



PREFACE



As the mouse living next to the elephant, we oftentimes accept, at equal value, the lessons learned and perceptions held from our American cousins as transferable to our Canadian lives. And we know, this isn't always true, and it certainly isn't always practical.

Philanthropy is no exception. Much of what we learn about philanthropy, and the profession of fundraising in particular, comes from examples south of the border. The pioneers in American philanthropy have imprinted upon Canadian leadership and the best practice that we emulate and espouse. In fact, many of the lessons that we've learned and take for granted, come from the giants in US philanthropy. Conferences, in particular offer the opportunity to meet and observe the American centric view of fundraising and philanthropy.

This is not bad thing. But it shouldn't be the only thing.



Canadians have always enjoyed adopting the best from other countries, accepting and rejecting when appropriate, and inventing and creating when needed. EFT (electronic funds transfer) is a good example. Here in Canada, and in fundraising specifically in Canada, EFT rules. It's a very popular practice amongst Canadians to use EFT to pay bills, make donations, and conduct business. But not so in the USA, where EFT has not been developed and honed, or accepted, to the same degree.

While research shows that the "Basic Job Analysis" for fundraising (the blueprint for what fundraising professionals say is the knowledge important for our work) is relatively similar between Canada, the USA, UK, Australia, New Zealand and other countries, there are differences.

In 2009/2010, CFRE International conducted a new job analysis engaging close to 3,000 professional fundraisers around the world, and discovered that in fact, there are some slight differences in how Canadians view the job analysis. In Canada for example, fundraisers rated engaging volunteers in fundraising as more important than did their colleagues in other countries, and as such, spent more time engaging volunteers in fundraising. Canadian fundraisers also indicated that they reported to constituents about the use and impact of donated funds more frequently than fundraisers in other countries.

There is no question that Canadians share more things in common with our colleagues around the world than not, and that the variations tend to be minimal. That is the strength of the fundraising profession. However, while some of these variations are modest, there is a nuance to what it is to be a Canadian fundraiser, and what it means to conduct fundraising successfully in Canada. That is the essence of what we hope to capture in *Excellence in Fundraising in Canada*.

ORGANIZATION OF THE BOOK

The idea for this book came from two great anthologies in fundraising. The first, a classic, *Achieving Excellence in Fundraising* has been a major success and has taught many in our profession about the Rosso model in fundraising. A second edition of the classic, published by

Jossey-Bass and edited by Eugene R. Tempel, became an outstanding resource for the profession. The second anthology, *The NonProfit Handbook in Fundraising*, published by AFP/Wiley and edited by Jim Greenfield, is equally ground-breaking in its contribution to the profession.

In both cases, contributions were made by dozens of American scholars and fundraising practitioners. A true collaboration of thought and ideas, these "text-books" have allowed many practitioners to learn about best practice and put the ideas into action.

And so we are hopeful that *Excellence in Fundraising in Canada* will contribute a uniquely Canadian perspective to the body of knowledge that exists. This book celebrates the contributions from 22 Canadian fundraising professionals, all leaders in their field – each providing a contribution with a Canadian point of view, and a Canadian perspective.

Excellence in Fundraising in Canada has the integrity of an integrated work. Each chapter addresses and contributes to an aspect of a total development program. But the book doesn't have to be read in sequential order - the reader can pick and choose from specific chapters that they wish to access. For example, readers seeking to learn more about online fundraising strategy and its relationship to other fundraising strategies will find chapter fourteen helpful.

Excellence in Fundraising in Canada will make an excellent textbook for college, university, and community courses on fundraising and resource development. It will also serve as a must-have resource for new professionals or those in mid-career who may have a strength in one area of development, but not another.

Many of the contributors to this book have published before, and are recognized as experts in their area of expertise. These authors are committed to the integrity of this profession, and have come together to bring the Canadian perspective to the professional practice of fundraising.

E.H. Guy Mallabone
Calgary, Alberta
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FOREWORD

BILL HALLETT, ACFRE

With the publication of *Excellence in Fundraising in Canada*, our understanding of Canada's philanthropic marketplace will change. In the last twenty-five years, a number of Canadian books about fundraising have been written but there has never been a comprehensive fundraising textbook written by Canadians for Canadians until the publication of this work.

Excellence in Fundraising in Canada, edited by Guy Mallabone, an outstanding leader in the fundraising profession, collectively represents more than 400 years of fundraising experience! The authors who contributed chapters to the book represent the geographic diversity of our country but are united in their passion for adding the Canadian fundraising experience to the profession's body of knowledge.

These professionals recognize the value of contributing their best practice learning to the next generation of those in our field who are advocates of "action for the common good."

Consider them the mentors you always wanted – ready to share insightful thoughts, unique reflections and visioning for a professional discipline that has only really emerged in the last forty years.

We know that demographic changes, economic upheaval and technological advances are shifting current philanthropic practices. This book, together with continued research, means we will no longer be dependent on texts and studies from other countries to understand our own unique Canadian philanthropic marketplace.

This text will undoubtedly be a resource for anyone who aspires to be a professional fundraiser, earning the Certified Fundraising Executive (CFRE) credential or any other certificate or degree offered by Canadian universities and colleges. But it is more than an academic resource. Human stories and flowing prose make it a book that is immensely readable, deserving to be on the bookshelf of every fundraiser, senior executive and board member in the not-for-profit, charitable sector in this country.

***Editors note:** Bill Hallet has provided leadership to the Canadian fundraising sector from the earliest days of the profession's organization. A leader. A best practice practitioner. A mentor. It is fitting that one of Canada's fundraising founding fathers provide the Foreword for this book.*