

Department of Philanthropy

**THE MISSION & WORK OF
THE DEPARTMENT OF PHILANTHROPY**

Report to General Synod 2010

Mission & Mandate

To create a more professional and productive resource development program that will enable the Church and its people to fulfill God's mission.

To enhance the coordination of fundraising activities within the Anglican Church of Canada including General Synod, its national partners, dioceses and parishes.

Background

The Department of Philanthropy was created by a resolution of the Council of General Synod in March 2007 based on recommendations from the Somers Report of 2006 which was commissioned by the Financial Management and Development Committee of General Synod. The report urged a number of innovations and efficiencies that should be implemented by national church partners working in closer relationship with the new department.

In the fall of 2008 a full-time Executive Director of Philanthropy was hired. Since that time, the Department of Philanthropy has been working to refine the meaning and methods of giving for the Anglican Church of Canada. This report highlights some of the key areas of the Department's responsibilities and the ways in which it is working to achieve its goals and fulfill its mandate.

THE FOUR PILLARS OF PHILANTHROPY

**Annual Giving
Major Gifts
Planned Giving
Corporations & Foundations**

PILLAR 1: ANNUAL GIVING**The Anglican Appeal****2010 Goal: \$580,000**

The Anglican Appeal, established in 1992, is the annual fund of the Anglican Church of Canada. In recent years it has focused on supporting the mission and ministry of the Church in Canada's north and overseas. The standard range of gifts is between \$1 and \$15,000, with the average annual gift in the \$50 to \$55 range.

To increase support of operations through the Appeal for 2010 we have devised a new calendar for direct mail, advertising and other outreach efforts. Because of the timing of this report, it has not been possible to include figures for the Anglican Appeal for the first quarter of 2010. We look forward to bringing year-to-date figures (through the end of March) and other data of possible interest as part of our presentation to General Synod in June.

Diocesan Annual Appeal Partnerships**2010 Goal: \$40,000**

Related to the Diocesan Services work of the Department of Philanthropy, but a subset of our annual giving program, has been the development of a pilot project to help individual dioceses establish annual appeals of their own.

By partnering with General Synod and the Anglican Appeal, individual dioceses are encouraged to establish annual appeals with assistance from the Department of Philanthropy. This includes receipting and acknowledging as well as the development of donor communications. Both the costs and the income from this annual appeal are shared among the participants, and there is a generous parish rebate program that serves as a further incentive to participate. It is hoped this initiative will help dioceses to build capacity for their stewardship and fundraising ministries, with an annual appeal as part of their best practices.

A pilot project annual appeal such as this began in the Diocese of Ontario in the summer of 2009 and will be launched at the end of March 2010. The Department will bring a report on the results of this partnership to General Synod in June and will invite delegates to consider how such an initiative might work in their own dioceses.

Collaborations with National Partners

The Department of Philanthropy is making strides towards enhancing and coordinating fundraising activities between the office of General Synod and national partners. Most recently, the Department has been collaborating with the Anglican Foundation of Canada on its membership development and communications plan, and we have also established a

partnership with the *Anglican Journal* on an exchange of best practices in order to enhance donor communications and to expand the annual direct mail appeal. While these joint projects do not have specific financial goals attached to them, we anticipate increased fundraising revenues to the Foundation and the Journal as a result of our collaborative work. We look forward to bringing an update on these projects to General Synod in June.

The Gift Guide**2010 Goal: \$250,000**

The new gift guide, *Acts of Faith*, is an important innovation in the Department of Philanthropy's ministry. It exemplifies our efforts to sow the seeds of a culture of philanthropy across the Church. It is intended as a joyful, hope-filled invitation to be part of God's mission for the Church in a variety of appropriate ways. The guide illustrates how even in the midst of financial challenges we can find hope by choosing to embrace our difficulties as opportunities.

As with most innovations, we expect that it will take time for *Acts of Faith* to become part of the life of the Church. We are hopeful that it will build steadily over time, growing into a significant and dependable annual income stream that will enable and empower our mission work well into the future. A secondary benefit of the gift guide is that it brings all General Synod departments and partners into one brochure for the first time and truly tells the story of the life and work of the Church in its full scope and breadth, supported and facilitated by the Department of Philanthropy.

With the help and financial support of General Synod delegates, we hope to meet or exceed our projections for *Acts of Faith*. We look forward to sharing the results of the launch of the gift guide at General Synod in June.

Capacity Building

Key to all of our philanthropic work, but particularly relevant to the annual giving program, is the need to adopt a software solution that will facilitate the realization of our mission. A national organization of our size must be able to harness technology to ensure excellence in donor stewardship and accountability.

Adopting the most effective software could have far-reaching benefits that would extend to other departments, our national partners, dioceses and parishes, helping to increase organizational efficiencies throughout our fundraising ministries, particularly with respect to annual giving. A needs assessment is currently in development with the hope that a recommendation can be made by the summer of 2010. Additionally, partnerships with dioceses having similar needs and goals are also being considered.

PILLAR II – MAJOR GIFTS**2010 Goal: \$200,000**

The greatest potential source for increasing development revenue to the Anglican Church of Canada in the long run is through major gifts. This particular pillar of philanthropy requires a significant investment of time, and in pursuing this path the Church must be patiently supportive of building a firm operational foundation for major gifts.

The development of a major gifts program has been one of the Department's highest priorities. We have had to proceed in a rather untraditional way, lacking the resources to build a professional major gifts office. We have identified a number of highly committed volunteers with extensive fundraising experience. This group now constitutes the Major Gifts Committee of the Department of Philanthropy. They represent most of the major regions across Canada and focus on building relationships with prospective donors in their dioceses. Our regional gift planning consultants also play a critical role in our major gifts efforts.

Based on the input and feedback of our Major Gifts Committee members, we have honed and refined our approach for 2010 in order to capitalize on momentum from the Vision 2019 planning process and to facilitate donors' understanding of and excitement about the vision. The Committee has recommended a series of regionally specific and strategic events — luncheons and dinners — hosted by some of our major supporters. These gatherings will deepen our ongoing relationship with donors as well as allowing the Primate another important venue in which to communicate a clear and compelling vision for the Church.

In addition to the cultivation events, we have also identified prospective major gifts donors for three key financial development projects: Indigenous Ministries, The Anglican Military Ordinariate and the *Anglican Journal*. We look forward to bringing an update on all of these projects to General Synod in June.

PILLAR III – GIFT PLANNING

Gift Planning continues to be an essential part of the life and work of the Anglican Church of Canada. Parishes and dioceses, along with our national partners, are becoming increasingly aware of the remarkable opportunities gift planning offers for the funding of vital ministries and programs.

Working closely with the Ven. John Robertson, National Gift Planning Officer, is a team of highly qualified regional gift planning consultants. General Synod in the past year has funded a portion of the consulting fees for six positions in partnership with dioceses: Eastern Newfoundland and Labrador, Nova Scotia and P.E.I., Ottawa, Huron, Edmonton and Kootenay. Because of recent personnel changes and new partnership agreements, we have added the Diocese of Niagara and are in the process of selecting a consultant for the Diocese of Rupert's

Land. We will be finalizing arrangements shortly for a joint appointment to serve the three dioceses of the civil province of Saskatchewan: Saskatchewan, Saskatoon and Qu'Appelle. We are also in the process of naming a successor to our consultant in Huron who has returned to full-time parish ministry.

Charitable Gift Annuities & other forms of Gift Planning 2010 Goal: \$100,000

Gifts of listed securities and charitable gift annuities appear to be increasing once again, as the economic recovery gains momentum. Enquiries about annuities have increased substantially, as have discussions centering around bequests, gifts of life insurance and listed securities. The vast majority of such gifts are designated for the donor's parish, although some dioceses and our national partners benefit from this ministry as well.

Bequests

We are encouraging Canadian Anglicans to consider establishing bequests for the work of God through the Church. We were the grateful beneficiaries of three bequests received in 2009, a direct result of the Ven. John Robertson's ongoing ministry. The total received to date for General Synod from these bequests is \$3,422,169. Our advertisements in the *Anglican Journal* continue to draw considerable, favourable attention, with particular appreciation expressed recently by the senior leadership of the Anglican Military Ordinariate.

Legacy Gifts Identification

The Legacy Gifts Identification Initiative (formerly known as the Bequest Identification Initiative) is part of the Department's broader goal to contribute to a theology and culture of philanthropy across the Church — one that emphasizes abundance over scarcity and seeks to inspire people to give as a fulfillment of their Christian vocation. This initiative was initially presented to the House of Bishops in 2009 and after a successful pilot project with the Diocese of Toronto last fall, a nationwide mailing will be launched in April to coincide with *Leave-a-Legacy Month* in May. The Department has learned that this project is one of the best ways for the Church to move away from a culture of scarcity towards one of abundance. It is truly a good news story for parishes and dioceses.

Philanthropy has also discovered that the legacy mailing has a stimulating effect on the gift planning ministry in a diocese, inspiring people to put their faith into action and to think more intentionally about arranging for a bequest or legacy gift to their church. Following the nationwide mailing, our Regional Gift Planning consultants will be well positioned to talk to a number of prospective donors in their areas. It is also hoped that as parishes and dioceses

become aware of the full measure of these gift declarations it will help them enhance their own ministry and stewardship plans.

While it is difficult to establish a precise goal for the initiative, the pilot project in the Diocese of Toronto identified a little more than \$3 million in committed and prospective bequests. The Department of Philanthropy will bring a report to General Synod on the results of the program to date.

PILLAR IV: CORPORATIONS & FOUNDATIONS

The Department of Philanthropy has begun the process of identifying and cultivating potential corporate and foundation donors. Historically, there has been very little emphasis in the Office of General Synod on seeking funding from foundations and corporations for the ministry of the Church. While some of our partners have limited experience with this and are still growing in their level of comfort with it, there is enormous untapped potential for the Church to obtain more corporate and foundation support for our work.

For 2010 we have set a modest goal of \$120,000 in this area for two specific projects, and we have also begun some key capacity building and research work in order to develop this area for 2011 and beyond. We hope that these measureable steps will help us engage a number of committed corporate sponsors while giving us time to make the organizational and cultural shift necessary for our partners to feel more confident in this less familiar area of philanthropic work.

General Synod

2010 Goal: \$60,000

The Department of Philanthropy is working with Anglican Video and the General Secretary's Office to develop a corporate sponsorship prospectus that will present the General Synod gathering as a significant and important sponsorship opportunity for corporations having natural and appropriate connections to the Anglican Church of Canada. General Synod provides potential sponsors with a variety of opportunities, such as the ability to sponsor live web casting. We look forward to meeting this objective and to acknowledging all of our corporate sponsors at General Synod in June.

The Gift Guide

2010 Goal: \$60,000

Due to the large scale distribution of *Acts of Faith* and the need to capitalize on the momentum created by this important annual giving opportunity, it is essential to create a second wave of our marketing and communications efforts in the fall of 2010. This will likely include a second

(albeit smaller) print run as well as a vibrant and interactive online presence for the gift guide by November 2010.

Research & Development (Capacity Building)

Of particular interest to our research and development work will be community and private foundations whose missions resonate with some of the social justice and social service programs run by our parishes, dioceses and national partners. Some of the programs of the Anglican Church of Canada are, indeed, eligible for such funding.

Following the recommendation of the Somers Report, the Department of Philanthropy has recently added a research consultant to its team. In the coming months, this colleague will continue to identify corporate and foundation prospects and conduct the research necessary to establish the match between institutional grant makers and the Church, its partners and dioceses and their parishes.

This area is still largely under development and while we would expect it to be a substantial source of revenue, it will not be in the near-term, and so we refrain from articulating any specific financial goal.

THE NATIONWIDE FUNDRAISING INITIATIVE

As part of its 2008 report to the Council of General Synod entitled *Achieving Financial Equilibrium*, the Department of Philanthropy included amongst its objectives the design and implementation of a major nationwide fundraising initiative. Since late 2008 and during much of 2009, work has been ongoing to establish a sound rationale and clear methodology for such an initiative.

One of the key questions before the team assigned to the development initiative is whether or not it would be similar to the last national campaign, Anglicans in Mission (AIM) undertaken in the mid 1980s. This very successful effort was largely top-down, with participating dioceses supporting a focused case that benefited the ministries and programs of General Synod with a sizable portion of the revenue going to dioceses for their various programs.

As the Department of Philanthropy consulted with dioceses, and as we studied the AIM model in greater detail, our perspective broadened and deepened. Other approaches were given consideration, and new thinking was stimulated, in part, by the fact that a number of dioceses and parishes were preparing to launch their own campaigns. The need for a more consultative and coordinated model became apparent.

The Diocese of Ottawa emerged as an exemplary test case in the Department's planning. With a widely supported strategic plan in place and an able group of clerical and volunteer leadership

on board, the Diocese was moving forward with plans to launch an ambitious fundraising program. As conversations with the Diocese advanced, the team gradually developed a model whereby the Department of Philanthropy could assist in the development of their case for support and in helping to plan their feasibility study, as well as in building their fundraising infrastructure. In return, they would coordinate their efforts with ours in a way that would maximize efficiencies of diocesan and national staff work, and they would build into their case for support selected ministries and programs of General Synod and its partners, thereby integrating the nationwide initiative into their own campaign.

In our conversations with other dioceses and parishes across the country, we have been applying and adapting our experience with the Diocese of Ottawa. As a result, a model quite different than that of AIM has emerged. We are currently pursuing the possibility of making the nationwide initiative a diocesan-centered and diocesan-driven campaign. This would, in effect, transform the nationwide undertaking from being a top-down, nationally oriented effort to a grassroots diocesan/parish-oriented campaign. A single nationwide effort with participating dioceses is becoming a series of diocesan campaigns enabled, supported and managed by the Department of Philanthropy in such a way as to maximize support for parish, diocesan and General Synod ministries and programs including those of our national partners.

There are many advantages to this partnership model, some of which are as follows:

- It prioritizes the needs of dioceses and parishes in a way that assures their ownership and active participation.
- It allows for much greater staff and resource efficiencies in planning and launching fully collaborative fundraising programmes.
- It should allow for enhancing resource development infrastructures at parish and diocesan levels.
- It could well lead to raising substantially more money than a nationally directed initiative.
- It helps to establish an ongoing partnership model for the long-term, quite possibly leading to more sustainable revenue streams for the mission work of the Anglican Church of Canada.

The Department of Philanthropy looks forward to providing a further update on developments related to the nationwide fundraising initiative to General Synod in June.

DIOCESAN SERVICES

The Department of Philanthropy continues to expand its professional services to dioceses and parishes. For nearly five years, initially as the *Letting Down the Nets* educational initiative, and now as part of the Department's Diocesan Support Services, assistance is being provided by the Office of General Synod to parishes and dioceses across the country. Originally designed for Stewardship Education, these essential support services have now been expanded to cover

Strategic Planning, Annual Appeals, Major Gift Programs, and other financial development efforts, including enhancing established gift planning programs and capital campaigns.

A major setback to this ministry occurred in January 5th of this year with the sudden and untimely passing of Canon Geoff Jackson, Senior Development Officer with the Department of Philanthropy, who was both a pioneer and a champion for this important work. Thanks in large measure to Canon Jackson's dedication, at the time of his death, more than 50% of dioceses nationwide were actively engaged in some kind of partnership with the Department.

Members of the Department of Philanthropy, including our dedicated team of Regional Gift Planners, have endeavoured to carry on these services. The Department sees as essential to its work the benefits of collaboration and cooperation between dioceses and the office of General Synod and enhancing the Church's ability to share knowledge and best practices from one Diocese to another.

GOVERNANCE AND THE DEPARTMENT OF PHILANTHROPY

Since its inception, the Department of Philanthropy has been governed by the Development Subcommittee of the Financial Management Development Committee. Conversations within the Subcommittee and the FMDC as a whole have led to a proposal to be considered by General Synod that would divide the current committee, allowing for the formation of a free-standing Philanthropy Committee. The new committee would oversee the ministries described in this report and shepherd the further development of the Department.

For more information on the Philanthropy Committee and its rationale, please refer to the report of the Financial Management Development Committee and the resolutions it proposes for General Synod consideration.

PHILANTHROPY TEAM MEMBERS

National Office

Dr. Holland Hendrix, Executive Director of the Department of Philanthropy

Holland joined the staff at the Anglican Church of Canada in the fall of 2008. He is a baccalaureate graduate of Columbia College, Columbia University and holds the M.Div. and S.T.M. degrees from Union Theological Seminary in New York City. He is a doctoral graduate of Harvard Divinity School.

Holland served as President of Union Theological Seminary from 1991-1998 where he led the institution through a major renewal process. He has also served as president and CEO of the Echoing Green Foundation in New York and, more recently, was Chief Advancement Officer at Hampshire College in Massachusetts. Holland is responsible for and provides oversight to:

- The Department of Philanthropy
- The Anglican Appeal
- Diocesan Services across the country
- Planned Giving Programme
- Major Gifts Programme
- The Nationwide Fundraising Initiative
- Building a Corporations and Foundations Programme

The Ven. John M. Robertson, National Gift Planning Officer (Kingston)

John has served the Anglican Church of Canada as National Gift Planning Officer since 1994. John is a graduate of Rutgers University with a degree in Economics. John earned a Bachelor of Sacred Theology Degree with Honours at Trinity College, University of Toronto, and served as a parish priest for 29 years in the dioceses of New Jersey, Caledonia and New Westminster before taking up his national post sixteen years ago. John's areas of responsibility within the department include, but are not limited to:

- Development of the Major Gifts Programme
- Lead consultant for Diocesan Services
- Management and oversight to the network of Regional Gift Planners

Shannon Cottrell, Anglican Appeal & Donor Relations Coordinator

Shannon has worked for the Anglican Church of Canada in the area of financial development since 2002. Prior to serving as the Anglican Appeal & Donor Relations Coordinator in the Church's Department of Philanthropy, Shannon served as Donor Relations Coordinator for four years, and Donations Clerk for Anglican Appeal for three years. Shannon graduated with honours from the University of Waterloo with a Bachelor of Arts degree in History and Drama.

An active member of both the Association of Fundraising Professionals and the Canadian Association of Gift Planners, Shannon successfully completed the Association of Fundraising Professionals' *Essentials of Fundraising Program* in 2009. It is her intention to write the exam for CFRE certification within the next two years. Shannon's area of responsibility within the department includes, but is not limited to:

- Overseeing Anglican Appeal, General Synod's annual direct mail campaign that supports mission work and ministry in Canada's northern dioceses and with church partners overseas in the Anglican Communion
- Providing donor relations to Anglican Appeal and General Synod donors
- Assisting with the development of the Major Gifts Programme

Alethea Mannooch, Anglican Appeal Donations Clerk

Alethea came to Canada in 1966 and worked for Royal Insurance until 1974. Since 1974, she has served the Anglican Church of Canada, supporting the Director and Accounting Department of the Anglican Book Centre for 31 years. She has been working for the Anglican Appeal as the Donations Clerk since 2005. Her responsibilities include:

- Open mail batch cheques for individual donors/churches and process for banking
- Process donations that are received
- Maintain Anglican Appeal Donor Database

Michelle Frost, Executive Assistant to the Executive Director of Philanthropy

Michelle joined the Philanthropy Department in October 2009. She has worked for many years in the not-for-profit sector for organizations such as: Girl Guides of Canada (National Office), Morningstar Christian Fellowship (a large Baptist church in East Scarborough) and SIM Canada (a mission organization geared to Africa and South America). Michelle enjoys providing administrative support and her responsibilities include:

- Administrative support to the Executive Director of the Department of Philanthropy
- Administrative support to the Department of Philanthropy

Consultants**Michelle Hauser, Special Initiatives Consultant (Napanee)**

Formerly the Stewardship and Congregational Development Officer for the Diocese of Ontario, Michelle joined the Department of Philanthropy in September 2009 on a consulting basis. Michelle has worked in board and donor relations at the Art Gallery of Ontario, and managed constituent communications for the Hon. Peter Milliken, M.P. for Kingston and the Islands. Michelle provides project management and administrative oversight to the following areas:

- *Acts of Faith*, the new gift guide for the Anglican Church of Canada
- The Legacy Gifts Identification initiative
- Diocesan Services, particularly annual appeals
- Inter-departmental support for specific fund development initiatives

Paul Clur, Research and Grant-Writing Consultant (Kingston)

Paul was raised in West Vancouver, British Columbia. With a master's degree in political science, Paul brings experience from the university environment to his position as Research and Grant-writing Consultant for the Department of Philanthropy. He is working closely with parishes, dioceses, General Synod departments and our national partners to identify corporate and/or foundation grant opportunities and to prepare applications for funding. Paul will be serving at the Department's information table at the 2010 meeting of General Synod in Halifax, so if you want to learn more, stop by the table and say "hello".

Regional Gift Planners/Consultants

David Connell – Diocese of Edmonton

After a lengthy career in the oil industry and a much shorter one with an investment firm, David joined the Synod Office staff in 2003 and became the Planned Giving Officer in 2005. In his role, David has played a part in diocesan stewardship initiatives. His responsibilities include:

- Planned giving presentations in parishes
- Stewardship homilies and workshops

Glen J. Mitchell, CFRE, EPC

Glen has served as the Director of Gift Planning for the Diocese of New Westminster since 2004. He is a graduate of the BC Open University with a Bachelor of Arts degree in political science and economics. He intends to graduate in May 2010 with a Master of Arts in Theological Studies degree from the Vancouver School of Theology.

Previously, Glen worked for nine years as a self-employed resource development consultant to the non-profit sector after completing sixteen years in a leadership role with BC's educational broadcaster, the Knowledge Network, in community development, communications and resource development. Glen's responsibility at the diocese includes but is not limited to:

- Gift Development Consultant (Major and Planned Gifts)
- Stewardship Consultant
- Camp Artaban Society (director and chairperson, Fundraising Committee)
- Mission to Seafarers Society (chairperson and vice-president)

James F. Newman, CMA

Jim is the Stewardship Consultant in the Anglican Diocese of Niagara. His professional background includes careers in computer science, accounting and full-time post-secondary teaching. He has extensive experience as a business and parish consultant, parish warden and chair of stewardship and capital campaigns. He has worked with more than 60 parishes and his areas of expertise include:

- Year-round stewardship programmes and narrative budgets
- Gift planning initiatives and capital campaigns
- Parish brochures and marketing materials
- Workshop developer and seminar leader
- Sunday morning preaching on stewardship

Charles L. O'Neil, EPC

Charles is a certified Elder Planning Counsellor (EPC) and serves as Director of Gift Planning for the QEII Health Sciences Centre Foundation in Halifax NS, the quaternary health care facility for

Atlantic Canada. He is a gift planning advisor with over 21 years experience in the field. Working closely with General Synod, he established a gift planning program for the Diocese of Nova Scotia & Prince Edward Island in 1988 and continues to provide part time consulting services to the diocesan Planned Giving Committee.

Charles has been a member of the Canadian Association of Gift Planners since 1996, is currently a member of the national board of directors and a past chair of the Nova Scotia CAGP Round Table. Charles is a member of the editorial board of the newsletter Gift Planning in Canada, and also is a member of the Halifax Estate Planning Council. In 2009 he completed the CAGP Advanced Gift Planning Course.

The diocesan Planned Giving Committee responsibilities include:

- Production of gift marketing materials for parishes
- Assisting parishes with the organization of estate planning seminars
- Promotion among Anglicans of gift planning to all levels of the Church
- Provision of stewardship education, as it pertains to accumulated assets, to clergy and the laity
- Assisting parishes with the establishment of endowment funds

Kevin Smith – Diocese of Eastern Newfoundland and Labrador

Kevin has been the Gift Planning Consultant in Newfoundland and Labrador for the last ten years with primary responsibility for the Diocese of Eastern Newfoundland and Labrador. Prior to this, he was the Director of Alumni Affairs at Memorial University of Newfoundland for fifteen years.

Kevin takes great delight in passing on to parishes and parishioners the benefits and positive results of gift planning to the Church. His ministry is just starting to pay dividends for the Church — a fact for which he is eternally grateful.

The Rev. Rob Waller – Vancouver

Rob has served the Anglican Church of Canada as a Special Project Consultant since 2002. He is a graduate of Emmanuel & St. Chad College, Saskatoon and has served as a parish priest in the Diocese of Kootenay and as the Stewardship and Financial Development Officer for the Diocese of New Westminster before establishing a consulting firm in 1992. Rob has served on the national FMD Committee as an advisor. Rob's areas of responsibility are as follows:

- Working with pilot project dioceses conducting studies and implementing stewardship education and/or financial development planning
- Consultant for Diocesan Services
- Developing and managing major gift initiatives