

# *Excellence In Fundraising In Canada*

## The Authors



### **Ken Wyman, CFRE**

For more than 35 years Ken has invented and adapted techniques to help non-profit groups learn the secrets of growth. He has helped hundreds of organizations raise millions of dollars. Ken is professor and program coordinator in the Fundraising and Volunteer Management postgraduate program at Humber in Toronto.

Ken is a trainer, academic, and author, and has published seven books. Ken was the host and creative consultant of the educational TV series *The Fund Raising Game*. The eight half-hour episodes are available on video tape, with a 270-page workbook. Ken has been named Outstanding Fundraiser of the Year by AFP Toronto chapter.

Ken's voluntary service is extensive and includes Imagine-Canada's Development Committee, and the MetaSoft Client Advisory Board. He was a founding board member of The Change Canada Charitable Foundation and of the Canada Advancing Philanthropy Board, and a member of the Social Planning and Allocation Committee of the Jewish Federation of Toronto as well as the board of Family Day Care Services, and Information London, to name just a few.

Earlier, as a journalist and photographer, Ken filed stories from across Canada, Europe, South America and the Middle East. He has reported for magazines, newspapers, CBC radio and TV news.



### **Dianne Lister, LL.B., CFRE**

Dianne Lister a lawyer and has held senior roles in Canada's charitable sector since 1986. Currently the President and Executive Director of the ROM (Royal Ontario Museum) Governors, Dianne is responsible for all philanthropic, sponsorship and stewardship programmes, and governance of the public foundation. Prior to her appointment at ROM, Dianne was the Vice President, External Relations and Advancement for Trent University and President and CEO of SickKids Hospital Foundation.

Dianne has served as a volunteer with the Association of Fundraising Professionals (AFP), holding positions as president of the Toronto Chapter, Chair of the AFP Canada Council, Chair of the AFP Government Relations, and more recently, served as a member of the international AFP Ethics Committee for 9 years (holding the position of Chair in 2007-2009). Dianne has also served on corporate boards. She is currently a member of the Boards of the Community Foundation of Greater Peterborough, and of the Citizens' Alliance United for a Sustainable Environment (CAUSE).



### **Pearl Veenema, FAHP**

Since August 2007, Pearl has been President & CEO of the Hamilton Health Sciences Foundation. The Foundation raises philanthropic gifts to support one of the most comprehensive healthcare systems in Canada, providing specialized services to patients from pre-conception through to aging adults.

Pearl began her healthcare career in nursing and has had extensive experience in healthcare administration, public affairs, marketing and as a patient representative. In 1999, Pearl decided to focus her career in healthcare development. Her experience ranges from a Chief Development Officer for a small foundation, Managing Director of Campaigns for a \$500 million campaign in Toronto to Vice President Advancement for a large foundation.

She is a Fellow of the Association for Healthcare Philanthropy (AHP) and a Certified Fund Raising Executive, CFRE International. In both organizations she has served as Chair. Currently Pearl is Chair, AHP University-based Programs (Madison Institute).



### **Peter McKinley, MLIS**

In May, 2004 Peter introduced a pioneering graduate-level Prospect Research course in the Masters of Library and Information Science program at the University of Western Ontario. Currently, Peter serves as Director of Development and Donor Relations at Brock University which is transforming philanthropy in the Niagara region.

In the various roles of manager, consultant, teacher and researcher, Peter has consistently pursued the goal of increasing the level of knowledge about donor capacity and philanthropic intent in the non-profit sector. Peter has successfully transferred this knowledge through presentations to professional associations, and in workshops for non-profit organizations.

Peter has a BA (Honours History) and a Masters of Library and Information Science, both from the University of Western Ontario, and has completed the Finance for non-Financial Managers executive program at the Ivey Business School, and the Applied Research Methods program of the American Marketing Association.



### **Nick Jaffer, B.Comm.**

Nick is a leading fundraising professional with 22 years of international experience in education, health and community based organisations. He has broad and diverse experiences in relationship development and management, capital campaigns, major and planned gifts, annual giving, special and signature event fund raising, and volunteer and project management.

Transplanted from Edmonton, Alberta, Nick moved to Australia to serve as Director of Development at the University of Sydney, overseeing their integrated fundraising program. Prior to this, Nick served as the Director of Annual Giving at the University of Alberta, and also worked with the Leukaemia Foundation, the Alberta Lung Association, and the Aga Khan Foundation.

Nick currently serves as Senior Consultant with Global Philanthropic where he heads up the Sydney operations, and is a popular speaker at Australasian fundraising conferences. Nick has been recognised for his work by CASE and the Edmonton AFP Chapter.



## **Steve Thomas, MA, CFRE**

Steve Thomas has been described as both the 'Guru' and the 'Godfather' of Canadian direct response fundraising. Though he started off life as a historical geographer and a teacher, he has been a fundraiser for well over 30 years.

Steve's career has included working with Oxfam Canada as development director, and in 1980 he founded Stephen Thomas Limited, Canada's first direct response fundraising agency working exclusively in the not-for-profit sector.

Steve was recognized by the Canadian (Direct) Marketing Association with the Directors' Choice Lifetime Achievement Award and by AFP Greater Toronto Chapter with the Outstanding Fundraising Executive Award. In 2006, Steve was honoured by Amnesty International for 25 years of service.

A gifted speaker and presenter, Steve has lectured world-wide on the topics of marketing and fundraising. Steve is Chair of the Advisory Committee of the Humber College Fundraising Program.

In 2008 Steve was Fundraiser in Residence at York University. He is now chairman of the Amnesty International Human Rights House Campaign.

One of the original founders and past Chair of the Canadian Fundraising Congress, Steve is past president of the AFP Greater Toronto Chapter. Steve has served as Chair of the International Fundraising Congress (Amsterdam) and is currently co-chair of the London based Resource Alliance.



## **Hala Bissada, BComm, CFRE**

Hala Bissada is an international award-winning event-producer and one of Canada's foremost event fundraisers with 18 years of experience.

Prior to establishing Hala Events and Communications Inc., an international events firm, Hala spent 5 years with SickKids Foundation where she managed several complex events.

Hala has worked as the Chief Development Officer for the Children's Aid Foundation, and established Hala Events & Communications Inc. in 2004, Hala has won 4 international awards, 4 national awards and 5 provincial awards for her innovative work.

Hala taught Media studies at Humber School of Media Studies and Technology for four years, and is a faculty member at Ryerson University. She has been a former Board member of AFP Toronto Chapter, has chaired the AFP Fundraising Day Conference, and is a much sought-after speaker.

Hala holds a Bachelor of Commerce degree from Ryerson University and is a Certified Fund Raising Executive. Hala's was nominated for Canada's national newspaper's (the Globe & Mail) Top 40 Under 40 award and Royal Bank of Canada's Women Entrepreneur of the Year.



## **Harvey McKinnon, BA, CFRE**

Harvey McKinnon is recognized as one of North America's leading fundraising experts. He has authored the only books on monthly giving: *Hidden Gold*, and *Tiny Essentials of Monthly Committed Giving*. He is the co-author of the international bestseller, *The Power of Giving*, and Winner of the Nautilus Gold Award for books on social change

His latest book: *The 11 Questions Every Donor Asks* has received rave reviews. Fundraising guru Jerold Panas calls it, "a beautifully polished gem." The UK's Management Centre says it is one of top 6 must-read fundraising books.

An award-winning copywriter, Harvey has written for numerous publications including *Grassroots Fundraising Journal*, *Contributions*, Mal Warwick's newsletter *Successful Direct Mail*, *Telephone and Online Fundraising*, *The Globe and Mail*, *Toronto Star* and many others.

Harvey is a highly-rated speaker who is regularly invited to present at AFP regional and international conferences, CCAE, AHP national and international events, and the IFC (Netherlands). He has been a member of many non-profit and business boards, including the Resource Alliance (North America).

His company Harvey McKinnon Associates has offices in Vancouver and Toronto, and it works with many of Canada's leading non-profits.

## **Guy Mallabone, MA, CFRE**



Guy is recognized internationally as one of the non-profit sector's most thoughtful and inspiring fundraising leaders. Since 1980 he has been providing exceptional advice and service to the non-profit sector

Guy is currently President and CEO of Global Philanthropic, and has served as Vice-President of External Relations for SAIT Polytechnic and Chief Development Officer for the University of Alberta, as well as senior fundraising positions at the Canadian Red Cross Society and cultural non-profit organizations.

Guy is an active volunteer and has served as a former member of the International Board of Directors for AFP and CFRE International. He currently serves as Chair of Canada Advancing Philanthropy (a national advocacy group), and is currently an Adjunct Professor for the Master in Fundraising program at the University of Bologna, Italy.

Guy is a regular 'heavy hitter' speaker and presenter on fund development at international conferences in Canada, the United States, Europe, South Africa and Australasia. Guy was recognized in 1999 by the Edmonton Chapter of AFP as the Outstanding Fundraising Professional, and in 2009 by Alberta Venture Magazine as one of Alberta's most influential citizens and by the Calgary Herald in 2009 as one of Calgary's 20 most compelling citizens.



## **Tony Myers, PhD, CFRE**

Tony is the founder, principal and senior fundraising council with Myers & Associates, an international fundraising consultancy based in Canada with offices in Calgary and Edmonton.

Tony has spoken and made presentations on philanthropy, development and fundraising on four continents. He is sought after as a speaker on numerous topics related to his work, at conferences around the world.

He has participated in some of the largest and most successful fundraising campaigns in Canada. His work has been recognized through national and international awards. He has written articles for Canadian Fundraiser, local fundraising publications, has recently completed a chapter for "Fundraising Feasibility Studies" and is currently working on a book on Philanthropy.

Tony just completed his PhD – a comparative study on primary influences on philanthropic decision-making in Canada and India. Tony brings a passion and commitment to his work in the support of philanthropy.

## **Nicholas Offord, BA**



Nicholas Offord began in fundraising as a capital campaign consultant with KCI Canada in 1984. He went on to join the Development Office at McGill University and led the department as Executive Director and was recognized with the Gold Medal for "Best Development Program" from the Canadian Council for the Advancement of Education, Nicholas then moved on to become President of Mount Sinai Hospital Foundation and Vice-President, Resource and Development of Mount Sinai Hospital.

Offord is a well-known speaker across Canada on fundraising and community development. In 1999, the Toronto Chapter of AFP awarded him "Outstanding Executive of the Year". In 2000, he was selected as one of "Canada's Top 40 Leaders Under 40" by the Report on Business magazine. He now leads The Offord Group, a national consulting firm to the charitable sector.



## **Val Hoey, MA, CFRE**

Valerie has over 30 years' experience in the non-profit sector. She became acquainted with the sector while working for an International Development Organization, CUSO and spent time working in Papua New Guinea, Solomon Islands and Vanuatu along with being the Regional Director for Alberta. Val was responsible for all fundraising in Alberta, Manitoba, Saskatchewan and the Territories as CUSO's first Major Gift Officer in Western Canada.

Valerie served as the Director of Planned Giving and Associate Director of Development at the University of Alberta, and then relocated to Calgary where she is currently the Associate Vice President of College Advancement at Bow Valley College.

Valerie has a long history of volunteer involvement with the Association of Fundraising Professionals, she was an inaugural member of the Edmonton Chapter, Membership Chair, Vice-President and President, along with holding volunteer roles such as the Calgary Chapter. Val has presented at numerous workshops on topics such as Planned Giving, Major Giving, Ethics, Fundraising Fundamentals and most recently for Centre Point in Calgary on the Role of Brand Promise in Fundraising.



## **Richard L.H. Walker, BSc**

Richard Walker is the Principle Partner and President of the Walker Resource Group a consultancy based in western Canada. A professional Project Manager by training, Mr. Walker holds a Bachelor of Science Degree from the University of Victoria and is an Alumni of the Banff Centre School of Management.

Richard was former President and CEO of WorldSkills Calgary 2009, CEO of the Jubilee Auditorium Foundation, V.P. of Ducks Unlimited Canada and Managing Director of the University of Alberta office in Southern Alberta.

He has been a guest lecturer at the Saskatchewan Institute of Applied Science and Technology, the University of Victoria and a guest presenter at Cambridge University in the U.K. Mr Walker has been a key note speaker at several conferences including the Canadian Council of Ministers of Education, the Association of Canadian Community Colleges and has made several presentations to the Parliament of Canada and provincial governments across the country.



## **Mike Johnston**

Michael Johnston is the President and founder of the Hewitt and Johnston Consultants and the co-founder of two globally based companies, The Global Legacy Giving Group and the sports-based Fantasy Fundraising.

He has been a fundraiser for 22 years, and has worked with 100's of nonprofit organizations in Canada, the U.S., Europe, Latin America, and Asia Pacific. Mike is an expert in direct response fundraising innovation and integrated campaigning – most especially in the use of new media technologies like the web and other new technologies and their integration with traditional direct response methods. He is the author of *The Fund Raiser's Guide to the Internet*, *The Nonprofit Guide to the Internet* and the editor of two books: *Internet Strategies: Best Practices for Marketing*, and *Direct Response Fund Raising: Mastering New Trends for Results*. Mike is also a contributor to numerous books.

Mike was a founding Board Member of the Washington-based e-Philanthropy Foundation, and was its first chair of its Education Committee. In addition, Michael was the founding Foundation Chair for the first global charity online lottery, [www.globelot.com](http://www.globelot.com).

## **Leslie Weir, MA, ACFRE**



Leslie helps people focus and plan their philanthropy offering information, resources and consulting services, and she coordinates the Foundation's Legacy Circle program. She brings to her role thirty years of experience in a variety of roles and philanthropic settings. She holds the Certified Fundraising Executive (CFRE) and Advanced Certified Fundraising Executive (ACFRE) professional designations and is a Master Teacher for the Association of Fundraising Professionals (AFP) International. She has a M. A. in Philanthropy and Development (Saint Mary's University of Minnesota) and a BA (University of Manitoba).

An active volunteer, Leslie serves on the boards of the Rotary Club of Winnipeg, the Canadian Association for Family Enterprise Manitoba Chapter (CAFÉ Manitoba) and as a judge for the Future Leaders of Manitoba Awards (Community Service category). She is member of the AFP International Publishing Advisory Committee and CFRE International Accreditation Board committees.



### **Luce Moreau, CFRE**

Luce Moreau is a professional fundraiser with more than twenty years of experience. She possesses a Certificate in Public Relations from the Université de Montréal, and currently is the President & Chief Executive Officer of the Orchestre Métropolitain in Quebec.

Luce has served as President and CEO for both the Fondation du Centre hospitalier Jacques-Viger, and also the Fondation Centre de santé et de services sociaux (CSSS) Jeanne-Mance.

In her career, Luce has received many Awards, grants and bursaries. She annually attends major national and international conferences and provides professional training sessions and conferences in North-America and abroad.



### **Andrea McManus, CFRE**

Andrea has over 26 years of strategic philanthropic experience in fundraising, and currently serves as President of The Development Group.

Andrea is well known leader in the nonprofit sector locally, nationally and internationally, and is the current Chair of the Association Fundraising Professionals (AFP) International Board – the first non-American to hold that position. Andrea also served as former President of the Calgary Chapter of AFP, and was the founding chair of the AFP Foundation for Philanthropy Canada.

Andrea is an active community volunteer and leader and is a board member and immediate past-Chair of the Calgary Chamber of Voluntary Organizations; sits on Imagine Canada's Ethical Code Advisory Committee; and is a member of the Canada Revenue Agency Charities Technical Issues Working Group. She is a past member of the Advisory Council for the Institute of Non-Profit Studies at Mount Royal University.

Andrea was recognized by the Calgary Chapter for her contributions to the profession as the inaugural recipient of its Outstanding Fundraising Professional Award. Andrea serves as a Master Teacher and speaks frequently at conferences and workshops in Canada.



### **Boyd McBride, MA, CFRE**

Boyd McBride has served as the National Director of SOS Children's Villages Canada since 2001, and worked in the international development community for most of his career, beginning with CUSO (now CUSO/VSO) over 25 years ago. He gained further experience while in fundraising and in leadership roles at the Canadian Red Cross Society, the Canadian Organization for Development through Education (CODE) and the Canadian Paraplegic Association. His work and professional consultancies have taken him to South and East Asia, Latin America and Africa.

Boyd is also an experienced educator. For many years he coordinated the National Program in Fundraising Education for Algonquin College and was deeply involved in curriculum development for that Program. He has presented numerous workshops and has worked with Boards of Directors and staff groups for organizations across Canada and as far away as Brazil and Guyana.

Boyd received his BA from the University of Alberta and his MA in International Affairs from the Patterson School at Carleton University. He earned his CFRE (Certified Fundraising Executive) in 1994.



## **Tania Brandstrom, MA, CFRE**

Tania Brandstrom came to the charitable sector in 2002 with a Bachelor's Degree in Political Science from the University of Calgary, and diverse industry experience that includes shareholder relations, event management, and public company compliance. In her role as Associate Director of Development and Advancement Services with SAIT Polytechnic in Calgary, she has established a culture of partnership-based service that reflects her strong commitment to team engagement and collaboration.

In 2008 Tania completed her Master's Degree in Philanthropy and Development from Saint Mary's University of Minnesota, where her capstone focused on the use of citizen engagement as a tool for advancing social justice causes in the Canadian not-for-profit sector.

An Active member of AFP (Association of Fundraising Professionals) and AASP (Association for Advancement Services Professionals), Tania is a frequent presenter on issues and trends impacting Advancement Services functions and performance, and is the sole Canadian representative on AASP's Best Practices Team.



## **Pat Hardy, MA, ACFRE**

Pat Hardy began her career as a fundraiser in 1982 with the United Way of Winnipeg. During her career she has worked for numerous non-profit organizations, including the University of Winnipeg.

Pat teaches the Essentials of Fundraising for Red River College and is certified as a Master Teacher through the AFP Faculty Academy; Pat's fundraising courses are popular with fundraisers, executive directors and board volunteers.

Pat was the first Canadian to achieve certification as an Advanced Certified Fundraising Executive (ACFRE), and also holds a Masters in Philanthropy and Development.

A recognized leader in the profession, Pat was instrumental in starting AFP Manitoba and Leave a Legacy Manitoba which included the first Winnipeg fundraising conference in the launch. Pat mentors fundraisers working toward their CFRE and was honoured by the Association of Fundraising Professionals with the establishment of the Patricia Hardy Scholarship for Advancement.

Pat is a member of the Association of Fundraising Professionals, the Association for Research in the Non-Profit and Voluntary Sector and Arts Consultants Canada.

Sharilyn Hale, M.A., CFRE



Sharilyn is Principal of Watermark Philanthropic Advising. Sharilyn previously led Canada's largest capital campaign in support of affordable and supportive housing for the YWCA, where women's leadership and philanthropy set new records in the sector. Her background spans fifteen years fundraising for social service and arts organizations, in addition to private sector experience in marketing and communications.

Sharilyn is a strong advocate for voluntary fundraising certification and is Chair of the Board of CFRE International, the global fundraising credential setting standards for effective and ethical practice. In 2009/2010 she led CFREI's job analysis study which explored fundraising across eight countries, in order to identify and articulate the core body of professional knowledge.

An enthusiastic mentor and speaker, Sharilyn has published articles and has contributed to a number of books including *Achieving Excellence in Fundraising* 3rd ed. (2011).

Sharilyn holds an MA in Philanthropy & Development, and was a member of Canada Advancing Philanthropy, a volunteer driven effort to initiate Canada's first graduate degree program in Philanthropy. A member of the Association of Fundraising Professionals and the Canadian Association of Gift Planning, Sharilyn also serves as a Director of Canadian Feed the Children.

John M. Bouza, BA, MA, CFRE



John has thirty years experience in fundraising, marketing, and communications principally as the founder and president of Bouza & Associates Inc. and CanFund – Canadian Centre for Fundraising. John has worked for and/or advised a wide range of nonprofit institutions designing effective, unique resource development initiatives. He has successfully organized every type of fund development activity from capital campaigns to special events to direct mail programs.

Major projects and campaigns have included: Canada Science and Technology Museums Corporation Foundation, Ottawa Rotary Home, University of Ottawa Heart Institute, Aga Khan Foundation, Boys and Girls Club, Ashbury College, Villa Marconi, and Fulbright Foundation, CARE Canada and Ottawa Civic Hospital Foundation.

John was the first person in Ottawa to earn the Certified Fund Raising Executive (CFRE) designation. His longstanding and passionate commitment to the non-profit sector and his tenure as a fundraising professional were recognized by his peers in 1998 when he was awarded the Outstanding Fundraising Executive Award by AFP Ottawa Chapter.