on March 1<sup>st</sup>, as a follow-up to a youth engagement dialogue in the Kitchener-Waterloo Region. Throughout the year, community organizations will be invited to participate in other local events such as a roundtable dialogue on the Canadian Code, or related to a variety of tools as they are released throughout the year. Visit [www.volunteer.ca](http://www.volunteer.ca) and the *What's new* section, or sign up for the eVOLution e-newsletter for continued updates.

**OUR THANKS**

Our work over the past three years has been guided by a strong sense of shared responsibility for, and ownership of, both the process and the results. We would like therefore to thank each and every one of you sincerely for your contributions to these Summit outcomes. We look forward to working with you on the next steps identified nationally as well as those that you will identify organizationally, locally, regionally and/or provincially. We welcome ongoing and new contributions to the next phase of the National Engagement Strategy and encourage you to connect with co-host organizations and lead facilitators as we jointly pursue next steps. Together, we are laying the groundwork to ensure that the conditions are ripe for all charities and nonprofits, be they large or small, domestically or internationally focused, operating anywhere in Canada and across a wide range of missions, to have even greater and more sustainable impact.