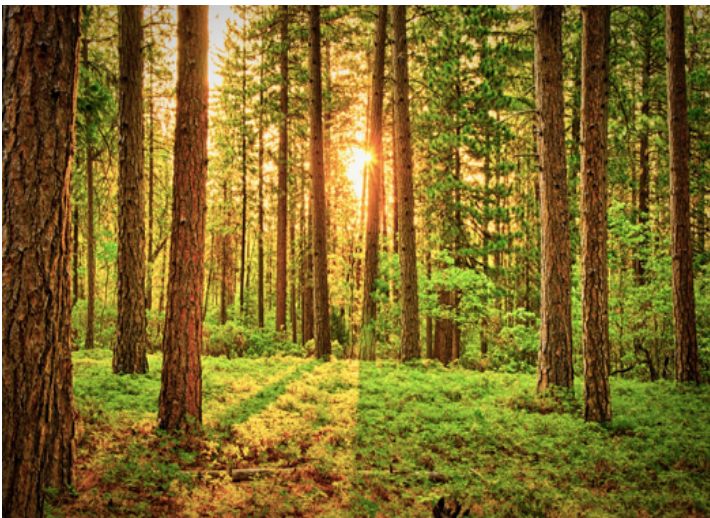


What is your charity's impact?



Would you like to increase it?

And be the modern, problem-solving and dynamic charity you know you can be.

The Changing Charity Landscape



During the past decade the charitable sector in Canada and around the world has become much more complex.

The number of charities in the sector has grown dramatically. The influence of wealth has never been greater. The amount of money being spent on fundraising by the biggest charities has grown exponentially and their dominance of the market has been just one result.

Competitiveness in the fundraising arena can be overwhelming for some charities.

This coupled with the decline in revenue from direct marketing, changing demographics, and the number of giving channels available to donors has resulted in the need for re-assessment of approach and activities in many charities.

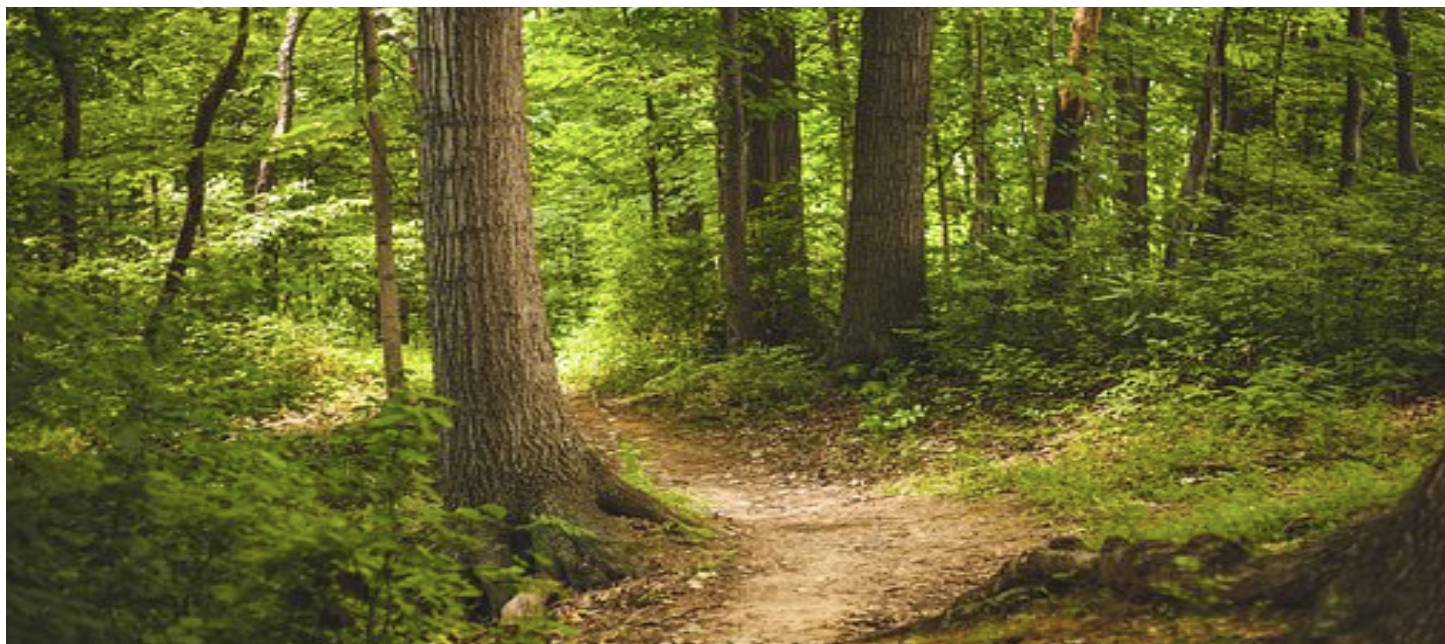
At the same time, the “cheque book activism” that’s been successful in the past is being set aside in favour of a model that engages the donor/activist in the pursuit of policy objectives or systemic change as well as raising money.

Neither the donor nor fundraising itself exists in a universe separate from the mission. It becomes integrated with it strategically. Because new generations of direct marketing donors and progressive major gift donors have declared it is time “to fix this thing.”

That’s why we have formed The Charity Impact Group.

Because—whatever your issue—it’s time to “fix this thing.”

The Mission of The Charity Impact Group



Within the complexity of a changing environment, our job is to help charities succeed on their mission, align philanthropic programs to mission goals, optimize structure and talent, and design a road map for the future. Here's how.

1. Carve a successful path through the increasingly complex charity environment

Before you can see the path towards your charity becoming the dynamic organization you know it can be, there are many questions to be asked. What are you in business to do? Do you know where you fit in terms of others doing similar work—in your city, province, country or around the world? How long have you been doing what you've been doing? What are the results? What do you expect your results will be 10 years from now? What do you *want* your results to be 10 years from now? The Charity Impact Group works through these questions with you and—through consultation, research and assessment—provides you with an impact strategy and tactical options to improve impact. And they will help guide the implementation for as long as you need.

2. Develop a path for you to better align your organization's activities with its strategic goals

Does it sometimes seem that your organization is "running itself," and that its activities—either because of available funding, structural considerations or some other reason—are not moving the mission along? Could your 2007 annual report be swapped out for your 2017 annual report and no one would know the difference? The Charity Impact Group helps charities develop an impact strategy that uses available resources to focus on mission, activities that support the mission and broaden your effectiveness, so you can see and document the progress on your issue year after year.

3. Analyze structure and talent with the view to maximize delivery on mission

So many charities are still operating under the same structure that has been in place for 30, 40, 50 or even 75 years. Meanwhile, the world around charities has moved on. There was the challenge to the assembly line in the 1980s, the “quality circles” of the 1990s, the technological revolution of the 2000s, a revolution that has given rise to work from home, contract work, self-



employment and a host of other changes. The changes have echoed in the charity sector—changes in the role of volunteers, how charities are funded, and the expectation of results. And for some charities, their structure has become an obstacle to progress. They ask themselves if the framework of the organization is suitable for existing and future challenges. Is the talent pool filled with the right talent?

The Charity Impact Group looks at how a charity is structured—whether it be multi-level, federated or stand-alone—and considers the question of whether the structure is helping or hurting the achievement of mission goals. And through a process of review that includes consultation, research and observation, makes recommendations on changes in structure and talent.

4. Situate your organization in a way that ensures you can influence public opinion and public policy



Given their immense insight into the plight of the poor, the sick and the oppressed, charities have a magnificent opportunity to give a voice the people they serve and use their experience to inform public policy. The Charity Impact Group will help you consolidate the information you have on your issue, contextualize it in the current social environment and show you how to improve impact in your area of expertise without significant additional resources. This becoming increasingly important as we try to

identify a cohesive response to people who are mentally ill, falling into poverty, the needs of children in the child welfare system or aging without the support structures they need.

5. Conduct a comprehensive fundraising program assessment

Because some charities rely heavily on fundraising and members of The Charity Impact Group has spent decades working with charities, we understand how vitally important this area of operation is. Every organization has a range of fundraising technique it uses—direct marketing, face-to-face, events, major gift giving and so



on. This work here is to look at the fundraising channels in use by your charity, assess their overall impact and look for best practice and strategic alignment. Back end processing and donor service is also included under this best practice umbrella. We want to come away with additional or improved technique to increase the power to achieve strategic goals. We look at benchmarks of

effectiveness such as the amount of revenue the fundraising department injects into the overall programming of your charity—short and long term (considering ROI, costs and margins) and the aspects of fundraising that can be value-added, and provide you with a written report and recommendations.

6. Offer bespoke research



The Charity Impact Group can be a source of empirically based and comprehensive information on the charitable sector and will harness the knowledge of people who have been working in the charitable sector for decades to answer the important questions you need answered in order to proceed on a decision with knowledge and certainty. The most comprehensive research project involves *highly individualized research* that requires top research talent gathering information that has never

before been assessed. Mid-range research involves sector sub-sets research—health, social services, environmental, international development, humanitarian aid, for example. For corporations, charitable foundations, media or specific ministries of government, it is useful to understand the nature of the work being done in these sub-sectors, gaps, strengths, and potential areas for investment or de-implementation. More basic projects will involve reports that are derived from publicly available data from governments and tax agencies (CRA or IRS, for example) that will give stakeholders, public and private or the media, information they can use to analyze the sector and develop public policy from an empirically based foundation. Research could also be conducted into what your donors, supporters and stakeholders think.

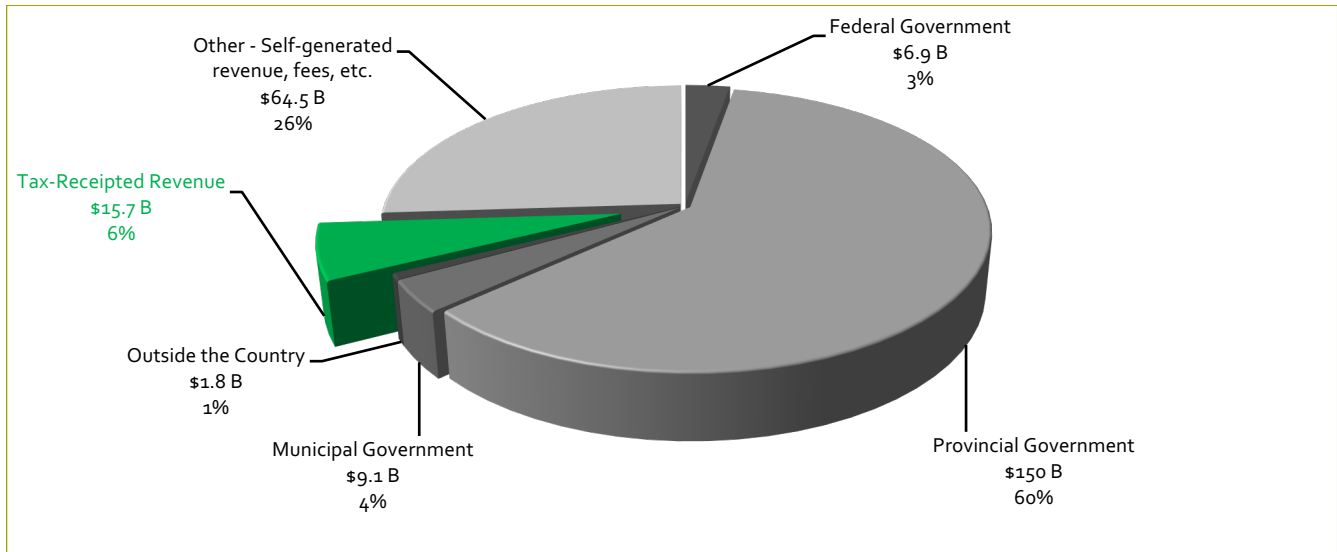
The Charity Impact Group

The Charity Impact Group is led by Gail Picco, an award-winning charity strategist and thought-leader widely recognized as one of Canada's foremost experts on how to carve a path through the increasingly complex dynamics of the charitable sector. The team is made up of charity specialists who understand the philanthropic, public policy, structural, human resource and financial aspects of the charity sector and the organizations within it. They have decades of experience in the charity and public sectors and dealt with a range of stubborn and immediate issues in multi-level, regional and national groups with staff-driven organizations and groups that use large volunteer forces.

The Charity Impact Group is supported by top-notch research and engagement specialists who have decades of experience in qualitative and quantitative research studies, evaluations, focus groups, specialized fundraising and media.

It is a unique collection of talent that is concerned about results today but are working to help you build the charities of the future—dynamic, responsive and effective.

It's not *always* about money



In 2014, the revenue charities generated by all sources equaled \$246 billion. Of that revenue, 6% (\$15.7 billion) was tax-receipted fundraising. A further 1% (\$2.5 billion) was generated by non-tax receipted fundraising. Yet as a sector, philanthropy frequently leads any discussion of resources. Fundraising departments are being asked to raise more money per donor, bring in more donors, increase the average gift per donor and keep all donors happy.

Clearly, proper fundraising practice plays a vital role in a charity's success. And we believe we can help people be more effective in that area.

But in an environment where fundraising is increasingly stressed to provide revenue, wealthy charities are outspending other national charitable brands by as much as four to one in fundraising costs, we have to look beyond philanthropy to be able to realize the charitable mission. That means looking at mission focus, structure, productivity and effectiveness on the expenditure side. But it also means positioning your charity to take advantage of the revenue that exists in 92% of the charity revenue pie. That will typically involve staking out a position on public policy, looking at long term solutions and engagement of supporters on mission.

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