

Offering strategies for meaningful giving, receiving and leading

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Client Kudos

Boards Get a B-minus in Performance...and a C in Fundraising

Do You Have a Philanthropic Plan?

Five Daughters Honour Their Mother

Sandals Foundation Benefits Caribbean

What Does the New Stats-Can Data on Giving Mean For Your Organization?



Sharilyn Hale, MA, CFRE  
Founder & Principal

"Yesterday I was clever, so I wanted to change the world. Today I am wise, so I am changing myself."

- Rumi

## CLIENT KUDOS

Watermark has been delighted to support the [My Class Needs Foundation](#) as they chart their future path as change agents. Engaging an innovative crowdfunding platform for fundraising, the Foundation supports close to 10,000 students in classrooms across Canada. The Foundation is the philanthropic arm of [Curriculum Services Canada](#) which designs quality learning solutions for industry, education and the public sector.

CEO of both organizations Amy Coupal says, *"With a strong knowledge base in governance and Board leadership, Sharilyn challenged our thinking and guided us through a process to determine clear steps to continuous improvement. Her approach set us on a path that will have a lasting, positive impact, well beyond the scope of her engagement."*  
Thanks Amy!

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Hmm...I'm not sure which is harder.  
- Sharilyn

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## FREE Women's Philanthropy webinar March 4th

Join Sharilyn and Jo-Anne Ryan of TD Bank's Philanthropic Advisory Services for a webinar on the latest research on women's philanthropy in Canada hosted by the Canadian Charity Law Association, prior to International Women's Day.

[Register here for FREE.](#)

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## Sandals Foundation grows to benefit Caribbean communities

Think of Caribbean holiday luxury and [Sandals Resorts](#) may very well come to mind. Founded and owned by the Stewart family of Jamaica, they've not only expanded their business to 24 properties in 7 countries but in 2009, they established the [Sandals Foundation](#) with the aim of improving the quality of life for Caribbean people.

Since that time the Foundation has engaged in numerous partnerships and directed close to \$20 million USD to more than 300 community, educational and environmental programs across the region.

Foundation President Adam Stewart anticipates the Foundation *"will be in the top three largest in the Caribbean within the next three years."*

Having grown up in and worked with NGO's in the region I know this is great news for Caribbean communities facing tremendous social and economic challenges.



Congratulations to [United Way Toronto](#) for raising an astounding \$117,000,000 in 2014! Marking this success at their recent annual Campaign Celebration Dinner, the funds will help create **#infinitepossibilities** for people across Toronto.

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## Nonprofit Leaders Give Boards a B-minus in Overall Performance

According to a new study from BoardSource, [Leading with Intent: A National Index of Nonprofit Board Practices](#), boards describe there is room for improvement in their governance practices and performance. While the research was conducted among US nonprofit CEO's and Board Chairs, Watermark's experience suggests the trends identified also resonate in Canada.

Leaders gave boards a solid A for commitment to mission, but B's for functional internal work such as financial and legal oversight. What was graded the lowest? Boards got a C for embracing their role in fundraising. Not surprisingly, both CEO's and board chairs identified this as one of the most pressing areas for board improvement. How does your board rate?



Sharilyn is a BoardSource Certified Governance Trainer, offering comprehensive training - including the board's role in fundraising - and governance assessments for nonprofit boards and executive leaders.

[BoardSource](#) is a leading organization focused on strengthening and

supporting nonprofit board leadership, and offers a broad range of quality resources towards which Watermark clients receive a 10% discount.

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## What's Your Philanthropic Plan?

Whether you feel you have a little or a lot to give, do you have a plan? Proactively considering your philanthropy will ensure your gifts are meaningful to you and have a positive social benefit. Consider these 5 pillars:

**1. MISSION** - What do you care about? What drives your



Adam Stewart - CEO,  
Sandals Resorts International and  
President, Sandals Foundation

## Fewer donors - and older donors - giving more

Statistics Canada has released Giving, Volunteering and Participating data (2013). What do the findings mean for your fund development and board governance strategies?

- Canadians gave \$13 billion to charitable/non-profit organizations, up 14% since 2010, yet the percentage of Canadians donating dropped from 84% to 82% since 2010.
- Donors are getting older - 35% were aged 55 and over, up from 29% in 2004. And they give almost twice as much as their younger counter-parts.
- Volunteers devoted almost 2 billion hours to volunteer activities - equivalent to 1 million jobs, yet the proportion of Canadians who volunteered declined by 3% since 2010.
- 42% of volunteers 55 years and older serve on a committee or board, compared to 26% of those 34 years and younger.

[Read the full report.](#)

## NEXT ISSUE

**The Advocacy Chill:** what boards need to know about 'political activity'

**United Way Worldwide**  
building on cultures of philanthropy

**The Ins and Outs of Fundraising Costs**

philanthropic impulse? What do you want to accomplish through your giving? Within what time?

**2. AMOUNT** - How much do you have or want to give? How will you determine this e.g. a set amount or a percentage of your income or assets?

**3. CAUSE(S)** - What groups or organizations are effectively addressing the issues you care about? How will you assess them and make gift decisions? What kind of relationship do you want/need with those you support?

**4. METHOD** - How will you give? From your income or assets? One time, multi-year or a future legacy? Individually, collectively (e.g. your family, a donor circle), through a foundation or a donor-advised fund?

**5. IMPACT** - How will you evaluate the impact of your giving? What experiences or information will you need? How will you approach ongoing learning as a philanthropist?

Watermark offers discrete support to philanthropists ranging from developing customized giving and volunteering portfolios to providing orientation to specific areas of the nonprofit sector and conducting research and due diligence. [Learn more.](#)

Also see Imagine Canada's new [Guide to Giving](#) which includes other helpful resources for donors.

## Five daughters honour their mother with \$1 million gift to help women flee abuse

Julia M. Ruby was a tireless volunteer with the YWCA for over 60 years, working to advance the security and wellbeing of women and girls around the world. Honouring her legacy, her daughters recently joined to give \$1 million to the [YWCA December 6 Fund](#). Privileged to have known Julia, I'm certain she would have been proud of her daughters' philanthropy.



Daughters of Julia M. Ruby | Photo - Light Monkey

The YWCA December 6 Fund offers interest-free loans that help women leave violence and rebuild their lives. When they get back on their feet, they repay the loans, freeing up the funds for other women in need.

Thank you Joanna, Julia, Jan, Mary and Victoria for enabling the YWCA to double the number of women helped by the Fund.

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