

# WATERMARK MATTERS

## October 2018



### **Your Philanthropy Matters.** **Strategy ~ Family Engagement ~ Governance**

It's been awhile since you heard from us, but phew - we've been busy!  
New clients, expanded services and deepened knowledge about giving and governance  
to share with you. In your service,

Sharilyn

## Philanthropy & Growing Goodness in the Next Generation

For resource-rich families a common concern is ensuring the next generation is raised to be kind, generous and grounded. In our work with families, Watermark knows philanthropy is a powerful vehicle for probing, teaching and strengthening these qualities across all ages.

Using 10 leading practices\* identified by families and researchers, Watermark can support you and your family step by step on a journey to engage philanthropy to grow goodness in every generation.

Client J. N. says, *"I wasn't sure what to expect at first but Watermark's Growing Goodness has really been transformational for me, and my family."*

Contact [Sharilyn](#) to explore the potential of your family's philanthropy.

\* Walk your talk; Tell family stories; Clarify your values; Say thanks; Help others; Cultivate self-esteem; Teach financial literacy; Convey the importance of work; Convene conversations; Launch.



## Director Education: Exploring options for you and your board



Sharilyn recently achieved the [Chartered Director \(C.Dir\)](#)\* credential in corporate governance and has since fielded many inquiries about director education options for social profit leaders, chief fundraisers and volunteers who serve on the boards of registered charities, nonprofits, or public or private foundations.

Professional credential programs such as the [C.Dir](#) and [ICD.D](#) offer an intensive deep dive into corporate governance. While private and publicly traded companies are the focus, these programs also consider public and nonprofit contexts recognizing corporate governance principles resonate across sectors. A significant investment of time and money, these programs serve those deeply interested and engaged in governance work. At the least, recruiting directors who hold these credentials can bring expertise and exceptional value to your board.

The [Institute of Corporate Directors](#) (ICD) is also a valuable resource. Sharilyn is a director of the [Toronto Public Library Foundation](#) which provides annual ICD memberships and encourages directors to access the resources and learning opportunities. Foundation President Jennifer Jones says, *"Investing in the board's professional development is a strategic way to maximize director's ability to support the Foundation, while creating added value to their volunteer experience gaining even more knowledge and expertise"*. The ICD also offers a two-day Not for Profit Governance Program developed in partnership with the Rotman School of Management. Offered across the country, scholarships are available for eligible candidates.

For many volunteer directors and boards however, customized governance workshops are the most effective and accessible. Watermark offers a suite of [director education experiences](#) and coaching to meet the needs of your board but also crafted to build the social cohesion and capacity critical to board effectiveness, including:

- Board Leadership & Engagement: Fundamentals for Success
- Show Me the Money: Creating a Fundraising Culture
- Strategic Board Recruitment & Development
- Practices of High-Performing Boards: What the Best Boards Do Well

- The Board/Staff Partnership: How to Share Leadership and Get Results
- Board Self-Assessment and Action Planning

Book your next director education experience with [Watermark](#) today.

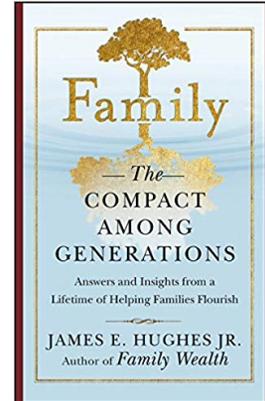
\* Sharilyn has over 20 years experience working with boards and is a certified advisor and trainer with BoardSource, the leading resource for nonprofit governance.

## Resource in the Spotlight

### Family: The Compact Among the Generations

It's not surprising author James E. Hughes Jr has been coined the "philosopher of family". This book is an extraordinarily spiritual yet practical exploration of family-ness and the governance and personal development approaches that can help families of wealth flourish.

If you work with families as an advisor, manager or even chief fundraiser - or if you navigate dynamics within your own family (ahem) - this book offers significant insights, ah-ha's and may even bring more than one heartfelt tear to your eye.



## Watermark Grows to Serve You Better

This year, Watermark clients have benefited from the expertise and professionalism of Mridula Joyner, CFRE. As Senior Advisor she has extended Watermark's bench strength and skillfully provided counsel and support on a range of major capital campaigns and strategic initiatives.

Mridula is a certified fundraising executive with a 20+ year fundraising career. She's raised millions of dollars in philanthropic investments in support of healthcare, child welfare, and youth development for organizations including Women's College Hospital, YMCA Greater Toronto, Ronald McDonald House, SickKids Hospital and University Health Network.



Let [Watermark](#) assist you with fund development/campaign strategy, assessment and training.

## Canadian Research on Governance in Family Philanthropy

Some readers may know Sharilyn is currently earning a doctorate in leadership. After coursework in leadership theory, organizational development and change, and adult learning, her research is now focused on governance and multi-generational family philanthropy. Given the ways families engage in philanthropy are changing, there are both private and public interests in better understanding the role of governance in their giving.

Watermark looks forward to sharing the results of this exploration in 2019, and thanks the families who are generously opening their doors and hearts to help us learn and advance thinking and practice.

## Where's Sharilyn?



**October 17-18**  
[Philanthropic Foundations Canada](#)  
Connect. Create. Change.  
Toronto, Canada

**November 6**  
[Toronto Social Capital Study Launch](#)  
Toronto Foundation/Environics Institute  
Toronto, Canada

**November 8**  
[Imagine Canada, Charity Accreditation Panel](#)  
Toronto, Canada

**November 15-17**  
[Arnova](#)  
How Philanthropy, Nonprofits and Volunteers  
Bridge the Gap Between Crisis and  
Sustainability  
Austin, Texas

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"Philanthropy exists because of two truths about the human condition -  
things often go wrong, and things could always be better."  
(Peyton & Moody, 2008)

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