

# Healthy Attitudes – A Publication of AHP Canada

April 2009

## Regional Director's Report



[Linda Saunders, CFRE](#)  
Regional Director

It seems that Chicken Little is alive and well – and doing a great job in spreading his message of late.

Is the sky really falling? Listen to the news very long, read the pundits, check the status of your RRSP's (no, don't do that – it's too depressing!) and you would think so.

I am not questioning the gravity of the global economic situation or its potential effect on our industry. I am rather reflecting on the impact it has had on the general outlook of so many people. Even those who have yet to be personally affected in any serious way (forgetting about those RRSP's for a moment) are tip-toeing about, waiting for the other shoe to drop. Gloom breeds gloom and more gloom it seems.

A few days ago I had a chat with a colleague from the consulting side of our profession, and he was also commenting on this general gloominess. He made the observation that some of our fellow fundraisers were reluctant to get out and cultivate gifts, preferring the comfort of hunkering behind their desks.

It is true that when AHP surveyed members in the U.S. and Canada in December, that the majority reported that their programs have been negatively affected by the recession. However, it is also true that, "through program adjustments and increased activity, approximately 50% anticipate staying on course and achieving their giving projections."

I am writing this on a Friday evening, having just returned from a meeting of our AHP New Brunswick and Prince Edward Island roundtable in Miramichi. Of course the economy was a topic of discussion. Most of us have not seen any major effect on our programs to date, but all were expressing at least a little apprehension about the future. Then the conversation took a turn, as you can see from the quotes I jotted down from your Maritime colleagues as we talked:

"We have to get out there - the need for our hospitals isn't going away."

"Build awareness – get your message out."

"People will buy hope – we need to communicate strong cases."

"What we are doing is more important than ever."

Granted, these are just short snippets, but they reflect the dedication and optimism which I think is far more typical of health care fundraisers.

There has been a great deal of talk about what is the best course of management for foundations in this era of belt tightening and dismal return on investments. We all struggle with what is the right balance between short-term financial management and maintaining a healthy base for the future. While this is no time to fail to be prudent, cutting too deeply may result in insufficient resources to maintain relationships with our donors through this storm.

I hope you are planning to attend the AHP Canada conference in Montreal, June 25-27. I understand the temptation to cut back on board and staff education in times of constraint, but I have always believed that to be false economy. There could not be a better time for us to gather as professionals and volunteers to learn from the best and to exchange ideas as to how to continue to succeed in the face of current challenges. Conference Chair Paulanne Jushkevich and her committee have developed an outstanding educational program under the theme, "Renegades: Forging New Paths for Fundraising and Public Relations Success." A little renegade spirit could be exactly what we need right now! Be sure to [take a look at the conference program](#) on the AHP Canada Web site.

While you are on the Web site, [review the awards](#) offered this year and plan to submit your entries by **Friday, April 24**. Categories are Culture of Philanthropy, Best Practices, Mentoring and the new AHP Leadership Award.

We are champions of a great cause, and we have great stories to tell. Keep the faith! Hope to see you in Montreal.

Linda Saunders, CFRE  
Regional Director  
AHP Canada

---

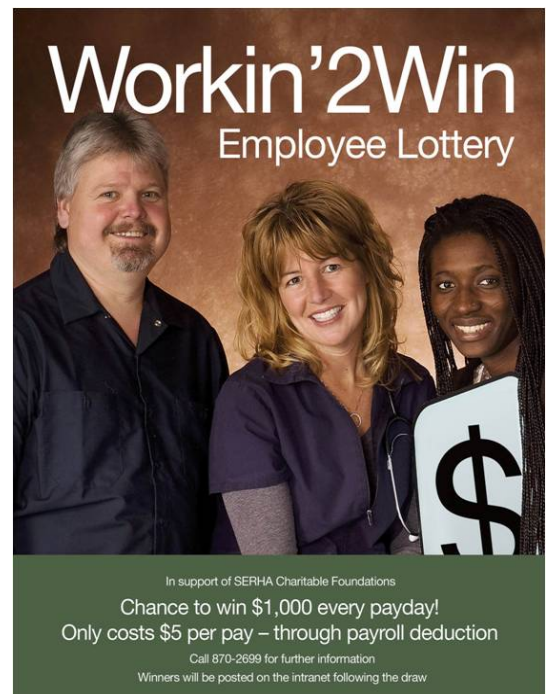
## New Brunswick hospitals enjoy success of employee lotteries

*By Julie Thebeau, CFRE, Senior Development Officer, Regional Health Authority B, Moncton Zone*

Are you looking for an easy way to raise more funds? A number of NB hospital foundations may have the answer for you!

Hospital employee lotteries are very popular in New Brunswick. They are easy to administer, make a significant amount of money for the hospital, and the publicity surrounding an employee lottery has proven to be a great way to increase a foundation's profile among employees! The odds of winning are great - much better than with Lotto 649 - and it's a way for employees to give back. Each foundation has its own way of running its lottery, but in the end the money generated is phenomenal for hospitals both large and small. For instance, with the Friends of The Moncton Hospital Foundation's Workin'2Win employee lottery, five dollars is taken off the participating employee's pay every two weeks. Then on payday, a draw for \$1,000 is made and every few months there are bonus draws held.

Another foundation gives away a trip for two as a bonus prize. Bonus draws not only create a buzz among staff, but they serve as an excellent incentive to increase participation numbers. At The Moncton Hospital, the winners are announced via an "all user" e-mail on the intranet as well as posted at the foundation office. Winners have their picture taken and are given a "big cheque" to post in their office. One key benefit of the lottery is that it has NOT affected the staff campaign payroll deduction program.



**Workin'2Win**  
Employee Lottery

In support of SERHA Charitable Foundations  
Chance to win \$1,000 every payday!  
Only costs \$5 per pay – through payroll deduction  
Call 870-2699 for further information  
Winners will be posted on the intranet following the draw

This is a simple initiative that takes a bit of work to start up but after that it is virtually seamless. Even the smallest of foundations can do this! With only a year and a half under our belt, the Friends has brought in over \$119,000 in profit (1000 participants out of 2500 employees). Foundations based in Saint John, Moncton, Bathurst, Miramichi and Campbellton all run an employee lottery and are very pleased with the results they have achieved

For further information on how you can start an employee lottery in your facility, e-mail [Julie Thebeau](mailto:Julie.Thebeau)



---

## 2009 AHP Canada Awards

Don't miss this opportunity to be recognized for your exceptional skill as a fundraiser! You can nominate your own program or recognize a colleague for his/her extraordinary work. Award winners are recognized nationally at the AHP Canada Regional Conference in Montreal – a terrific boost for your career.

Entries are encouraged from all AHP members in good standing and self-nominations are welcome! Nominations must be a maximum of 2,000 words (total) of narrative covering the specific sections associated with each category. Nominations include a completed nomination form and an application fee of \$65.

Nominations will be accepted until **Friday, April 24, 2009** at midnight.

A national team of judges, comprised of AHP members, will select the winners whose names will be announced at the awards dinner in Montreal on **Saturday, June 27, 2009** in conjunction with the Health Care Public Relations Association (HCPRA) Hygeia Awards.

*Be a renegade – submit more than one nomination form!*

[Learn more](#) - [Download an application form](#)

---

## AHP Canada Regional Conference - register now!

June 25-27, 2009, Montreal, Quebec



Join your fellow AHP health care development professionals for an exciting and educational conference and forge new paths for fundraising and public relations success! If you can travel to just one event this year, make the AHP Canada Regional Conference your priority. Choose from over 25 breakout sessions and the optional executive forum for senior

development professionals. Take advantage of diverse education in lovely Montreal. [Visit the full program online](#) at the AHP Web site.

Return from the conference armed with new tactics and ideas you can use immediately after attending sessions like this:

**Keynote speaker: Julius Grey, Law Professor, McGill University**

No one does renegade like Julius Grey – one of the most famous and respected lawyers of our time and a man of unwavering conviction. A leading civil libertarian and human rights advocate, he has an infectious passion for doing the right thing. This keynote will inspire you and remind you of your passion and mission to forge new paths to health care philanthropy.

This session and many others at the 2009 AHP Canada Regional Conference in Montreal, Quebec are designed to catalyze your passion and cultivate your professional skills. Equip yourself to face the economic tumult ahead. [Register online today](#) or [download a registration form](#).



## A message from Gord Durnam, FAHP

Hi Andrea, Linda and all 528 members of AHP Canada,

I have just finished reading your amazing newsletter expressing the positive attitudes of my favorite professional association. I am so proud of each and every member of AHP Canada. I know that collectively you will be "THE source that all Canadian health care fundraising professionals go to for education and information."

While I am officially retired, I still maintain an active interest in Canadian philanthropy, and I am fortunate enough to have just completed a couple of small contracts with Nipissing University and a hospice campaign.

I also enjoy sharing my views and provide motivation to foundation boards across the country when invited, and I am personally active as a director of the Sandra Schmirler Foundation, serve as a board member of Community Foundations of Canada and chair the new Muskoka Community Foundation.

I am also proud of the AHP endowment fund bearing my name that AHP Canada administers to benefit philanthropic learning in Canada.

Best wishes to each of you and your important health care organizations as you meet the current economic challenges by engaging your board members and donors in creating a partnership for your successful future.

If you plan to visit Muskoka in 2009, don't forget to visit me on the golf course!

*Gord Durnam, FAHP  
AHP Life Member*

---

## 2009 National Charity Law Symposium

### Thursday, May 7, 2009

*Co-Chairs:*

*Terrance S. Carter, Carters Professional Corporation, Orangeville*

*Linda J. Godel, Torkin Manes Cohen Arbus LLP, Toronto*

This joint program of the Canadian Bar Association and the Ontario Bar Association Charity and Not-For-Profit Law Sections will bring together leading experts from across Canada to speak about the latest developments in this rapidly changing area, including:

- The Canada Revenue Agency's new fundraising policy and its forthcoming policies on Foreign Activities
- The meaning of a gift from a tax perspective

For more information regarding this event, please contact Terrance S. Carter, B.A., LL.B., Trade-mark Agent via [e-mail](#) or phone, 1-877-942-0001.

---

## Philanthropy quotes of the month

*They who give have all the things. They who withhold have nothing.*

Hindu Proverb

*If you think of life as like a big pie, you can try to hold the whole pie and kill yourself trying to keep it, or you can slice it up and give some to the people around you, and you still have plenty left for yourself.*

Jay Leno

*Don't judge each day by the harvest you reap, but by the seeds you plant.*

Robert Louis Stevenson

---

## Planned Giving: the truth is in the numbers

*By Saskia Agnes, CFRE*

A healthy planned giving program can be a blessing, particularly in turbulent times. However, the numbers associated with planned giving can be a tad tricky and sometimes downright elusive. Deferred gifts, expectancies, estate valuations, even insurance policies might seem intentionally vague when compared to annual, major and leadership gift program revenues.

When sitting at the table with your board of directors, your planned giving program might give the impression of pennies from heaven that drop without planning. A prudent executive director may consider reporting on projected planned gift figures akin to a 649 ticket – nice if it happens, but best not to count on it.

An established program is actually routine. The trick is to establish sound reporting methods as you develop your program. While the program is in development or if it is in a rapid building phase, you might find the figures take a couple of years to stabilize. When sustained, they are reliable and have been known to assist an overall fundraising program through the peaks and valleys of their collegiate gift programs.

In planned giving reporting, there are two types of values, and three key reports that are used every day to provide reliable figures for projected program values. Determining values for deferred or expectancy gifts and establishing a realized estate gift will help you provide clean numbers to your board year in and year out. To help you report these

numbers, you will want to use a Pooled Expectancy Report, an Estate Pipeline Report, and a Planned Giving Donor Report. The names might change, but the meat of these reports will be the same.

Establishing an Average Expectancy Value helps you assess the pooled value of expectancy gifts that will flow to your organization after the donor dies. Your program will be accountable for increasing the value of this pool each and every year. Each year some of these gifts will be realized through estate gifts.

You will find an Estate Pipeline Report useful in estate administration. This report enables you to project annual estate cash flow with fair accuracy, meaning the amount of funds expected to be received through estates in this year, next fiscal year, and so on.

Finally, the Planned Giving Donor Report helps your account management. Planned giving does not always fit seamlessly into a fiscal fundraising year, with measurements of pledged or receipted dollars raised, the number of accounts in identification, cultivation or solicitation. Each year donors request information or wish to discuss a planned gift. However, you may not hear from them again for several years. Yet when you do, they expect you to remember the details of your conversation including sometimes complex family relationships.

Establishing an account management tool allows you to follow-up and track information without limiting yourself to an action report. Each year, you ensure that you have the required number of accounts in identification, cultivation and solicitation to meet your fundraising goals. This report also helps establish realistic program activity and revenue goals as well.

The administration required in establishing standard planned giving program reports saves you enormous amounts of time and stress throughout the year. When you have reliable program reporting, planned giving programs shift from the unknown, fingers' crossed category, to the reliable revenue category. As an executive, you are then able to assign revenue and expenditures against your planned giving program and apply activity goals with confidence.

[Saskia Ages, CFRE](#)

Executive Director

[Victoria Hospice & Palliative Care Foundation](#)

Victoria BC 250.952.5726

Note: Saskia Ages, CFRE will be presenting "Planned Giving, the truth is in the numbers" at the 16th Annual National CAGP Conference in Niagara Falls, Ontario, April 22-24, 2009.

---

## AHP Canada letter-writing campaign

AHP Canada, in conjunction with Canadian Fundraising and Philanthropy (CF&P) encourage members to write their members of Parliament asking them to adopt measures in the next budget allowing Canadian charities to access greater private sector support. Two of these measures capitalize on the success of the complete elimination of capital gains tax on gifts of listed securities in the 2006 budget. The first two proposals are that gifts of private company shares and real estate would also be exempt from capital gains taxes, as is the case in the United States. The measures were originally proposed for inclusion in January's budget by Donald K. Johnson, the noted philanthropist, non-profit board leader and investment advisor. Mr. Johnson, who was instrumental urging in the government to eliminate the capital gains tax on listed securities, continues to press for these changes and recommends that people participate by personalizing and sending one of the sample letters below

### [Suggested copy for all MPs](#)

Canada's not-for-profit sector is facing enormous financial challenges due to the dramatic drop in stock prices during the past few months and the decline in the value of endowment funds. As you know, many of Canada's universities, hospitals, social service agencies, arts and cultural organizations and community foundations were recommending that the government introduce three measures in the budget to stimulate charitable giving. These measures would help our charities access greater private sector support from previously untapped sources of donations.

Two of these measures capitalize on the success of the complete elimination of capital gains tax on gifts of listed securities in the 2006 budget. The first two proposals are that gifts of private company shares and real estate would also be exempt from capital gains taxes, as is the case in the United States. Any concern about potential valuation abuse can be addressed by ensuring that the donor would not receive a tax receipt until the charity has sold the private company shares or the real estate and received the cash proceeds from the sale.

Unfortunately, these proposals were not implemented in the recent budget due to the prime focus on fiscal stimulus and the very short time for the budget preparation. They should, however, be included in the next budget. The Conservatives, the Liberals, the NDP and the Bloc Québécois all supported the elimination of the capital gains tax on gifts of listed securities, which was implemented in the 2006 budget. Logically, all four parties should support the elimination of capital gains tax on gifts of private company shares and real estate.

#### For Conservative MPs:

As our local Member of Parliament, you could help ensure that these measures are included in the next budget by communicating your support to Prime Minister Stephen Harper and Finance Minister Jim Flaherty, as well as other influential cabinet members. All not-for-profit organizations in our riding would be very grateful for your support.

#### For Liberal MPs:

As our local Member of Parliament, you could help ensure these measures are included in the next budget by communicating your support to Michael Ignatieff, Scott Brison and John McCallum. All not-for-profit organizations in our riding would be very grateful for your support.

#### For NDP MPs:

As our local Member of Parliament, you could help ensure these measures are in the next budget by communicating your support to Jack Layton, Thomas Mulcair and Judy Wasylycia-Leis. All not-for-profit organizations in our riding would be very grateful for your support.

#### For Bloc Québécois MPs:

As our local Member of Parliament, you could help ensure these measures are included in the next budget by communicating your support to Gilles Duceppe and Jean-Yves Laforest. All not-for-profit organizations in our riding would be very grateful for your support.

Yours truly,  
Name  
Position, Organization

■ [Find your MP and other party officials](#)

[Donald K. Johnson](#)  
Senior Advisor

---

## Wanted: Fresh Content for the AHP RIC Library!



The AHP Resource Information Center's "Most Wanted" material:

We are currently looking for the following sample documents to expand the AHP RIC On-Line Library:

- 1: Planned Giving Job Descriptions (any position)
- 2: General Foundation Brochures
- 3: Organizational Charts

Do you have a good example of one of these "Most Wanted" documents?

If so, please send it via [e-mail attachment](#), or mail a hardcopy or CD to:

AHP 313 Park Avenue, Suite 400, Falls Church, VA 22046

---

### Editor's note

This publication will be what "you" want it to be! In order for that to happen, we need your input, your sage advice and even your criticism. Our aim is to ensure the information is topical, interesting, thought-provoking and value added. But we need your help.

Here is your chance! We are especially seeking stories, ideas, photographs or even short tips on philanthropic ideas that have worked for you and your organization.

Have you found a wonderful way to turn your special events into an amazing way to garner long-term supporters? Do you have important ideas on recruiting major gifts? On involving board members? On creating awareness of your organization? How has gaining your certification (CFRE, FAHP) helped you in your work? Tell us about your e-philanthropy program, about your direct mail program, or about your annual campaign. What is working for you?

In order to make this newsletter the best it can be--more submissions from AHP members from throughout Canada are needed.

Our deadline for copy for upcoming issues of Health Attitudes is:  
June 1st – (beginning of June as a teaser for the national conference)  
October-10th  
December-10th

Wishing you success in your philanthropic endeavours! And most importantly...a balanced life with time for your families.

[Andrea Page](#)

*AHP Canada RIC/Communications Chair*