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The definitive [4] times per year source of philanthropic trends analysis in Canada

The Future of Fundraising

Dear Friends and Colleagues,

I am writing this on the eve of my retirement, a time of both reflection and anticipation.

My twenty three years at KCI (twenty as Chair of the Philanthropic Trends National Advisory Board) have been a sincere privilege. I have been a first-hand witness to the growth and sophistication of our fundraising profession and the volunteer Boards that oversee our work.

I have been equally challenged and motivated by the complexity of the issues we have identified and addressed in our *Philanthropic Trends Quarterly* editions over the years, and inspired by the commentary they have evoked. And, I have come to understand how critical it is for KCI to maintain our role as “thought leader” and advocate for the sector. My extraordinarily talented colleague, Nicole Nakoneshny, who has been Editor of *Philanthropic Trends Quarterly* since 2009, will continue to lead in this regard.

This Spring 2018 *Philanthropic Trends Quarterly* edition brings an opportunity for our National Advisory Board members to be featured prominently as they speak about “The Future of Fundraising.” Always thoughtful and forthright in their advice, they talk about what they are seeing and watching out for, everything from the shift



to digital fundraising, the need for charities to invest during this time of immense change and the ongoing challenges of finding and keeping fundraising talent.

I have always said that to do what you love, and to love what you do, is the greatest gift in life. I am fortunate because I have been able to do what I love every day, with the special support of my extraordinarily talented KCI colleagues. This has never been just a “job” for me – never just a role to play. It has always meant more than that, and it has always given me more than that.

May you be similarly blessed in your work, and may you continue to find inspiration in the pages of KCI’s *Philanthropic Trends Quarterly*. I look forward to continuing to be amazed by the impact you will have, together, on making our collective dream of better communities and improved lives a reality.

Warmly,

Marnie Spears
President and CEO

KCI >>

FORWARD THINKING



Who, even five years ago, would have predicted that self-driving cars and robots in the surgical suite would be anything more than the stuff of science fiction comics?

Going back even further, who'd have ever thought anything on the '60's cult classic television show *The Twilight Zone* would ever become reality: 3D printing or global warming, anyone? Or that today's longest-running television series *The Simpsons* would have predicted the future in some stunning and uncanny ways: the election of U.S. President Donald Trump, the invention of the smartwatch, and Disney's takeover of 21st Century Fox, to name just a few.

Who knows how these screenwriters have managed to foresee the future. Could be serendipity, lucky guesses... or maybe they really are just that good at

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identifying trends and understanding how they will play out.

While predicting the future is no easy feat, anticipating what successful fundraising will look like in the years to come and developing the necessary skills and tools to adapt are absolutely essential during these times of profound change. “Charities must think ahead to be sure that they

are ready for what the future holds. It’s a core competence that every organization needs to build so they are able to adapt and change”, says Bruce MacDonald, CEO of Imagine Canada. “Every successful organization must be able to create the conditions that will enable future success, which I believe requires a strong commitment to analysis, coupled with the courage to try new things.”

And so, this issue is dedicated to “The Future of Fundraising”. To help us envision that future, we asked our Trends Advisory Board members ([click here to see list](#)) to share their thoughts about present and future fundraising trends--what are they seeing on their radar screens? What are their teams seeing? What keeps them up at night—and what are they doing about it?

Here’s what they had to say.

The Rise of Big Everything

The principal and most prevalent trends identified about fundraising can probably be best summed up by one word – big.

Fundraising today is characterized by big everything – big gifts, big campaigns, big expectations, big issues, big data, and big investment.

Charities' reliance on major gifts continues to grow with this revenue stream making up an increasing percentage of revenues at an ever increasing percentage of charities. And Canadians are also stepping up in unprecedented ways when it comes to the size of their gifts. Million dollar or even half million dollar gifts used to be a rarity, and while still incredibly transformative for the charities who are able to attract them, they have become much more routine. To illustrate, KCI's research team is aware of 1,166 gifts of \$500,000 or more that were made in Canada between 2012 and 2017, totalling \$4.62 billion.

We have also begun to witness the emergence of mega-givers in Canada, with gifts of \$50 million, and over \$100 million becoming more commonplace. "One of the top trends I've noticed is the emergence of more transformative gifts in just spectacular quanta," says Tennys Hanson, President and CEO of the Toronto General & Western Hospital Foundation. "While these extraordinary single gifts are still somewhat unusual in Canada, I believe that we will see more of these mega-gifts in the years to come."

Hanson notes that these big gifts, understandably, also come with big expectations on the part of the donors who make them. "Gifts of this magnitude come with significantly higher accountability requirements, which express themselves in

Philanthropy has had a long history of helping to address some of the most pressing issues of the times, and many of today's major philanthropists are continuing to aspire to similarly audacious goals, understanding the power and influence that their philanthropy can have.

the need to meet certain agreed upon deliverables, and for more regular and robust reporting to the donor. When it comes to major investments like these, or even those at more modest sizes, charities need to understand that stewardship is an absolute must – something that requires time and resources to do well."

Wendy McDowall, Chief Development Officer for the YMCA Greater Toronto, notes that big expectations on the part of donors manifest in other ways as well, including an interest in having a say in how their gifts will be used and directed as well as a greater degree of engagement once their gift is made. While not new, she is finding this phenomenon is becoming increasingly common. "We have donors who are investing more time and money, and as a result, they want to have a greater understanding of what's happening at the strategic level of the organization. We also find many donors want to be in the details with us on the projects they support. It's wonderful but it does mean that we have to keep them in the loop every step of the way."

Interest in Big Issues

Philanthropy has had a long history of helping to address some of the most pressing issues of the times, and many of

today's major philanthropists are continuing to aspire to similarly audacious goals, understanding the power and influence that their philanthropy can have. This phenomenon is probably best illustrated by two of the worlds' biggest philanthropists, Bill and Melinda Gates, in the 2018 version of their annual letter to stakeholders.

In it they write that they see their role as philanthropists as a complement to what can be accomplished by other means, such as government saying "we think there's always going to be a unique role for foundations. They're able to take a global view to find the greatest needs, take a long-term approach to solving tough problems and manage high-risk projects that governments can't take on and corporations won't. If a government tries an idea that fails, someone wasn't doing their job – and might lose his or her job in the next election cycle. Whereas if we don't try some ideas that fail, we're not doing our jobs."

Donors in Canada are similarly coming to the table with big vision and expectations when it comes to what they want to accomplish with their giving. "I'm seeing the desire on the part of many of our major gift donors to address big issues in society," says Bill Bean, President and CEO of QEII Health Sciences Centre Foundation in Halifax. "For instance in our case at the QEII, while they don't necessarily want to be involved in what they perceive as the responsibility of government, they do want to have a hand in tackling some of what they perceive as the big challenges facing health care today."

Jeff O'Hagan, Vice President of Advancement, York University, observes a similar interest on the part of their major investors. "We're seeing an even greater emphasis in our conversations with donors about the desire to see impact

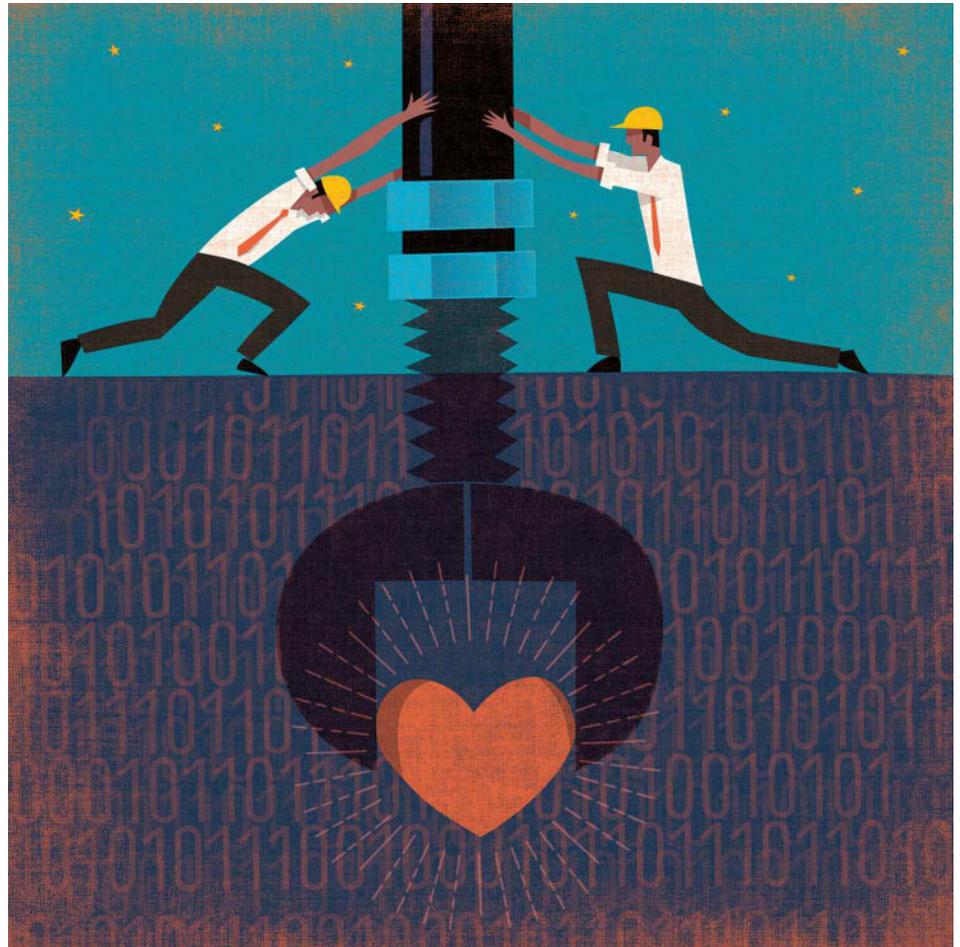
and real change as a result of their gifts that go beyond academic implications. A lot of what we're seeing is that while our major investors want to make an impact in specific areas, whether that is science, health, business, engineering etc., a common theme is that they want to see social change as well."

Meeting Internal Expectations

The "big" trend is also manifesting in the form of campaign goals. "The size and scope of campaigns are bigger than I've ever seen them before," notes Steve Hoscheit, President and CEO, Trillium Health Partners Foundation. KCI's research team confirms that there are \$15 billion in active campaigns currently ongoing... with more than 40 across the country with goals of \$100 million or more.

Hoscheit goes on to say that the move to bigger campaigns is in part a reflection of another important trend – increased dependence on fundraising as an important revenue stream and as a key strategic driver. "In addition to bigger campaigns, I've also never seen a greater reliance on foundations and fundraising for the success of the "mothership" organization. Along with that reliance is a far greater expectation related to our ability to deliver a greater volume of revenue and on a much more consistent basis than ever before."

According to Gary Durbeniuk, Vice President, Development, Calgary Zoo, these big expectations don't necessarily keep pace with the reality of major gift and campaign fundraising. "As we become increasingly reliant on major gifts, I feel like the 80/20 rule has become 98/2, which means that the implications of missing a gift or two are significant. Major donors work on their own timelines, not our timelines, and so there can be a lot of



unpredictability in our business. And when it comes to campaign fundraising, there is almost always a dip in revenue once campaign pledges are paid off. It's just a reality of the campaign cycle and you can't outrun it. And so, there is a continued need to educate boards and senior management about these fundraising realities."

Big Data and Going Digital

The final spot where "big" is having a major influence is the emergence of big data and going digital... and the need to make big investments in order to adapt to the requirements of this new reality.

"Charities must turn their attention to how to make best use of data analytics, business intelligence and Artificial Intel-

ligence (AI)," says Ted Garrard, CEO of SickKids Foundation. "We have seen the transformation that has happened in the private sector when it comes to using data strategically while we in the charitable sector have been slower at identifying the importance and power of this trend. The time has come for us to catch up."

Susan Horvath, CEO of the ROM Governors in Toronto concurs, "While I don't think many charities are at the stage of Amazon, where marketing is now rows of staff sitting at computers who monitor and track everything we do online, I do think there is power in data and I'm not sure that we are using the power of analytics to its full effect yet in the charitable sector. It's definitely something that we need to be doing more of." (continued on page 6)

KCI's Observations

In addition to the trends that have been identified by our Trends Advisory Board, we at KCI have been mulling over some additional ideas that we feel are critical and should be keeping an eye on.

1) Don't forget about Boomers and Gen X – While engaging and building relationships with the “next generation of philanthropists” as represented by Millennials and Generation Z is a must, it's important not to lose sight of the Boomers as well as the generation that tends to be forgotten, Gen X. Combined, these two generations make up more than 20 million people in Canada. It is estimated that Boomers are set to inherit \$750 billion over the next decade. Furthermore, we know unequivocally that people become more generous as they age, making these two groups of Canadians critically important for charities.

2) Co-opting of “charity” – Being charitable doesn't mean the same thing as it used to. More and more, there are new players emerging in the charitable space, including corporations who are choosing to have social good “baked into” their brand and products. As a result, we are seeing an increase in “philanthro-consumerism”. Millennials, in particular, tend to see charity as a lifestyle, defined more by the choices and purchases they make rather than by financial contributions to charitable organizations. This trend will require charities to rethink their fundraising, and, in some cases, their mission delivery strategies and mechanisms.

3) Evolving Nature of Corporate Giving – The philosophy of good corporate citizenship is rapidly evolving from the current “Partnership Model” that sees community support strategies aligned to business strategies to a “Core to Business Model,” where community engagement is a consideration in all aspects of the company's strategy. The implications for

the charitable sector are that in the Core to Business Model, community activities and engagement are baked into corporate strategy to a point that will result in a significant shift in the expectations that companies have of their relationships with charities.

4) Growing Importance (and Opportunity) of Women – Fueled by several factors, including the rise of the MeToo Movement, the growing economic and political power of women and the increasing numbers of single women with their own personal, financial means, it's been stated by many that 2018 will be the “Year of Women.” As women continue to take a greater place and role in society in general, there will be an opportunity for charities to tap into their philanthropic power and potential as well. Further evidence of their increasing importance is demonstrated by some research undertaken by Imagine Canada that found donations from women make up a significantly larger proportion of total donations than they used to, up from 36 percent in 1984 to 41 percent in 2014.

5) Building a Movement, Creating a Community – #TimesUp. #NeverAgain. These are two recent examples of movements that have created a groundswell of interest and engagement. More and more, people (and in particular young people) don't participate in charity out of a sense of obligation, but rather to be part of a movement or community. Creating a movement involves positioning your cause as bigger than your organization, raising sights about possibilities, and creating a draw to be a part of something important and game changing. Along with that comes the opportunity to create community, whether it be a community of values (group of people united through their beliefs) or a community of behaviour (group of people united by what they do). To illustrate the power of

movements in raising funds, consider that the TimesUp Legal Defense Fund has raised almost \$22 million in a couple of months through a GoFundMe campaign.

6) Creating/Capitalizing on Moments in Time – In an increasingly noisy and competitive world, creating a sense of focus and urgency is an important factor for charities in their fundraising efforts. To do that, charities should establish opportunities to focus attention and create a sense of momentum around making a donation, while ensuring the infrastructure is in place to capitalize on those moments where heightened donor interest can be converted into action. Ideas include creating fundraising appeals or “campaigns” associated with a specific time-frame, (e.g. Giving Days) or bundling opportunities for donors to support a particular priority or project and creating a mini-campaign around achieving the fundraising goal that goes with them. To be successful, it's crucial that marketing and communications activities be integrated with and support these campaigns.

7) Diminishing Trust in Institutions – There is a growing distrust of institutions in general and it appears that the charitable sector is not immune. According to research done in 2017 by Angus Reid Institute and CHIMP, the majority of Canadians (60%) are mistrusting of the institution of charity as a whole. An even more concerning statistic for the charitable sector as a whole is that this mistrust of charities' legitimacy and effectiveness skews younger, wealthier, and more educated than the rest of the Canadian population, with 60% of this particular group reporting that they would give more if they had more confidence in charities and how their money was being used. Growing the level of trust in the sector as a whole, as well as in your particular organization in particular, is critical.

Accompanying the interest in big data is acknowledgement of the digital revolution. "We really need to understand how technology is going to radically transform our business and the way in which we interact with our donors and stakeholders," says Barbara Grantham, CEO, VGH+UBC Hospital Foundation in Vancouver. "At the governance level, this means that we have to grapple with where will we invest and not invest and how we manage risk in murky waters. We're in a more volatile time, with

the risk factor higher than it was five years ago."

Changing Demographics and Generational Shifts

Of course one of the drivers of the need to adapt to digital technology is the shifting demographic landscape that makes up the Canadian population.

As of the last census, Canada's total population was just over 36 million people and

of that, 9.8 million fall into the category that we call Millennials (currently aged 20 to 37). Currently, Millennials number about the same as the Boomer generation, but in very short order, they will make up the largest segment of the Canadian population. And hot on their heels is Generation Z, the first generation that will have never known a world without the iPhone. These generations are digital natives, and so the ability to meet their needs and expectations in the realm of technology will be paramount.

Future of Fundraising

In addition to helping us identify the key trends affecting fundraising today, our Trends Advisory Board members indulged us in a "crystal ball" exercise.

We asked them to imagine what fundraising will look like 10 years from now. Here's a sampling of what they said. Some bold predictions with a fair amount of intersection and overlap between them...so we've categorized them into a few different themes.

In 2028, we can look back and see if they have come true!

1. Need for more collaboration and different business models

"I see a variety of different models when it comes to charitable organizations. For instance, one of the things I believe might happen is the emergence of shorter term charities - ones that aren't around for decades but are rather more pop-up in style."

Bruce MacDonald – CEO of Imagine Canada

"I foresee more charities merging. In a world where we aren't growing the pie and where donors want multiple players at the table rather than each solving

problems in their own unique ways, charities will be required to find ways to work together."

Ted Garrard – CEO, SickKids Foundation

"I wonder if we won't see a significant major collaboration between foundations and corporations to achieve results in an area where governments can't or won't focus. I'm thinking of issues like water and food security or public interest journalism."

Hilary Pearson – President, Philanthropic Foundations Canada

2. Fundraising will mean (and require) more than philanthropy

"I believe the demands and expectations that organizations will have of their fundraising operations will exceed the abilities of traditional philanthropy. As a result, the sector will need to develop and operationalize new means and mechanisms to generate funds beyond the realm of traditional fundraising and pure philanthropy."

Ken Mayhew – President and CEO, William Osler Health System Foundation

"We have an opportunity to have a more expanded offering that goes beyond philanthropy, tapping into expanded revenue

generation opportunities, including earned revenue, social enterprise and social finance. I believe the future will be organizations as social profit entities as opposed to charitable entities."

Steve Hoscheit – President and CEO, Trillium Health Partners Foundation

"I believe the legislative framework governing the charitable sector will be modernized and updated to remove some of the restraints on how charities can raise funds. The federal government made news in late 2015 about modernizing the Income Tax Act with regard to charities and although there hasn't been much action since then, the sector has continued to press hard for change. Will the government stick to its promise? I am going to be bold and say that it will."

Hilary Pearson – President, Philanthropic Foundations Canada

3a. We will live in a digital world...

"We will see retooled fundraising strategies to deal with digital world. 85% of people who come to the SickKids website today come through a mobile device and we know that's here to stay. We can all see how the private (continued on page 7)

For Horvath, this will mean a real shift in how we all communicate with our donors. "I'm seeing a real shift from written to visual. It's exciting but it means that we have to work differently and need to have different people on our team. And I think we also need to understand if this is true for all demographics, or just younger generations."

At SickKids Foundation, they are thinking about how they engage the next generation as well. "We are trying to find points

of engagement that are consistent with how this millennial generation thinks, acts, and does things. We know that this generation wants to be part of a movement. They don't want to be used gratuitously, and they truly want their time, expertise, and knowledge to be put to use in meaningful ways," says Ted Garrard. "We have started an initiative that is called Tech4SickKids, engaging the next generation of entrepreneurs who are creating these start-ups, looking for ways to engage them today even though they

are not in a financial position to make a significant gift just yet. But what we are doing is asking to pledge future equity, a "living planned gift" of sorts."

Persistent Cluster of Clichés

Everyone concurs that it's critical for charities to acknowledge and understand that utilizing AI and making the move to digital will also require big investment. But the belief is that the payoff is worth it...and in some cases, it will be a matter of survival.

Future of Fundraising (cont'd)

sector has retooled and it's something that is going to be required of us in the charitable sector as well. Conventional fundraising methodologies are simply not going to work."

Ted Garrard – CEO, SickKids Foundation

"Technology will lead the way. I think that organizations that are less risk averse and who are willing to change their worlds and the ways they operate are the ones that will survive. We see this type of innovation in the business world and it will be required of us as well."

Bill Bean – President and CEO, QEII Health Sciences Centre Foundation in Halifax

"The biggest single factor is that this new generation of Canadians is spending a lot of time looking at their phones and we are going to have to find ways of marketing through that method"

Rick Frost – CEO, The Winnipeg Foundation

3b. ... but personal connections will still be critical

"Fundraising will increasingly be focused on personal connection. While technology will certainly be used as an aid, the funda-

mental principle of a strong relationship with those who support you won't change."

Susan Horvath – CEO of the ROM Governors in Toronto

"I don't believe the basics will look a lot different. While there will be a combination of high touch and high tech, I don't think there will ever be a substitute for being donor centric and understanding what the donor is trying to accomplish. I don't think that will ever change."

Tennys Hanson – President and CEO, Toronto General & Western Hospital Foundation

"I think it will look different in the context of how we do fundraising depending on the technology, but I can't see fundraising not having the relationships. That's the basis of our business and that won't change."

Gary Durbeniuk – Vice President Development, Calgary Zoo

4. The Missing Middle? (Gifts and Organizations)

"I think in the future, we will run the risk of seeing mega/major gifts and micro gifts, but I wonder if we will have lost the "in between". I worry that this seems like the

direction we are headed if we don't do something to change the trajectory."

Wendy McDowall – Chief Development Officer YMCA Greater Toronto

"I anticipate that there will be fewer charities that are larger in scale. We will have realized economies of scale accompanied by a continued "professionalization" in the sector that recognizes the importance of designations and qualifications."

Barbara Grantham – CEO VGH+UBC Hospital Foundation

"I think we are going to see continued differentiation with very large charities at one end of the spectrum and a lot of the mom and pop style and/or breakthrough charities at the other. I also think those that will adapt to new technologies and communications will be the massive winners, which is directly related to their ability to invest."

Innes van Nostrand – Principal Appleby College

For more insights, listen to the March episode of **The Ask**, KCI's monthly podcast, which features an interview with KCI President and CEO Marnie Spears to hear her thoughts about the future of fundraising in Canada.

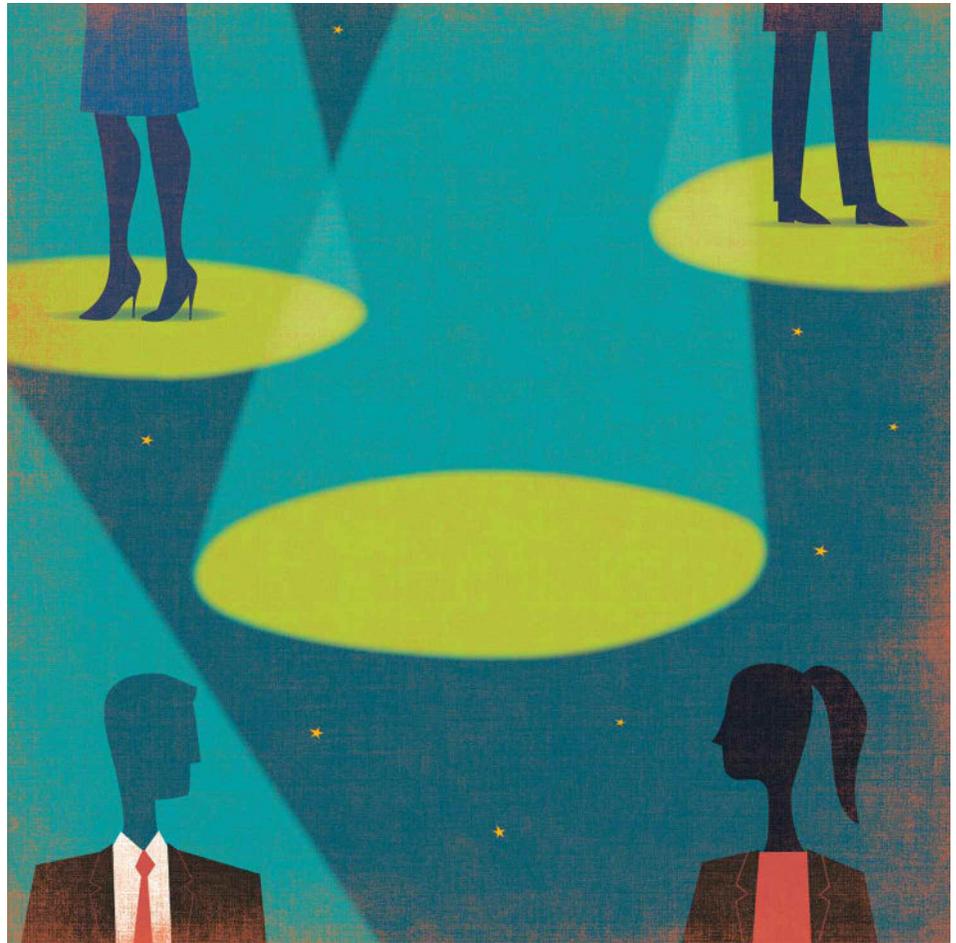
This need for investment unfortunately runs counter to what Malcolm Burrows, Head of Philanthropic Advisory Services calls the ongoing “cluster of clichés” that often prevents such investment from taking place. “Unfortunately, it’s still the usual suspects of the overhead myth, anything that doesn’t go to the “cause” is waste, everything should be done by volunteers, etc. That mindset persists in the minds of donors, which then limits that ability and willingness of charities to make investments. And based on all the changes that are happening in the world of fundraising today, investment is an absolute must.”

Barbara Grantham concurs. “Unfortunately, I don’t see the mindset of the starvation cycle changing. I suspect it will only be a few farsighted boards that have an investment mindset that will enable their organizations to truly lever what is possible with technology to drive forward the business. And I have to admit that for those that don’t, I’m concerned they run the risk of not being able to survive.”

Finding and Keeping Talent

The final issue on the minds of sector leaders is the question of talent – how to identify it, hire it, manage it, and develop it. And while this has long been an issue for the sector and profession, it’s taking up an even greater amount of time and mindshare.

“I think part of this is a generational change,” says Barbara Grantham. “When I retire, I will have been with two organizations. That just doesn’t happen anymore. At VGH+UBC Hospital Foundation, most of the team is under 45 and this is already their third or fourth job. And the reality of the current marketplace is that we can and should expect that they will be here for a few years and then move on again.



“The final issue on the minds of sector leaders is the question of talent - how to identify it, hire it, manage it, develop it. And while this has long been an issue for the sector and profession, it’s taking up an even greater amount of time and mindshare.”

As a result, we have to define carefully what we need, hire for that carefully and retain extremely intelligently.”

The spot that appears to be the most challenging is the function of major gifts. “With major gift fundraisers in such

demand, people have so much opportunity to move, but that’s problematic for the organizations,” says Innes van Nostrand, Principal at Appleby College. “Based on my experience in fundraising, I believe it takes seven years for a Major Gifts Officer to be fully functioning as that is how long it takes to develop the depth of relationships required to be successful.” While Van Nostrand admits that he’s not sure what the answer is, he does believe that one solution is to spend more time “growing your own” as well as recruiting people with transferable skills from other parts of the organization. “We also now recruit volunteers and others who are embedded in our community and are passionate about the School to assist us with our major gift fundraising on a short term contract basis.”

Penny Blackwood, Executive Director, Development at Memorial University in Newfoundland and Labrador, is also taking a “homegrown” approach to her talent management. “Our number one issue is staffing – attracting, recruiting, onboarding and then keeping really good staff. Perhaps based in part on where we are, I feel like the market is thinner than it ever has been. As a result, we have made the decision and commitment that we need to ‘home grow’ our talent.” She also believes that it’s time for the sector and profession to take the issue of attracting and onboarding talent with transferable skills more seriously. “We need to explore how can we diversify and talk about this field while also creating some really good training that enables us to identify those who have the strongest building blocks and then mold their experience to fit the reality of raising money for a non-profit. Finding someone who really has the skills and personality we need is perhaps the biggest (and costliest) issue”.

Balancing Uncertainty and Opportunity

While the economy overall is strong, the memory of 2008 still lingers within pockets of the country where the economy continues to be a bit tenuous (Alberta) or very challenging (Newfoundland and Labrador).

What do you think?

We want to hear from you!

Tell us what’s on your mind when it comes to fundraising and philanthropy in Canada today. What are you thinking about? What questions do you have? What do you think the future looks like? What do charities need to do to be prepared?

Take our very brief survey ([here](#)) to let us know what’s on your mind. It will help us to determine what topics we should be exploring in our upcoming editions of *Philanthropic Trends Quarterly* as well as in our monthly podcast **The Ask**.

Many thanks!

This uncertainty may be reflected in the recently released tax receipted giving data from 2016. Total claimed donations dropped 2.7% to \$8.9 billion while the percentage of tax filers claiming donations continued its slide, down to 20.5% from 21.0% in 2015. Perhaps most troubling is that the total number of donors dropped, which means it’s not just a decrease relative to population growth. Much of the decline was led by the western provinces, but StatsCan notes that while economic conditions played a part, they were by no means alone.

At the same time, there is much to be bullish about when it comes to philanthropy based on the convergence of several factors that could make the next while a very positive and productive time for the sector in Canada. “I’m seeing more and more people who are ready for philanthropy because of stage of life, asset

sales, and who have a strong sense of philanthropic confidence,” says Malcolm Burrows. “This coupled with the currently strong economy means that I feel like we are about to hit a time of “money in motion”. It won’t last forever because of economic cycles, but I’m encouraged and enthusiastic and think the sector as a whole needs to be ready to be able to seize the moment.”

As we look to 2018 and beyond, there is much to consider and keep our eye on. With all the changes that are happening in fundraising and philanthropy today, it’s definitely not a time to be complacent or to be in a “maintain the status quo” mode. But for those who heed the trends and think about what they mean for them and their organizations, the future of fundraising and philanthropy in Canada looks bright. >>

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FORWARD THINKING