



# APPLEGROVE COMMUNITY COMPLEX

60 Woodfield Road, Toronto, Ontario M4L 2W6

Tel: 416-461-8143 Fax: 416-461-5513

www.ApplegroveCC.ca

**“TOGETHER, BUILDING OUR COMMUNITY”**

## **Board of Directors Meeting AGENDA – Wednesday, April 9, 2009**

**If you cannot attend, please call the office with your regrets**

A neighbourhood partnership fostering community  
through social and informative programs for individuals and families.

Note: There is no committee meeting this month.

**6:00 Optional Supper**

**6:15 Orientation for new Board members** (experienced Board members are welcome!)

**7:00**

1. Welcome/Call to Order/Adoption of Agenda
2. Declaration of Conflicts of Interest
3. Volunteer Hours
4. Donation Envelope

**7:05**

5. Minutes of the March 4 Board of Directors Meeting (*White*)
6. Business Arising from the Minutes (not elsewhere on the agenda)
7. Strategic Planning (*Grey “Issues”, white report*): for information, amendment and adoption

**8:00**

8. Officer and Committee Selection (*Yellow*): for decisions
9. Birthday Planning
  - 9.1. Beaches Lions Easter Parade: information
  - 9.2. Apple Recipe Book: update
  - 9.3. “Twinning” with Applegrove Primary School (northwest of Aberdeen, Scotland)
  - 9.4. “Twinning” with Apple Grove Elementary School (south of Washington, DC)
  - 9.5. Neighbours Night Out: Tuesday, June 16

**8:15**

10. Finance and Fundraising
  - 10.1. Draft 2008 Audited Report (*Green*): for information
  - 10.2. Year-to-Date (February) Monthly Financial Report (*to be circulated at the meeting*): for information
  - 10.3. Admin Budget Update: for information

**8:25**

- 10.4. Fundraising: SPA (*Orange*): for information and action

**8:35**

11. Directors' Concerns
12. Adjournment



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## **Board of Management Meeting AGENDA -- Wednesday, April 22, 2009**

**8:40**

- A. Call to Order/Adoption of Agenda
- B. Declaration of Conflicts of Interest
- C. Minutes of March 4 Board of Management Meeting (*White*)

Motion needed to discuss the next item *in camera* (without guests or staff other than the Executive Director and Program Director), as it deals with identifiable individuals or confidential information.

- D. Collective Agreements: for information

Motion needed to return to the public meeting.

**8:50**

- E. Executive Director's Report (*Pink*)

**8:55**

- F. Correspondence/Information (*Cream*)
  - F.1. Correspondence List
  - F.2. 10 Tips: for information
  - F.3. Challenges and Opportunities: for information

**8:59**

- G. Adjournment

### **Next Meetings**

Tuesday, May 12 – SPA Night!

Wednesday, May 20 – Board meetings



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## **Minutes of the Board of Directors Meeting Wednesday, March 4, 2009**

A neighbourhood partnership fostering community  
through social and informative programs for individuals and families.

Present: Estelle Halbach (Chair), Elena Nielsen, Tricia Reid, Pierre Trudel, Lynn Wyminga  
Regrets: Sandra Bussin, Donald Yuen.  
Guest: Alana Honsch  
Staff: Susan Fletcher, May Seto (Recorder).

### **Date of Next Meetings**

Wednesday, March 25 – Annual Meeting

Monday, April 6 – SPA Planning Meeting

Wednesday, April 22 – Board meetings

### **1. Call to Order/Adoption of Agenda/Introductions**

At 7:00, Estelle called the meeting to order. Quorum of 5 Directors was achieved. The agenda was accepted as circulated.

### **2. Declaration of Conflicts of Interest**

None were declared.

### **3. Volunteer Hours**

Members provided their volunteer hours.

### **4. Donation Envelope**

Donation envelope circulated.

### **5. Minutes of the February 11 Board of Directors Meeting**

**MOTION** (Nielsen/Wyminga)

*To accept the minutes of the February 11 Board of Directors Meeting.*

**Carried.**

### **6. Business arising from the Minutes**

None

### **7. Strategic Planning**

Susan provided a series of tables summarizing and consolidating the priorities and suggesting action steps. The Board reviewed and discussed the areas that had the highest ratings. The next steps include circulation to staff and participants with comments returned for discussion at the April Board meeting.

## 8. Board Recruitment

Susan introduced a new nomination form that includes questions to track diversity issues (from the City's diversity questionnaire). The Board reviewed the new form and agreed it was a good idea to use. Members who were present completed it.

Several individuals have indicated interest to be on the Board. Susan has provided information and has invited them to the Annual General Meeting.

Susan posted our vacancy on the Maytree's DiverseCity (previously ABC/GTA) and on the City's website.

## 9. Birthday Planning

### 9.1 Beaches Lions Easter Parade

Pierre provided an overview of his idea for the Beaches Lions Easter Parade. A small committee of Board Members will meet in the following week to firm up plans. It was suggested to do an adult "bunny ears" craft at the Family Resource Programs so marchers can wear for the parade. It was also agreed to distribute apples with Applegrove info on labels at the parade. Several wagons will be needed to hold bags of apples.

### 9.2 Apple Recipe Book

Susan showed Board Members a previous Apple recipe book that was printed in 2004. Board members suggested some updates and will include additional recipes to be ready by May 1st for the SPA and Neighbours Night Out. Lynn will speak to a family member about ideas for design.

### 9.3 "Twinning" with Applegrove Primary School (northwest of Aberdeen, Scotland)

### 9.4 "Twinning" with Apple Grove Elementary School (south of Washington, DC)

Susan has made contact via email with the school in Scotland and will be initiating pen pals with our Afterschool Program. She is still trying to contact the school in Washington.

### 9.5 Neighbours Night Out

It was decided that we would serve birthday cake at Neighbours Night Out to celebrate with the community.

## 10 Finance and Fundraising

### 10.1 2009 Year-end Financial Report

The Board reviewed the Year-end figures and Susan answered any questions that Board Members had.

#### **MOTION** (Reid/Nielsen)

*To transfer \$4634 of Summer Camp operating surplus to Fundraising.*

**Carried.**

#### **MOTION** (Wyminga/Nielsen)

*To transfer \$2120 from Fundraising to partially cover the Edgewood deficit.*

**Carried.**

Board of Directors Minutes

March 4, 2009

3

**MOTION** (Reid/Trudel)

To transfer \$9026 from Fundraising to partially cover the Parent/Child deficit.

**Carried.**

**MOTION** (Reid/Trudel)

To implement March Break Programs with current registration of 10 participants.

**Carried.**

10.2 Admin Budget Update  
Nothing to report.

10.3 Fundraising  
Will provide updates at next Board Meeting

**11 Directors' Concerns**

None

**12 Adjournment**

The meeting was adjourned on a motion by Elena Nielsen, seconded by Pierre Trudel.

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Chair

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Secretary



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## **Minutes of the Board of Management Meeting March 4, 2009**

A neighbourhood partnership fostering community through social and informative programs for individuals and families.

Present: Estelle Halbach (Chair), Elena Nielsen, Tricia Reid, Pierre Trudel, Lynn Wyminga  
Regrets: Sandra Bussin, Sheila Cary-Meagher, Donald Yuen.  
Guests: Alana Honsch  
Staff: Susan Fletcher, May Seto (Recorder).

### **A. Call to Order/Adoption of Agenda**

As Chairperson, Estelle called the meeting to order. Quorum of 5 members was achieved. The agenda was adopted as circulated.

### **B. Declaration of Conflicts of Interest**

No conflicts of interest were declared.

### **C. Minutes of the February 11 Board of Management Meeting**

**MOTION** (Trudel/Reid)

To accept the minutes of the February 11 Board of Management Meeting.

**Carried.**

### **D. Collective Agreement: for information**

Deferred to next Board Meeting.

### **E. Executive Director's Report**

**MOTION** (Wyminga/Nielsen)

To accept the Executive Director's Report.

**Carried.**

### **F. Correspondence/Information**

Susan highlighted correspondence/information.

**MOTION** (Reid/Nielsen)

To accept the suggested actions in the Correspondence List.

**Carried.**

### **G. Adjournment**

The meeting was adjourned on a motion by Lynn Wyminga, seconded by Pierre Trudel.

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Chair

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Secretary

**Charitable Number: 10671 8943 RR0001**



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## **Executive Director's Report**

April 9, 2009

My last report was dated February 23, which means it has been 6 weeks already. I am writing this report a little early because I will be away next week, but it does not seem like so long ago that I wrote the last one.

Many of you have been busy with some of the same issues I have been working on. First among these is the Annual Meeting. With thanks as usual to Louise for the food and S.H. Armstrong for the facility, our AGM was both efficient and involving. We have developed a style for the AGM that means we accomplish the required business while celebrating accomplishments.

SPA Night has kept the committee and me very busy. You probably received a mailing before Easter that included a SPA Night poster – of course, that was the black-and-white on pink version. The official version, in colour, is even more chic and elegant. Big thanks go to volunteer designer Janet New. She was creative and gracious and timely in coping with our changing requests!

The SPA Night Committee members have worked hard recruiting practitioners. With about 45 practitioners, some of whom can take more than one client at a time, we can accept about 60 clients.

I have put a lot of time into Collective Bargaining, and this is likely to continue until at least the end of July.

Your Board package includes a new draft of the Strategic Planning Report and an outline of issues to consider. Councillor Bussin met with Elena, Diane, May and myself today to make some suggestions and offer support.

You will note on the Board agenda that instead of a committee meeting, there will be an orientation session for new Board members. Experienced Board members will be very welcome to provide their perspectives.

The April meeting is also the annual time to select officers. The maximum term in any position is 2 years, meaning that Estelle must resign as Chairperson. The *orange* document in your package outlines the responsibilities of the 4 officers. Board members should also decide which committees they will work on. We need a Personnel Committee and an Applicative Planning committee as well as the SPA Planning Committee. Although in the past Applegrove had a People and Programs Committee and a Finance and Fundraising Committee, these functions have been incorporated into Board meetings.

The 2010 SPA Planning Committee will probably meet once in the fall and monthly from January to June. The Personnel Committee usually meets twice in the fall, but may need additional time. The Applicative Planning Committee needs to have an initial meeting ASAP and set meetings every 2 or 3 weeks until early October.

For the May Board meeting, May and I suggest using the 6 to 7 p.m. period for a volunteer recognition dinner upstairs in the Lounge and Hub, then carrying on with the Board meeting in the Archive Room (child care in PC). If so, there will not be time for a program presentation which we try to do every other month.

Let me also fill you in on some of my out-of-Applegrove work. I chair the SPACE Coalition (Saving Public Access to Community space Everywhere) and co-chair the Toronto District School Board's Community Use of Schools Advisory Committee (TDSB CUSAC) to keep use of school space affordable. (Applegrove's regular space including the Parent/Child room, Lounge and office, is leased; "community use" space is by permit and includes the gym on Tuesday evenings for our teens, the gym on Friday afternoons for the after-school program, and classrooms, gym and cafeteria for our summer day camp and leadership.)

A major focus has been the Focus On Youth summer program. This provincial program provides funding to the TDSB to offer free space to community groups for summer programming and also pay TDSB students to work in those programs. Last summer, this in-kind support was valued at over \$15,000 for Applegrove. As I am writing on the Thursday before Easter, the province has not yet announced FOY for this summer. I hope for positive news before the Board meeting.

Please note that while I am away from April 10 to 20 inclusive, I will not be checking my e-mail [susan@applegrovecc.ca](mailto:susan@applegrovecc.ca). Franki will monitor it and respond to urgent issues. May will monitor the regular Applegrove e-mail [applegrove@ApplegroveCC.ca](mailto:applegrove@ApplegroveCC.ca).

Respectfully submitted,

Susan Fletcher.



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## SPA Planning Meeting Notes

April 6, 2009

**Present:** Estelle Halbach (Chair), Diane Ing, Elena Nielsen, Tricia Reid, Pierre Trudel, Lynn Wyminga, May Seto, Susan Fletcher (recorder)

### 1. Next meetings

Last planning meeting: May 4 at 7:30

Evaluation meeting: Monday June 1 (location and time to be arranged)

### 2. Notes of March meeting

- accepted by consensus

### 3. Action Items

1. Get business cards from practitioners (Estelle, Tricia, May, Susan, Elena, Diane)
2. Check out [www.acupunctureforpain.ca](http://www.acupunctureforpain.ca) (everyone) - he's offering gift certificates
3. Food mailing and follow-up (May & Louise)
4. Get URLs from practitioners (Susan)
5. Add links to website (Lynn) - up until end of May
6. Put up on Craigslist (Lynn)
7. Beaches Living Guide (May)
8. Press release for local papers (Estelle)
9. Beach Metro News letter to editor (someone has to let Tricia know when to write)
10. Postering 2 weeks before event (Pierre, Lynn-Queen, Diane, Tricia- Kingston)
11. School hand-out, black and white (May)
12. Follow up on bags (Elena)
13. Silent auction follow up (Tricia & Pierre)
14. Bid sheets (list from Tricia, May & Louise will create)

### 4. Update on Practitioners

- 46 confirmed to date
- Elena has one more who can do manicures, eyebrow wax, etc. Elena will confirm which service(s) she will offer and let Susan know.
- Susan will send sample gift certificates to Tricia
- updated follow-up letter and decided which volunteers would get business cards from which practitioner

### 5. Sponsor Update

- Estelle had no news
- Elena reported that last year's food sponsor is no longer in real estate (but might attend as a client)
- members noted that SPA might be too small an event for sponsorship; we will re-contact the sponsor list for Applicious

### 6. Update on Refreshments

- May has identified a number of restaurants from which to make a specific request for food items such as a platter of sushi, salad, etc.

- she has already sent 8 requests and will send another 25 this week
- will ask the baking class to make a tray of goodies.
- as a last resort, we can purchase spring rolls, samosas, etc., and make salads. Will discuss at the May meeting.
- also at May meeting, decide what to do about water.

## 7. Marketing

### a) Materials

- admired the chic and elegant brochures and posters.
- Susan outlined printing challenges and how they were resolved
- about 1000 b/w posters on pink paper were mailed to members on April 6.
- Diane noted that there is a lot of info on the poster and suggested simplifying for future years.

### b) Website

- Lynn designed the site to look like the posters
- agreed to put links to practitioners websites and keep active until end of May
- put up thanks after the event

### c) Electronic media

- Elena reported:
  - the event is up on Facebook
  - Toronto.com – new system makes it very awkward, may not be up before event
- Lynn will put up on Craig's List and will update
- May will put in the Beaches Living guide

### d) Local Newspapers

- Estelle has updated SNAP and will send information to other local papers
- a listing in the Beach Metro community calendar has a small charge for each edition.

### e) Postering in neighbourhood

- target date for local postering is April 28: coffee shops, women's clothing, nails, hair salons, daycares, schools, etc, plus stores targeting men (who may be looking for Mothers' Day gifts)
- Lynn and Pierre: Queen Street from Applegrove as far east as possible
- Tricia and Diane: Kingston Road
- May will follow up on flyers to go home with children in Duke of Connaught and will check with other schools

## 8. Update on Gift Bags

- arranged for volunteers to pick up business cards, etc. from practitioners
- Elena will continue to try to obtain re-usable bags or other bags from her contacts
- if not, Susan/May can purchase cellophane bags and ribbon from the bag store

## 9. Update on Silent Auction

- Susan noted that a practitioner of traditional Chinese medicine had, apparently spontaneously, offered gift certificates for a massage and for an acupuncture facelift worth \$100 each.
- Gift certs, basket of products

- Tricia has all the items promised to her except 2
- Pierre will follow up with Ashdale medical clinic and with his wife (gift cert for an hour of counselling and a CD)
- Tricia will provide list to May; May and Louise will make bid sheets

#### **10. Volunteers/event staff**

- see list of activities for review during the month
- people doing pick-ups should also call their practitioners on the Wed/Thurs of the week before the event(May 6 and 7); Pierre will call any practitioners that others can't
- Louise will call all clients

#### **11. Décor**

- May will try to get flowers donated

#### **12. Next meetings**

Last planning meeting: May 4 at 7:30

Evaluation meeting: Monday June 1

**2009 SPA Timeline** (Revised April 6)  
Meeting dates are bold

December	Discuss sponsorship by e-mail Susan will send prior practitioner letters and info to committee.
Jan 2	Susan will send draft practitioner letters to committee
<b>Jan 5</b>	<b>Planning Meeting</b>
Jan 15	Send letters to prior practitioners
Jan. 21	Divide up practitioner lists among volunteers doing follow up
Jan 22	Begin follow-up calls to practitioners
Jan 30	Send letters to prospective practitioners
<b>February 2</b>	<b>Planning Meeting</b> (focus on marketing materials and practitioners)
Feb 5	Send letters to potential sponsors
Feb. 20	Begin follow-up calls to sponsors
<b>March 2</b>	<b>Planning Meeting</b> (focus on food and marketing materials)
March 16	Deadline for practitioner/sponsor inclusion in brochure (can be delayed to March 20 for individual practitioners)
March 16 (or later)	Web page goes up
March 18	Finalize ticket, poster and brochure design
<del>March 23</del>	<del>Tickets, posters and brochures sent to printer</del>
<b>March 26</b>	<b>Mini-Meeting, 11 a.m. in Parent/Child room on printing options</b>
March 26/27	Send tickets, posters and brochures to printer (April 2/3)
March 30	Tickets, posters and brochures back from printer (April 6/7)
April 1	Begin selling tickets
<b>April 6</b>	<b>Planning Meeting</b> (focus on marketing, food, volunteers)
early April	Mail brochures and posters to practitioners WITH request for gift bag items.
<del>April 20</del>	<del>Volunteers pick up gift bag items from practitioners</del>
<del>Mid April</del>	<del>Train volunteers giving facials</del>
late April	Volunteers distribute posters to stores in neighbourhood
April 30	Plan room assignments
May 1	Deadline for new practitioners
May 1	Deadline to receive Silent Auction Donations
May 4	Begin compiling gift bags
<b>May 4</b>	<b>Planning Meeting</b>
May 5	Design and print client and practitioner evaluation forms
May 6	VIP Ticket cut-off
May 6/7	Reminder calls to practitioners
May 8 to 11	Compile client and practitioner welcome packages
May 11	Reminder / confirmation calls to clients
May 12	Event
May 20	Thank volunteers, practitioners and clients Compile practitioner and client evaluations
<b>June 2</b>	<b>Evaluation Meeting: time and location to be decided</b>

## Volunteer/Staff Jobs 2009

- I. Preparation
  - a) April 8: Send follow-up letters to confirmed practitioners about gift bags, etc. (Susan)
  - b) Date to be determined. Pick up practitioners' gift bag materials and provide additional posters/brochures
  - c) April 29: make and display outdoor sign, e.g. sandwich board with 2 ledger size posters.
  - d) April 29: bring gift bag materials to EW (Susan/May)
  - e) May 1: last day to accept new practitioners. Generate listing to put into gift bags. (Susan)
  - f) May 4/5: move Applegrove's "white tables" to EW (May/Susan)
  - g) May 4, 5, 6: clean rooms / move unneeded furniture and equipment / check condition of all washrooms (Louise) May 5:
  - h) May 4: final preparation meeting at 7:30 p.m.
  - i) May 4: begin compiling gift bags (Susan/Louise/volunteers)
  - j) May 6-7: call practitioners, check on details. If their appointment cards are full, let them know! – (Tricia, Estelle, Elena, etc.)
  - k) May 8 and 11: prepare listing of practitioners/services and practitioners/rooms, copy appointment cards and waivers, make signs, etc. (Susan)
  - l) May 11: prepare 2 sets of sign-up sheets for wall, including transferring VIP client appointments to them (Susan/Louise/May)
  - m) May 11-12: compile client packages including evaluation form and putting name on release forms and appointment cards, call clients to confirm and remind to bring yoga mat (Louise). Also make numbers to give out AND tracking system
  - n) May 8-11: compile practitioner packages including list, map and evaluation form. Make at least 50% more than the number of practitioners to ensure each practitioner welcome volunteer has enough
  
- II. Set up
  - a) Set up rooms: during the afternoon, ensure that each room including gym has the necessary chairs, flowers, equipment, etc. (3 people)
  
  - b) Post signs: during the morning or afternoon, post signs around the building and sign-up sheets on south wall of gym (2 people)
  
  - c) From 4:45 to 5:45, at the parking lot entrance, welcome practitioners and tell them which room they will be in, direct them through the main doors or into the gym, and direct clients into the Edgewood room. (2 people)
  
  - d) Practitioner Welcome: from 4:45 to 5:30 (Estelle? and Susan)
    - one person inside main doors, one at gym entrance
    - practitioners will receive info package with map, listing of practitioners and rooms, evaluation form
    - invite them to the practitioners' lounge at 5:45 for a welcome and supper
    - check off practitioners as they arrive
    - at 5:25, coordinate lists to determine who has not arrived.
  
  - e) Help practitioners set up: one person in gym, one on second floor, at least 2 runners, each with cell phone. (4 people total)
  
- III. Food (4 people)
  - a) Pick-up: (2 people) 10 a.m. to 3 p.m.
  - b) Preparation: (depends on food received)
  - c) Starting at 5 p.m., put out food in Edgewood room, replenish trays as needed, make tea and coffee.

- d) Starting at 5 p.m., put out food in Practitioners' Lounge. (one person monitors)
  - e) Check second floor station before breaks at 7:00, 7:30, 8 and 8:30 (one person)
  - f) Starting at 9:15 p.m., clean up food.
- IV. Welcome and Client Registration: beginning at 5 p.m., Louise and May will welcome clients, including having them sign a release and giving out info packages.
- all clients will get a map, evaluation form and release
  - VIP clients will get their confirmed appointments
  - regular clients will get listing of services available and their number (for sign-up first-come, first-served)
  - waiting area (near coat hooks will be lined with chairs and snacks to make any wait time more relaxing)
  - VIP clients will stay in EW room until 6:10
  - regular clients will stay in EW room until called by number for sign-up
- V. Appointment Sign-up: from 5:30 to 6:15
- a) sign clients up for 4 individual appointments, practitioners for 5 clients.
    - 4 people
    - everyone needs their cell phone with them
    - when they finish with a client, phone Welcome Table to ask for the next number.
    - ask clients what they want; put client's name on wall list, write practitioner, service and room on client's appointment card.
    - encourage clients to get a student massage unless they do not want any massage. If they don't want any massage, they can still have 4 other services.
  - b) at 6:15 or when all clients scheduled, copy info from large sheets on second set, and post second set outside appropriate room. Also copy from large sheets onto practitioner appointment cards.
- VI. MC (5:45 to 6:30): Speech to clients, speech to practitioners (Estelle?)
- VII. Media Contact: from 6 to 9 (Estelle?)
- VIII. Ultimate Problem Resolution (Susan)
- IX. Silent Auction: arrange items and bid sheets, supervise bidding, collect sheets at end of auction and total them. Bring sheets and items to Goodbye table to notify successful bidders and if possible, collect money and distribute items. (Tricia with a helper at 8:40)
- X. Evaluation and Gift Bags: from 8 to 9:45, set-up goodbye area in EW room in front of coat hooks, collect evaluation forms from practitioners, collect evaluation forms from clients, give out gift bags (Louise). Also, at 8:45 Estelle and ?? will remind practitioners to complete their evaluation forms and bring them to the EW room.
- XI. Clean up: from 9:05 to 9:45 (Welcome Team)
- help practitioners carry their equipment to their cars. Remind them to complete evaluation form and take it to EW room to receive a gift bag (and help improve the event)
  - bring loaned plants and boom boxes to one place

Clean up #2: starting at 10 a.m. on Wednesday, May 13, empty and discard water bottles, take down signs, move furniture as needed



THE 6TH ANNUAL  
**SPA NIGHT**

TUESDAY, MAY 12, 2009

5:30 P.M. TO 9:30 P.M.

42 EDGEWOOD AVE. AT CORPUS CHRISTI SCHOOL

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*Enjoy this exceptional evening of relaxation and fun while raising money to support Applegrove's work with young children and families. Bring your friends! Professional practitioners from the Beach area will take care of you with manicures, haircuts, massage, make up and much more!*

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**BUY YOUR TICKET NOW**

ONLY A LIMITED NUMBER OF TICKETS ARE SOLD!

CALL 416-461-8143

YOU CAN PAY BY CASH, CHEQUE, VISA OR MASTERCARD.

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For 30 years, Applegrove has provided a range of services to support children and families. These include:

- 3 free family resource programs | pre- and post-natal nutrition |
- after-school programs | teen evening programs |
- summer programs for children and teens | and much more.

Proceeds from this event will support early development activities for children.

[WWW.APPLEGROVECC.CA/SPA](http://WWW.APPLEGROVECC.CA/SPA)



TWO VERY SPECIAL SPA PACKAGES TO CHOOSE FROM:

**VIP TICKETS: \$80**

Register for 4 individual treatments and classes in advance. Guarantee your choices and relaxation.

VIP SPECIAL: Buy two tickets and get a \$10 discount.

**REGULAR TICKETS: \$50**

Enjoy 2 classes and 4 individual treatments. Choose your treatments on SPA night when you check in. First come, first served basis.

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**FOR EVERYBODY:**

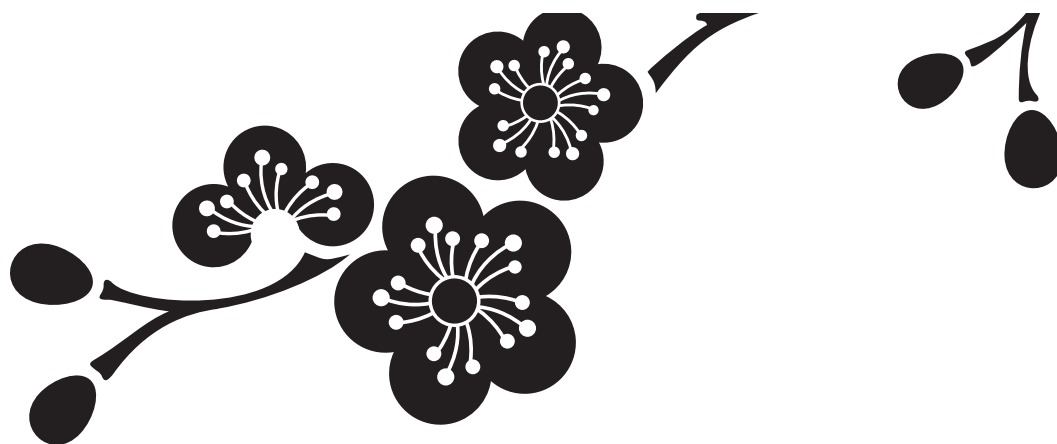
Complimentary access to THE CAFÉ where you can enjoy a delightful array of healthy nibbles and beverages.

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A FUNDRAISING EVENT ORGANIZED BY AND FOR



APPLEGROVE COMMUNITY COMPLEX  
"TOGETHER, BUILDING OUR COMMUNITY"



**Applicious Planning Committee  
Draft Agenda for First Meeting in 2009**

1. Welcome and Introductions
2. Proposal (for reference)
3. Confirm or Amend Last Year's Purpose, Objectives and Evaluation
  - A. Purpose

Members confirmed the purposes as described in the proposal:

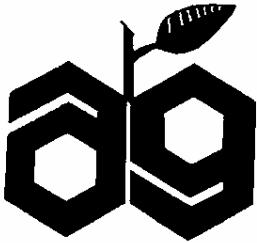
    - fun and interaction for neighbourhood residents
    - offer partnership and fundraising opportunities to local services and organizations
    - promotion of local businesses/services/organizations
    - market Applegrove and support programs
  - B. Objectives
    - target number of participants = 600
    - target money raised = break-even was first year goal
    - 5 publicity mentions on the day of and after event (TV, local newspapers, etc.)
    - 75% satisfaction rating (see below).
  - C. Evaluation

To assess how effectively the event fulfills its purposes, members suggested collecting contact e-mail or phone numbers for a follow-up survey with a prize drawn from all those who give contact info, and a better prize drawn from among responses. The questions would be based on the following (some open ended, some rating, and some multiple choice):

    - a) The best thing about Applicious was . . .
    - b) Applicious would be better if . . .
    - c) Overall rating for the event on a 4 point, fixed choice scale
    - d) Before the event, had you heard of Applegrove?
    - e) How did you hear about the event?
4. Workplan

January/February	Applegrove's Board develops the concept, set date/location and endorse proposal for City grant.
March, April and May	recruit partners for the festival. Begin planning committee
mid-May	hire planner
end of May or later	City recommendation regarding grant
June to September	planning, recruiting sponsors, designing materials, etc.
September	advertise
September 19	event
end of Oct	planner finishes contract (clean-up, thanks, final report)
5. Planning Committee
  - what additional skills/connections do we need on the planning committee?
  - what businesses/organizations should be involved?
  - set regular meeting date/time

6. Partners and Sponsors
  - A. Difference
  - B. Who
  - C. How and when to contact
7. Sports Activities/Personalities
8. Rain Plan
9. Other Issues
10. Next Steps and Next Meeting



# APPLEGROVE COMMUNITY COMPLEX

60 Woodfield Road, Toronto, Ontario M4L 2W6

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[www.ApplegroveCC.ca](http://www.ApplegroveCC.ca)

**“TOGETHER, BUILDING OUR COMMUNITY”**



## **Applegrove Current Mission**

A neighbourhood partnership fostering community through social and informative programs for individuals and families.

Adopted November, 1995.

## **Applegrove Original Mission Statement**

Applegrove is a community centre that focuses on providing social programs based on the needs of the individual, groups and the community.

Applegrove is a community resource centre with flexible programming in an informal environment.

Applegrove is a partnership of users and staff that provides support to its users and fosters community identity and development.

Adopted November, 1988.

## Duties of Officers and Committees

-- 2 --

The following sections are from the Procedural By-law(s), but have been re-numbered.

### 1. Officers of the Board

- 1.1. The Board will elect its officers and Committee Chairpersons at its first meeting following the Annual Meeting.
- 1.2. The officers of the Board will be: Chairperson, Vice-Chairperson, Treasurer and Secretary.
- 1.3. The Board may establish other offices and positions as it deems necessary, and will prescribe the powers and duties of such officers.
- 1.4. The term for every officer will be no more than two years.
- 1.5. No member of the Board may hold more than one office at any time.
- 1.6. A Director may progress through the various offices.
- 1.7. Vacancy in an office position will be declared upon:
  - i) the death of an officer;
  - ii) the resignation of an officer;
  - iii) the removal of an officer; or
  - iv) an officer ceasing to be a Director.
- 1.8. The Board may appoint any other Director, except as provided for above, to fill a vacant office, and the Director so appointed will hold office for the balance of the term of the previous officer.
- 1.9. In the event of the absence of an officer, the Board may delegate the powers and duties of such officer to any other member of the Board until the return to duty of the incumbent officer.
- 1.10. The Board may remove any person from an office at any time by a motion passed by a majority vote of the Board. Appeal may be made to the membership as a whole.
- 1.11. Duties of Officers
  - i) The Chairperson will:
    - preside, when present, at all Annual, Special and Board Meetings;
    - perform all the duties accompanying the office and any other duties assigned by the Board;
    - rule on procedural matters and ensure motions and minutes are clearly expressed;
    - be an ex-officio member of all committees; and
    - serve as a signing officer.
  - ii) The Vice-Chairperson will:
    - assist the Chairperson;
    - have such other powers as are assigned to the Vice-Chairperson from time to time by the Board;

## Duties of Officers and Committees

-- 3 --

- if the Chairperson is absent, act as Chairperson until the Chairperson returns to duty; and
  - if there is a vacancy in the office of Chairperson, serve as Chairperson for the balance of the term of person whose departure created the vacancy.
- iii) While acting as chair, the Vice-Chairperson will have all the powers and perform all the duties of the Chairperson except being a signing officer.
- iv) The Treasurer will:
- have such powers and perform such duties as are usually vested in the office of Treasurer;
  - receive, examine and present to the Board, Applegrove's financial statements and budgets;
  - make recommendations to the Board concerning all aspects of Applegrove's financing and administration;
  - have such other powers as are assigned to the Treasurer from time to time by the Board; and
  - serve as a signing officer.
- v) The Secretary will:
- issue or cause to be issued notices for all meetings of the membership and the Board when directed or required to do so;
  - ensure that the minutes of all meetings of the membership and the Board are kept;
  - ensure minutes are provided at subsequent meetings of the board for review and adoption;
  - have such other powers as are assigned to the Secretary from time to time by the Board;
  - have responsibility for the membership records; and
  - serve as a signing officer.
- vi) All officers, at the time they leave office, will turn all the papers and documents of the office over to the incoming officer.

## 2. Committees

- 2.1. The Board will determine any committees needed and will prescribe the powers and duties of such committees.
- 2.2. Composition and Membership
- i) All Committees will be headed by a Chairperson chosen from among Board Members and appointed by the Board.
  - ii) All Committees should be composed of at least two Board Members and other Applegrove members and staff who are appointed by the Board.

## Duties of Officers and Committees

-- 4 --

- iii) Both the Executive Director and the Chairperson are *ex officio*<sup>1</sup> members of all committees except as otherwise specified in the Committee's Terms of Reference.
- iv) All Committees will:
  - a) operate within the terms of reference laid down by the Board;
  - b) provide an open forum for discussion by all interested parties;
  - c) report their deliberations, recommendations and resolutions to the Board for confirmation and for approval; and
  - d) continue to operate for such length of time as will be determined by the Board.

### 2.3. Meetings of Committees

- i) Normally, Committees of the Board will hold their meetings on the premises of Applegrove at such time as the Chairperson may determine.
- ii) Notice of every Committee meeting will be provided to members of the Committee prior to the date. This notice may be either oral or written, and is not necessary when that Committee sets a regular meeting date.
- iii) Meetings of every Committee will be open to all members, except where confidential business is being conducted.
- iv) No quorum is usually required for a Committee to meet. However, minutes of Committee meetings must specify who was in attendance so that the Board may know to what degree the Committee's recommendations reflect the will of the Committee's membership.

### 2.4. Voting

At all Committee meetings, only the members of the committee present will have a right to vote.

### 2.5. Executive Committee

There will be no Executive Committee.

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<sup>1</sup> "*Ex officio*" means "by their office" but does not prescribe whether they can vote or not. Therefore, the Chair is a member of all committees but does not necessarily attend all meetings. If the Chair attends, she/he can vote.

## Duties of Officers and Committees

-- 5 --

### Terms of Reference Personnel Committee

Draft revision September 2000 to reflect unionization and Board decisions  
Revised November 2005

#### 1. Composition

- 1.1 The Personnel Committee includes the Treasurer and at least 1 other member of the Board, one ~~staff~~ **representative of the unionized staff** (Nov. 23, 2005) **and a management staff representative** (Sept. 28, 2000) plus the Board Chairperson *ex officio*.
- 1.2 The Executive Director staffs the committee, but is not a voting member.
- ~~1.3 The Program Director attends meetings as a resource, but is not a member. (Sept. 28, 2000)~~
- 1.4 **A representative of the non-union staff can attend meetings as a member.** (Nov. 23, 2005)

#### 2. Chairperson

- 2.1 The committee will select a chairperson from among its members.
- 2.2 The chairperson must be a Board member.

#### 3. Responsibilities

- 3.1 To ensure that appropriate personnel policies are developed, followed, and revised as required.
- 3.2 To ensure equal opportunity employer/employee standards in all aspects of agency employment.
- 3.3 To participate in hiring of core administrative staff.
- 3.4 To make recommendations on personnel issues to the Board for approval.
- 3.5 **To act as the Labour Management Committee as appropriate.** (Sept. 28, 2000)

#### 4. Procedures

- 4.1 The committee should set a regular meeting date convenient to its members.
- 4.2 Because issues of a sensitive and/or confidential nature may be discussed, only members of the committee should attend meetings. However, other interested parties from the Board, staff or users are welcome to contact the chair of the committee to request permission to attend.
- 4.3 Minutes of committee meetings, draft policies and drafts of other organizational documents (such as terms of reference) will be circulated with the monthly Board package.

## Duties of Officers and Committees

-- 6 --

- 4.4 Hiring reports and other information concerning current and potential staff will be considered confidential within the committee.
- 4.5 **The staff rep(s) and/or the management staff rep and/or Executive Director may be excluded from discussions on certain issues.** (Sept. 28, 2000)

## Duties of Officers and Committees

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## Strategic Planning – Issues for April Board Meeting

April 9, 2009

1. This version of the report consolidates the priority items from the table and puts them in a different order. Funding has been moved up significantly; without additional funding, Applegrove cannot maintain the current services much less expand them.
2. Councillor Bussin supports Applegrove's need to strengthen its presence in the community and recommended that Applegrove develop means to respond to emergencies such as the apartment fire earlier this year. She also suggested a Christmas food drive similar to that of Community Centre 55. She says that this would be a good way of both meeting local needs and becoming better known in the neighbourhood. For more information about Centre 55's event, check [http://www.centre55.com/programs\\_sac.htm](http://www.centre55.com/programs_sac.htm)

Councillor Bussin also suggested adding visibility via the ScotiaBank Marathon on Sunday, September 27. See <http://www.torontowaterfrontmarathon.com> and attached charity application for more information. If the Board agrees to participate, perhaps Applegrove should also consider consolidating Applicious with the Beaches BIA festival in September in Woodbine Park.

3. The action items in the table included taking time at the May Board meeting to consider funding and demonstrating the impact of Applegrove's services, including agency re-structuring. Such restructuring could include:
  - a) starting with the simple step of re-naming our category of services for families and young children to "Early Development and Support Services". This will help with the recognition that our family resource programs' primary function is enhancing children's development; these are not simply "stay and play" or "moms and tots" sessions.
  - b) considering whether the current staffing models for PC, EW and HAIG provide effective and appropriate capacity, given current program usage (both the numbers of participants and their demographic characteristics). If the Board wishes to consider changing staffing models, relevant staff should attend the May meeting to help in understanding usage.
  - c) changing the catchment area. When Applegrove considered this issue in 1991, we felt we were not adequately serving all of the existing catchment area. Since then
    - o Edgewood received permanent funding
    - o Helping Our Babies Grow was initiated and serves an area from Greenwood to Victoria Park, Lake Ontario to Danforth
    - o The HAIG opened near Coxwell and Danforth.
    - consider changing the current northern boundary from the railway tracks north of Gerrard to Danforth?
    - would not recommend changing the eastern boundary (Woodbine) because Community Centre 55's catchment area is from Victoria Park to Coxwell.

**Charitable Number: 10671 8943 RR0001**

- advantages:
  - increasing the number of members living in the catchment area (currently, a high proportion of HAIG and HOBG participants are associate members who live outside the catchment area)
  - more accurately reflecting service area
  - allowing a greater geographic area from which to draw Board members living in the catchment area, so it might be easier to maintain the required majority of catchment area residents on the Board.
  - 
  -
- disadvantages:
  - Applegrove could put in the work to change the catchment area and Council not approve it.
  - diluting our focus on the existing catchment area
  - 
  -
- the Relationship Framework with the City includes the following:
  - 4.1.5 For membership purposes of the community centre, the Board will establish a catchment area that is geographically defined and locally based. The membership defined by the catchment area is eligible to elect candidates to be recommended to Community Council and Council for appointment to the Board; and may be subject to additional membership requirements set by the Board.
  - 4.1.6 The Board may establish other types of membership including criteria and voting eligibility but only residents in the catchment area are eligible to elect candidates to be recommended to Community Council and Council for appointment to the Board.
  - 4.1.7 The catchment area must be contained in the community centre's governing documents and be on file with the City Manager's Office. The catchment area for community centres does not preclude community centres from delivering specific programs and services that may be Citywide or outside the catchment area.
  - 4.1.8 Changes to a community centre's catchment area must be based on a review of community needs and include a financial analysis identifying any financial impacts on the administrative funding of the community centre. Changes to the catchment area require approval by the community centre's membership and approval of the City Manager.
  - 4.1.9 The City Manager is required to report on major proposed changes to the catchment area or changes to the catchment area that will have material financial impacts on the administrative funding of the community centre to Council. A change in catchment area resulting in a 10 percent increase or decrease in the catchment population will require Council approval.
- consequently, to change the catchment area by more than 10%, we would have to do a financial analysis and present the proposal to a general meeting (either the AGM in March 2010 or a Special Meeting).



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## Report on Strategic Planning Draft 2.0

April 9, 2009

### 1. Summary

Over 2 evenings in mid-February, 28 of Applegrove's stakeholders (members, partners, volunteers, board and staff) invested over 135 hours to consider the centre's strengths and challenges, and develop priorities and action steps. The center's core competencies included:

- Developing and managing a range of programs and events that welcome, support, and meet the needs of the neighbourhood as a whole and of the individuals within it, particularly families with young children, school age children, and teens.
- Recruiting, developing, retaining and valuing volunteers, staff and Board members.
- Understanding, supporting and working with the community to reduce isolation, meet needs, build connections and engage individuals, all of which contribute to a healthy neighbourhood.

Recommendations include:

- \* dealing with facility issues and opportunities;
- \* enhancing Applegrove's identity;
- \* working with partners whether these are on-site, partners in service delivery, or businesses;
- \* addressing understaffing by targeted volunteer recruitment, advocacy, and funding; and,
- \* making the case for funding by demonstrating the value of our services and by enhancing the center's visibility and image.

### 2. Plan

Based on Applegrove's 2006 planning retreat, the process included a research/data gathering phase and 2 evenings of analysis and priorities, to result in an action plan developed with the Board. Principles included:

- building momentum through a quick process;
- enhancing information through a wide range of participants; and
- promoting involvement through fun and informative activities.

### 3. Research/Data Collection

#### a) Information about the local service network

Although social work students collected data about several local agencies, their results did not provide effective information. Consequently, this did not form part of the planning process

#### b) Information about the neighbourhood

Staff analysed census data and provided a range of statistics to the Board for information. Key items were extracted and presented to the planning meetings. They included:

- most of the census tracts in the catchment area have average household incomes below the City average of \$64,000. Overall, the average household income of \$57,000 is about 11% below the City average. However, one census tract has an

average household income more twice the City average. When this census tract is excluded, the average household income of the rest of the catchment area is more than 20% below the City.

- o OEYC<sup>1</sup> data analysis staff identified Applegrove’s neighbourhood in the “Greenwood-Coxwell Corridor” as an area of higher than average “social risk”. Similarly, in early 2009, the Toronto District School Board’s Learning Opportunities Index (LOI) identified the Duke of Connaught within the 100 highest LOI scores of all its elementary schools. Together, these analyses suggest that many of the children in this neighbourhood are at risk for difficulties in school, and consequently, in their later lives. However, the OEYC analysis also found that kindergarten children’s scores on the Early Development Instrument (EDI) in the Greenwood-Coxwell Corridor were higher than would be expected, i.e., children scored better than predicted on the test in senior kindergarten. Applegrove believes that these results show the positive impact of our integrated programs for families with young children.

c) Information about Applegrove:

An outline of programs, their usage, funding, staffing, etc, and the results of user satisfaction surveys where available were circulated to participants or presented at the planning meetings.

d) Information from participants

Although the proposal included a small survey or focus group meetings in programs to ask members how Applegrove benefits them and what else they would like the agency to do, time constraints prevented implementing this.

**4. Participants at Planning Meetings**

We invited about 38 participants, including on-site partners (WoodGreen, Duke of Connaught and S.H. Armstrong), local political representatives, program partners, program participants, Board members and staff.

	Invited	Anticipated	Actual
Board	6+1	6+1	6+1
Staff	10	10	10
Members	3	1	1
On-site	4	4	2
Funders, partners and political reps	13	7	5
Facilitator	1	1	1
Total	38	30	26

Twenty-three participants attended on February 11. Of the 24 people who attended the second session, several had been unable to attend the first week; some of those from the first week had not returned due to illness or competing priorities. Overall, 28 different individuals invested more than about 135 hours in the planning meetings.

**5. Process**

a) February 11

Several different activities helped participants to

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<sup>1</sup> Ontario Early Years Centers

- meet each other;
- learn about Applegrove and its catchment area;
- identify the centre's core competencies (what we do well); and
- generate ideas about changes and directions for the agency.

b) February 18

The second evening began with a review of the core competencies and ideas, changes and directions. Participants then identified the agency's weaknesses, constraints and barriers, as well as ways to address these. The evening ended with a limited-resource, priority-setting exercise (dot-mocracy), a description of the next steps, and an evaluation of the sessions.

## 6. Results

a) Core competencies

Participants identified more than 100 "things Applegrove does well", listed in an appendix. They can be summarized as:

- Developing and managing a range of programs and events that welcome, support, and meet the needs of the neighbourhood as a whole and of the individuals within it, particularly families with young children, school age children, and teens.
- Recruiting, developing, retaining and valuing volunteers, staff and Board members.
- Understanding, supporting and working with the community to reduce isolation, meet needs, build connections and engage individuals, all of which contribute to a healthy neighbourhood.

Analyzing these three key competencies shows that they fulfil the agency's mission, "a neighbourhood partnership fostering community through social and informative programs for individuals and families".

b) Constraints, barriers and ways to address them

Groups of 3 or 4 discussed "what we don't do well" (internal weaknesses), "barriers and constraints" (external limits) and ways to address them. Many of the internal and external factors were then discussed by the whole group, and became part of dot-mocracy. Please see the appendix for a complete listing of the weaknesses, barriers and constraints, and ways to address them.

Key issues included:

- i) working with partners whether these are on-site, partners in service delivery, or businesses;
- ii) dealing with facility issues and opportunities.
- iii) addressing understaffing by targeted volunteer recruitment, advocacy, and funding; and
- iv) making the case for funding by demonstrating the value of our services and by enhancing the center's visibility and image.

Specific ideas have been incorporated into action steps within priorities.

c) Priorities for changes and directions

Participants used a limited-resource priority setting process to recommend priorities. Stickers of apples were used for short-term priorities and dots indicated long-term priorities. Each participant received 1 large apple worth 5 points, 4 red apples worth 2 points each, and 1 red/white apple worth 1 point (all for short-term priorities) plus 1 blue dot worth 5 points and 2 green dots worth 2 points for long-term priorities. Participants then attached their apples and dots to items of their choice.

The table consolidates the results, listing them in priority order.

## 7. Priorities and Action Plan

- a) Secure appropriate space that has better access, a healthier environment, is more attractive and includes space for teens. This should be all in one area within the Duke of Connaught School. The space should be safe, functional, accessible, adaptable, visible and barrier-free.
  - i) Ask the school and daycare to meet to dream about an "early learning wing" (e.g., the main floor of the Woodfield wing) for the long term, and additional partnership opportunities in the short term.
  - ii) Continue to work with City Facilities and Real Estate (F&RE) to improve existing space (new kitchen for lounge, new kitchen and floor for PC) and finalize the lease, and work with City Councillors to ensure funding for these.
  - iii) Work with the school and F&RE as needed to improve signage
  - iv) Hold a design workshop for PC participants to have input into the kitchen re-design, to be included in the 2010 F&RE Capital Budget.
  - v) Meet with local councillors and trustees to discuss space in the school.
  
- b) Identify and secure new sources of funding that are sustainable, creative, innovative and adequate to meet the agency's needs, including corporate/business donations and partnerships, considering both existing and new relationships. This will require demonstrating the value of Applegrove's services
  - to clientele
  - to funders
  - to donors
  - to governments.
  - i) Discuss potential methods at the May Board meeting, including consideration of agency restructuring
  - ii) Work with Councillor Bussin and other representatives to meet with relevant businesses, etc.
  - iii) Invite Chris Irwin to discuss potential methods at a Board meeting before the end of June.
  - iv) Use the EDI data in funding proposals and in newsletter.
  - v) Consider changing "services for parents and children" to Early Development and Support
  
- c) Increase community engagement and enhance Applegrove's identity as connected, visible, clear and distinct via
  - outreach to diverse segments of the catchment area (ethno-cultural and socio-economic, both low and high-income);
  - stronger connections between programs;
  - improved partnerships with the City;

- more partnering with TCHC, East End CHC and other local agencies especially on-site partners Duke of Connaught school, Woodfield Daycare and S.H. Armstrong;
  - visible support in local crises; and
  - more involvement of participants in decision-making.
    - i) Participate on Councillor Fletcher's Community Crisis Response Network
    - ii) Identify and make use of additional opportunities with local media
    - iii) Consider opportunities for a "virtual hub" involving the on-site partners, East End CHC, social services office, etc.
    - iv) Invite on-site partners and local agencies to a meeting to learn about each other and exchange ideas.
    - v) Add testimonials pages to the website and its SPA page.
- d) Ensure services continue to be impactful, collaborative, unique (within the neighbourhood), responsive and adaptable. Outreach to and partnership with TCHC, East End Community Health Centre, and other local and on-site agencies. Specific issues include
- expanding programming for children and teens and have these coordinate by a full-time Child and Youth Worker
  - extending the current range of services for families with young children by, for example, increasing hours in the family resource programs including weekends, expanding Helping Our Babies Grow, offering a school readiness program, etc.
    - i) Implement March Break camp for school age in 2009
    - ii) Plan and advocate for Leadership (teen) program for summer 2009
    - iii) Consider implementing a school readiness program using Therapeutic Play funding.
- e) Other actions to support the above priorities and strengthen the organization:
- i) request a Volunteer Coordinator and voice mail in the 2010 admin. budget.
  - ii) identify additional opportunities for post-secondary placement students.
  - iii) identify and recruit for suitable volunteer opportunities for healthy, active seniors.
  - iv) ensure Applegrove technology is updated through appropriate City processes.

## 8. Next Steps

The Board reviewed this report and generated additional action steps, as did all staff.

Before it was finalized, the draft report was sent to all participants for review and input. Both the discussions and the evaluation forms demonstrated that many participants wanted further involvement. This step will help to secure that involvement and will strengthen the resulting action plan for Applegrove. The revised report came to the Board's April meeting to assess relative priorities among the items and action steps and endorse the resulting plan.

## 9. Evaluation

Participants completed an evaluation form at the end of the second session. Several participants had already left by then, and some of those at the first session did not return, so there are fewer forms than participants.

The 16 completed forms produced an overall satisfaction rate of 3.5 on a 4-point scale, indicating that they enjoyed the process. Particular strengths included:

- the range of participants
- participants/ willingness and effectiveness in generating ideas;
- an engaging and helpful facilitator;
- delicious food.

Several respondents noted their interest in the next steps.

**What Applegrove Does Well**  
**Results of Planning Session on February 11, 2009**

Grouped into categories (some have been put into more than one group)

Welcome and connections

- create a welcoming environment in their programs
- enable families to establish connections with others in their community
- creates a place for community members to connect (a physical place for people's psyches to connect)
- connecting people: creating a meeting point for children, parents/caregivers that establishes a network outside the program
- provides a place of support for parents and caregivers
- connecting people

Volunteers

- keep loyal volunteers
- recruit volunteers
- participants grow up in the centre program to program, then work here too
- nurturing future volunteers (Raptors 50/50, summer camp)
- help volunteers develop skills
- develop voluntary leadership
- helps teens gain their community hours for high school

Effective, high quality programs

- effective programs
- quality programs
- delivering program to the community that are needed and wanted
- meeting the needs of the community
- free or affordable programs
- quality effective programs provide safe, helpful social educational place to go with neighbours
- programs for different ages
- variety of programs offered
- teach life skills
- field trips
- family programs and events (drop-in, summer camp, festival, pasta fest . . . ) help building families
- foster child development
- provides the expertise to have healthy babies and moms
- provide information on a huge variety of things (i.e., health services, education, entertainment, etc., etc.) as needed
- support for lower income families
- support families in need, e.g., "meals on wheels" (informal), "Helping our Babies Grow", "Over the Rainbow", "summer camp" for working parents
- programs as connection point
- assist healthy parenting and caregiving: courses in nutrition, growing children emotionally and craft building
- parent-child programs
- provides a place for children to be safe, grow socially and make a mess
- run fabulous parent child centers

- ☑ great workshops for the parents. Applegrove provides many resources for parents wanting to improve their parenting skills
- ☑ parent relief program
- ☑ parent/child seminars/classes
- ☑ staff helping the caregivers with the children
- ☑ runs fantastic family resource centres
- ☑ children's development (children learn to meet each other, get ready to socialize so ready for school)
- ☑ helping families (parents) by providing advice, skills and guidance
- ☑ Edgewood drop-in offers a healthy atmosphere for child development and parental community
- ☑ parent/child drop-in program provides a fine and safe social and learning environment for young children
- ☑ break isolation of parents/caregivers and their children at home
- ☑ parent and child drop-in centres provide a way for parents to get to know other parents (and child caregivers) in their neighbourhood with kids of similar age, leading to friendships of both parents and children
- ☑ excellent choice of toys, games and activities for the children
- ☑ circle time
- ☑ drop-in programs provide a great place for parents to go, especially during winter months when getting out and playing can be more difficult
- ☑ preparing children for entering school (gr 1)
- ☑ children and youth programming
- ☑ after-school program
- ☑ low-cost, quality summer program (day camp)
- ☑ day camp provides a fun, social and reasonably priced program for children
- ☑ value the need/importance of teen/youth programming in the neighbourhood
- ☑ provides a place for teens
- ☑ teen program provides a place for teens to go (safe and social) keeping them off the street and out of trouble
- ☑ after school programs for teenagers
- ☑ provides helpful workshops for teens to learn and to talk about
- ☑ provides a place for teens to have a safe and active place to be
- ☑ value teaching community, socialize children and youth to create a healthy community re neighbourhood "in group"

#### Develop community

- ☑ understand the neighbourhood
- ☑ work with the community as a team
- ☑ support, understand and work with community
- ☑ support the community
- ☑ affect positively the surrounding neighbourhood within stroller/walking distance
- ☑ meet community needs
- ☑ support a cooperative and collaborative approach
- ☑ Applegrove does an excellent job of involving the parents in decisions that affect its programs
- ☑ create an environment of inclusivity
- ☑ reduce isolation among people in the neighbourhood

#### Board

- Applegrove Board is strong, committed, caring and directed as well as involved
- very committee board members contributing more than 100 hours per month
- committed board x2
- innovative strategies for Board recruitment
- Applegrove has a good Board of Directors and it functions

#### Staff

- quality and caring staff
- quality committed staff
- fosters/recognizes growth, strengths, skills of employees
- provides a strong administrative staff
- staff is committed, cooperative, caring, devoted and innovative, creative, welcoming, very socially aware
- recruit and retain excellent staff
- Applegrove has good devoted staff from top to bottom
- seems to recruit energized (and energetic?) staff
- excellent staff, both in the office and in the drop-in centres; knowledgeable, patient and very good at what they do

#### Administration

- provides a strong administrative staff
- very responsible with finances. Try to the best with what we get, try to get more, etc.

#### Diversity

- welcome participants from a variety of backgrounds, social/economic groups, etc.
- celebrating cultural diversity
  - o holidays and traditions highlighted in each program
  - o theme fundraisers, e.g., spring rolls for lunar new year

#### Events

- run great community events
- plan terrific family fundraising events

#### Other

- having fun every day
- meet individual as well as group needs, i.e. parents within a group of parents
- support
- community
- volunteer/staff
- allow users to experience community centre structure
- provide opportunity for experiences (trips, activities, employment)
- Applegrove has a great reputation in the neighbourhood in our programs
- Applegrove is very aware of the importance of fundraising and involving the community in order to achieve that goal
- Applegrove operating model is great, decentralize and deliver program to needed area, City funds admin expense
- Applegrove can develop programs according to need under financial constraints

### **Summarizing Applegrove’s Core Competencies**

Developing and managing a range of programs and events that welcome, support, and meet the needs of the neighbourhood as a whole and of the individuals within it, particularly families with young children, school age children, and teens.

Recruiting, developing, retaining and valuing volunteers, staff and Board members.

Understanding, supporting and working with the community to reduce isolation, meet needs, build connections and engage individuals, all of which contribute to a healthy neighbourhood.

**A neighbourhood partnership fostering community  
through social and informative programs for individuals and families**

**“TOGETHER, BUILDING COMMUNITY”**

## **Weaknesses, Constraints and Barriers and Ways to Address Them**

February 18, 2009

Groups of 3 or 4 discussed “what we don’t do well” (internal), “barriers and constraints” (external) and ways to address them. Many of the internal and external factors were then discussed by the whole group, and became part of dot-mocracy.

The items below are numbered for identification only. Notes from the various small groups have been randomized.

### **1. What we don’t do well (internal)**

- a) advertise
- b) barriers to our collaboration – we do not network very well within the broader facility
- c) corporate funders
- d) deep level understanding of long-term organizational priorities
- e) engaging the community in the Annual General Meeting
- f) failure or reluctance to dream / loss of hope
- g) fundraising: specific resources
- h) identity differentiation (lack of)
- i) keep up with technology, e.g., voice mail, computer programs
- j) lack of teen programs in the summer
- k) marketing – image, professional look
- l) meeting needs of distressed families (on an individual basis) could be better
- m) no relief staffing to cover vacations
- n) not concentrated
- o) not visible / accessible
- p) offer more program hours
- q) outreach for specific programs
- r) outreach: community residents don’t know about the programs
- s) partner with businesses, e.g., for funds, other resources
- t) partnering
- u) perception of value of services by
  - participants
  - donors
  - funders
  - governments
- v) receive funds from families who frequently visit our programs (money or support)
- w) recruit new, specially skilled retirees to participate as volunteers (in programs and administration)
- x) utilize space

### **2. Barriers and constraints (external)**

- a) bureaucracy
- b) City won’t fund a full-time volunteer coordinator until we have 15,000 hours of volunteer time annually
- c) competition between sectors, e.g., child care, family support, priority neighbourhoods, school boards
- d) diversity, e.g., lack of translation; language specific programs; inclusiveness of the environment, staff and participants
- e) finances

- f) funding (x 2)
- g) funding challenges, e.g., lack of subsidy
- h) lack of staffing, i.e., child/youth worker, grant officer, 9 program director (covering “9” other positions)
- i) no funding for relief staff
- j) not allowed to charge even nominal fee for participation in family resource programs and create sense of value
- k) political will and collaboration at the 3 levels
- l) prioritization of need vs available funding
- m) time for funding vs event planning vs program funding vs planning
- n) unavailable space

**3. Ways to avoid and address them**

- a) 3 full time (Franki, Susan, May) plus part time program staff and volunteers
- b) apply in 2010 budget for half-time volunteer co-ordinator – City policy is that need will be demonstrated when the documented number of active volunteers exceeds 50 and the annual number of volunteer hours exceeds 5,000
- c) being willing to give up ownership
- d) bring in the “expertise”, e.g., marketing, program guest speakers
- e) create a “seamless” service delivery model for families – this involves the partnership component
- f) create a committee that deals with specific issues such as “space” or “funding”
- g) good facility planning process
- h) identify clearer priorities
- i) improved signage
- j) increase participant awareness and valuing of services via communication, newsletters, signage, etc. clarifying impact of programs (both measurable/quantitative and qualitative)
- k) meetings across the agency for support agency-wide
- l) more human resources so that staff can focus on one or two areas rather than having to do multiple tasks.
- m) partner with others and build on each other’s strengths
- n) re-organize funding with professional and dedicated resources
- o) restructure program director role with extra responsibilities delegated to volunteers or Board members
- p) staff with many languages reflective of community
- q) top down support of positive idea generation – create priorities and outline parameters of “hope”

## Planning Retreat Evaluation – February 11 and February 18, 2009

Participants completed an evaluation form at the end of the second session. Several participants had already left by then, and some of those at the first session did not return, so there are fewer forms than participants.

The 16 completed forms produced an overall satisfaction rate of 3.5 on a 4-point scale. Particular strengths included:





- the range of participants and their willingness and effectiveness in generating ideas;
- an engaging and helpful facilitator;
- delicious food.

Several respondents noted their interest in the next steps.

1. The best thing about the sessions was
  - to learn/discuss about the strengths and areas of improvements that Applegrove has.
  - having ideas, thoughts, meeting new faces
  - discussing the issues that we really need to focus on
  - getting together and brainstorming
  - having the leader to move the session along and keep on track. Great opportunity to brainstorm
  - opportunity to share, brainstorm. Having an external facilitator so that staff could participate.
  - brainstorming, opportunity to discuss how we can collaborate more. We are all in the same position
  - having full engagement/participation among members and other agency/organization/group discussion
  - exchanging ideas – finding common ground to move forward
  - the input of Chris to help brainstorm. The “working but casual but serious” spirit.
  - learning that many of the participants care, and knowing more about Applegrove
  - Chris – having an outside facilitator made things easier for staff and partners. Also very good at his job
  - dotmocracy, partner & stakeholder involvement
  - dotmocracy
  - meeting others connected with Applegrove who I did not know before
  - good communication and learning plus getting to know people.
2. What I liked least about the sessions was
  - nothing – except there are barriers need to be addressed positively, not looking at the negative
  - the length of the meeting
  - lack of good technology – the overheads were ineffective
  - overheads: very confusing due to the sizing; could have taken a minute to adjust to be more effective
  - technology for presentation
  - listening to things that don't apply to me because I'm only a teen
  - repetition/overlap during discussion
  - no concrete tie-in. finances? can we do it?
  - hallway exercise
  - comments by [ one individual ]
  - feedback by [ one individual ]
  - a third session “to do” what we decide for Applegrove

- time of day (night)
- having been around for a long time, many issues are the same and many roadblocks are the same

3. Overall, how satisfied are you? (please tick one box)

					Total
✓✓✓✓✓	✓✓✓✓✓	✓			16 responses
8 x 4 = 32	7 x 3 = 21	1 x 2.5 = 2.5			3.5

4. Why?

- (4) feeling of a real working time, learning more about Applegrove
- (4) input by all stakeholders to assess needs
- (4) creative use of time and ideas
- (4) Chris made this process easier than last time
- (4) good to touch base with all members of agency
- (4) because it was nice to know more about the program
- (4) great people, good food and facilitate results
- (4) able to share/exchange valuable information and agree with one another
- (3) I would like to see what was written into some action
- (3) it was frustrating having people not come both nights
- (3) though we would do more financial tie-in
- (3) Feel confident staff and Board will move forward with ideas
- (3) partnerships, willingness to be open. Food was great!
- (3) variety in activities. Practical approach
- (between 2 and 3) some was enjoyable but sometimes seems like the same priorities and conclusions as in the past

5. When Applegrove does this again, we should

- involve immediate stakeholders, political politicians from area => all levels
- have 2 nights in a row; not use hallway
- decrease the length of meeting/session
- have some conclusions and possible directions short-term/long-term
- provide breaks
- have even more people
- have it during the day for partners and 1 evening for staff and others who can't make it during the day
- work with a facilitator (Chris) again
- have Chris (or another facilitator if he is not available) facilitate it
- have it facilitated again
- explain the history of Applegrove, its programs so that everyone is informed.
- report back on results of actual action steps resulting from these 2 sessions
- have more fun
- in a few years

6. Other comments or concerns about the meeting, the process or the organization

- The food was fabulous! Facilitator was excellent and led the planning effectively.

- I liked the process of the meeting making everyone feel welcomed, warm and relaxed, not too serious.
- would have been more productive if all members were present, i.e., Parks and Rec rep, school principal, government reps at both meetings
- invite different business people to give different points of view, professional advice and give input
- DAYCARE on site would be great.
- onsite daycare please



**Applegrove Events and Board / Committee Meetings –April 21, 2009**  
**Office Phone 416-461-8143**

www.ApplegroveCC.ca

**Please note that Board meetings are on Wednesday evenings, usually the second last Wednesday of the month.**

<b>April</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12	13 Applegrove Closed for Easter Monday	14	15	16	17	18
19	20	21	22 Board	23	24	25
26	27	28 [Duke of Connaught School Council]	29	30		

<b>May</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4 7:30 SPA Planning Committee	5	6	7	8	9
10 Mothers' Day	11	12 SPA Night	13	14	15	16
17	18 Applegrove Closed for Victoria Day	19	20 7:00 Board	21	22	23
24 31	25	26 [Duke of Connaught School Council]	27	28	29	30

<b>June</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 7:30 SPA Planning Committee	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16 Neighbours Night Out	17 Board	18	19	20
21	22	23	24	25	26	27
28	29	30				

**Bold** = community event. *Italics* = an important change. Underline = an Applegrove special event.  
 [Brackets] = another group's meeting or event that may affect you.

**Applegrove Events and Board / Committee Meetings –April 21, 2009**  
**Office Phone 416-461-8143**

<b>July</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 Applegrove Closed for Canada Day	2	3	4
5	6 First day of camp	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

<b>August</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3 Applegrove Closed for Simcoe Day	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28 Last day of camp	29
30	31					

<b>September</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7 Applegrove Closed for Labour Day	8 First day of school!	9	10	11	12
13	14	15	16	17	18	19 Applicious!
20	21	22	23 Board	24	25	26
27	28	29	30			

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**Applegrove Events and Board / Committee Meetings –April 21, 2009**  
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<b>October</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9	10
11	12 Applegrove Closed for Thanksgiving	13	14	15	16	17 Pasta Fest!
18	19	20	21 Board	22	23	24
25	26	27	28	29	30	31

<b>November</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11 Applegrove Closed for Remembrance Day	12	13	14
16	16	17	18 Board	19	20	21
22	26	24	25	26	27	28
29	30					

<b>December</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16 Board?	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

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**Applegrove Events and Board / Committee Meetings –April 21, 2009**  
**Office Phone 416-461-8143**

<b>January</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Applegrove Closed – Program Resume week of January 4				1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20 Board	21	22	23
24 31	25	26 [Duke of Connaught School Council]	27	28	29	30

<b>February</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15 Applegrove Closed for Family Day	16	17 Board	18	19	20
21	22	23	24	25	26	27
28						

<b>March</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
March Break						

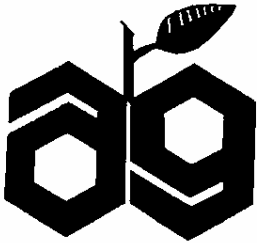
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 [Brackets] = another group's meeting or event that may affect you.

**Applegrove Events and Board / Committee Meetings –April 21, 2009**  
**Office Phone 416-461-8143**

21	22	23	24	25	26	27
28	29	30	31 Annual General Meeting?			

<b>April</b> Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2 Applegrove Closed for Good Friday	3
4	5 Applegrove Closed for Easter Monday	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21 Board	22	23	24
25	26	27	28	29	30	

**Bold** = community event. *Italics* = an important change. Underline = an Applegrove special event.  
 [Brackets] = another group's meeting or event that may affect you.



# APPLEGROVE COMMUNITY COMPLEX

60 Woodfield Road, Toronto, Ontario M4L 2W6

Phone 416-461-8143 Fax 416-461-5513

www.ApplegroveCC.ca

**“TOGETHER, BUILDING OUR COMMUNITY”**

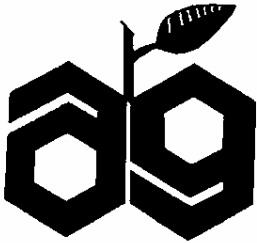


## CORRESPONDENCE/INFORMATION

April 2009

<b>From (Date Received)</b>	<b>Regarding</b>	<b>Action</b>
1. Toronto Water (March 23)	Notice of completion of environmental assessment for Eastern Beaches Storm Sewer Outfalls	R&F
2. Fraser Institute (March 23)	Invitation to apply for Donner Foundation awards for services for children. Deadline May 28	Staff will consider applying, time permitting.
3. City Planning Division (March 6)	Survey of community and neighbourhood associations regarding experience with City Planning	R&F

R&F = Receive and File



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## ***Additional* CORRESPONDENCE/INFORMATION**

April 2009

**From (Date Received)**

**Regarding**

**Action**

4.

R&F = Receive and File

Charitable Number: 10671 8943 RR0001



*Boys and Girls Clubs of Ontario - Provincial Youth Council Conference at Camp Smitty near Ottawa*

## **CHALLENGES AND OPPORTUNITIES FOR ONTARIO'S NOT-FOR-PROFIT SECTOR DURING TOUGH ECONOMIC TIMES**

March 2009



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## CHALLENGES AND OPPORTUNITIES IN THE ECONOMIC CRISIS

Ontario's not-for-profit (NFP) sector faces the current recession, and the challenging times ahead, with a mixture of fear and trepidation, tempered with a sense of opportunity.

The signs are clear. The economic crisis facing this country is more serious than anything we have experienced in decades. The business pages of our daily newspapers tell of a sinking stock market, declining corporate profits, and massive employment lay-offs. Governments at all levels are busy developing stimulus packages without knowing for sure whether they will do the trick.

While most of the headlines talk about the recession's serious impact in the corporate and government sectors, little has been said about the not-for-profit sector. This is probably because the sector is usually quiet, relatively modest, and highly diversified. That said, the role of the sector – which incorporates everything from children's mental health agencies to hospital foundations, after-school youth programs to seniors' clubs, and environmental protection agencies to arts programs for under privileged kids – is more important than ever in these uncertain times.

Early this year, the Ontario Trillium Foundation (OTF) set out to have in-depth conversations with more than 100 NFP organizations across the province. We spoke with a wide range of organizations, large and small, in every region of Ontario. The organizations in our survey do important work in the arts and culture, environment, social services or sports and recreation areas. We asked what they were experiencing, what impact the economic downturn was having on their communities, and how OTF can effectively help. What we heard was clearly cause for concern.

- There is a heightened sense of anxiety about funding and organizational stability, even survival, over the next two or three years.
- At least one-third of the organizations we spoke with are already experiencing serious economic impacts, and all fear that things will get worse before they improve.
- NFP organizations are hearing that many long-term funders, including many United Ways, Community Foundations and family foundations will be reducing their granting programs in 2009 and 2010.
- Stock market declines have had a severe impact on the value of endowment funds that many NFPs have been carefully building for years.
- Corporate donors and sponsors are frequently not renewing their support.
- A number of social service agencies – such as food banks and credit counselling agencies – report significantly increased demand for their services.

It is not all doom and gloom, however. Ontario's not-for-profit sector has weathered storms in the past, and leaders in the sector are busy discussing survival strategies.


- Umbrella groups and networking groups are bringing their members together, to share best practices.
- Agencies are looking for new ways to collaborate with one another.
- Charities are looking at diversifying their fundraising base, and also at opportunities to generate new revenues.
- Concerned funders – such as foundations and United Ways – are actively engaged in explorations of how to have greater impact with fewer dollars.
- Everyone is looking at ways to reduce costs – to do more with less.

There's no question that the NFP sector will need help. Survey respondents had a number of specific suggestions for us at the Ontario Trillium Foundation.

- OTF is asked to take on a greater role in sharing best practices and in convening NFP groups across the province, to help organizations learn from one another.
- Groups would welcome support and assistance for finding new ways to collaborate with other NFPs focusing on the same social objectives or population groups.
- OTF is asked to look at ways of streamlining our grantmaking and reporting processes.
- We are asked to be flexible around the goals and expectations attached to Foundation grants.
- OTF is encouraged to partner with sector networks and other funders to help leverage the impact of its grants.

We are grateful for the input we received, and acknowledge the suggestions as to how we can be helpful. OTF will be carefully considering these suggestions in the coming weeks. We will also be sharing our findings with other funders, and will look for opportunities to collaborate with our colleagues.

Ontario's communities will weather the storm. But we will not succeed without a concerted effort from the NFP sector, its funders and supporters, to respond to the new economic challenges we face. Business-as-usual will not suffice. The OTF mission to build healthy and vibrant communities across Ontario is more relevant today than it ever has been. We look forward to working with colleagues in every part of the not-for-profit sector to strengthen Ontario's communities during these challenging times.



L. Robin Cardozo  
CEO, Ontario Trillium Foundation

## SLUMPING ECONOMY PROMPTS TOUGH DECISIONS FOR CULTURAL VENUE



*Capitol Centre Theatre North Bay has been hard hit by the province's economic challenges. Down \$100,000 in revenue compared to last year the theatre has had to re-budget and rethink its strategy.*

*"Eighty-five per cent of our shows have been affected as a result of our slumping economy," says Dee Adrian, General Manager, Capitol Centre Theatre North Bay. "We were blindsided – we were booking far in advance and it just hit so suddenly."*

*The theatre has had to make some strategic changes, including having to let go staff and reduce hours of operation for the gallery and box office. Come June, the theatre will also operate on reduced hours and will remain closed on Saturdays.*

*"I've had no choice. We're faced with the dilemma of having to do more with less," says Adrian who in addition to managing the organization must also take on roles such as wedding and party planner in order to generate revenue.*

*Visits to major sponsors may help to secure much needed dollars, however sponsorships have been on the decrease partly due to the growing competition between the arts and the hospitals Adrian reports. "Donor fatigue is at an all-time high."*

*In spite of the downturn, the centre is the mecca for arts, culture and entertainment in the northeast. As Adrian recently stated in a solicitation to the membership of the Capitol Centre, "We aren't going anywhere, we just have to plan and conserve for the bumpy road ahead."*

**Dee Adrian, General Manager  
Capitol Centre Theatre North Bay**

## EXECUTIVE SUMMARY

What is happening in the not-for-profit (NFP) sector as the Canadian economy slides into recession? What are the challenges and opportunities presented in difficult economic time?

In January 2009, the Ontario Trillium Foundation (OTF) reached out to 110 of its grantee organizations to take a snapshot of their experiences during the early phases of the economic downturn. Interviewees were surveyed by phone and asked about the impact of the economy to date on their organizations, what impact the downturn was having on their communities, and how they were responding. They were asked for advice on strategies to cope during tough times and asked for ideas for what support OTF and other funders could provide at this time and in the months ahead.

The stories vary but they all carry one underlying message: no one knows what the worst will look like or when it will come. Whether a social services agency in a small town, an arts organization in a city, a rural sports league or a community centre – north, south, east and west – every organization contacted by the Ontario Trillium Foundation in January and February 2009 was looking ahead to a darkening sky.

Almost everyone interviewed could identify issues in their communities related to the economic downturn. There is a sense that we are experiencing a fundamental shift in how the economy is structured. The plants are closed, the jobs are gone.

In addition to NFP organizations, OTF turned to a number of community and province-wide funding organizations as well as community leaders. What pressures were they feeling? What plans were they putting in place to support the organizations they fund? How are they coping with reduced income streams?

Coming out of this series of interviews is a picture of current and emerging issues and opportunities for the not-for-profit sector and the organizations that support it.

### POCKET-FRIENDLY SPORTS ALTERNATIVES GOOD BET IN THE COMING MONTHS

*Basketball is often a more affordable sports option for some families. That's why Port Colborne Youth Basketball has an optimistic outlook during this time of economic uncertainty.*

*"We may actually face the issue of more people joining our programs," says Association Board member Carrie Yallin. "I can't see our numbers dropping to the point where we are worried although if there are families with two or three children in our programs that lose a job, we may see a dip."*

*Port Colborne Youth Basketball is a small club in a small community. It handles about 300 registrations, which help cover the majority of the club's operating costs. Business sponsorships also help with the organization's house league program.*

*"Our costs are relatively low to begin with so we're not looking at changing our fees at this time," says Yallin. "Our programs don't tend to change. We just need to promote them and make sure they continue to be accessible to youth."*

*While the organization's outlook is positive, Yallin says they intend to keep monitoring what's happening in the economy. They recognize the need to be more observant so that families don't fall through the cracks.*

*"By getting the word out about opportunities for subsidies, we hope to avoid the issue of parents just telling their children 'no'."*

**Carrie Yallin, Board member  
Port Colborne Youth Basketball Association**



## **Impact of the Economic Downturn**

Put simply, the impact of the economic downturn varies by sector and by the services being delivered. One issue is clear, the effects of the downturn are far from fully realized.

Roughly two-thirds of the organizations surveyed said that while they are very concerned about the economy it is too early to say what the impact of the downturn will be. About one-third reported they are already experiencing an impact. Organizations with a significant portion of self-generated revenues such as ticket sales or events are feeling the impact of the downturn on a greater scale. Many respondents say that some parts of the sector are already being hit hard with service demand issues (such as food banks, credit counselling, mental health counselling, employment counselling). The environment sector while concerned about the downturn is looking for possible opportunities as awareness of environmental issues continues to increase.

## **Impact on Communities**

Location has a great deal to do with the impact of the downturn on a community. In northern and northwestern Ontario NFPs were less able to identify when the downturn actually started as they have been experiencing significant economic pressure for several years. In other areas of the province many organizations in smaller centres reported seeing a decline in the economy of their communities in recent months. In general, there is a heightened sense of anxiety and fear about the year ahead.

## **How Organizations Are Responding**

Response is varied across the sector. Large or small, those agencies that have approached the challenges of the downturn with a plan and strategy in place are more likely to have started to make changes and reach out to others in an effort to find creative solutions to manage as budgets shrink.

Most organizations surveyed are being more conservative in their budgeting for 2009 and some are developing cautious and worst-case budget scenarios. Organizations are becoming more involved in networks and advocacy issues on behalf of the sector. Some smaller agencies are worried about their survival and looking for ways to collaborate to reduce costs. Others are responding with innovative ideas and new partnerships.

## **Strategies for Managing During Tough Times**

A range of ideas and strategies for managing NFPs were suggested by those organizations responding to the survey. A number of organizations suggested that networks and umbrella organizations play an important role during challenging times, helping share information, integrate services and plan better.

## **Response from Funding Organizations**

There is increasing pressure on funding organizations (funders) supporting the NFP sector at a time when their investments have been hard hit.

In general funders have expressed a commitment to meet existing agreements, but most cannot take on new grant commitments. Funders are looking for opportunities to work with communities in other ways, to act as community conveners and to leverage their grantmaking with opportunities for collaboration and co-operation.

A large number of community and family foundations have lost a significant amount of endowment fund capital. This will have an impact on the dollars available for grantmaking in 2009 and 2010. At least one large Community Foundation has announced that it will not be making discretionary grants in 2009.

A number of United Ways have raised fewer funds than last year, and have seen their endowment / reserve funds shrink. They will, however, be making every effort to continue core funding at a time when many of their agencies are reporting an increase in need for agency services.

Community and family foundations and United Ways are concerned that the real impact of the economic crisis may be felt in 2010, more than in 2009.

## PROACTIVE APPROACH KEY TO PREPARING FOR TOUGH ROAD AHEAD

*Jack McGinnis, Chair of Durham Sustain Ability's Board of Directors says that not-for-profit organizations should be looking for the silver lining during this time of economic instability.*

*"It's an opportunity to retool -- do things differently to advance our goals for the environment," he says.*

*McGinnis works for an environmental organization that facilitates community-based sustainable action. By developing programs and supporting the practical actions of municipalities, businesses, community groups and individuals, Durham Sustain Ability is helping with the move towards a sustainable future.*

*Although his organization has not experienced any negative impact from the downturn thus far, the Board of Directors is taking a proactive approach by adjusting their programs to meet the needs of customers who may have less money to spend. They're also assessing their business, making smart decisions like choosing to do more work in schools and municipalities, which may see fewer disruptions.*



*McGinnis also sees a growing interest in energy saving alternatives. "We had a huge turnout at our solar workshop recently and we expect that interest will continue to grow as people look for ways to save money."*

*Durham Sustain Ability has come out with a practical action program for sustainability designed to fit with the times we are in. They have already done a lot of work in the City of Pickering ([sustainablepickering.com](http://sustainablepickering.com)) and are now engaging with other municipalities across Durham region. The organization is moving ahead with its EcoBusiness initiative. The [eco-business.ca](http://eco-business.ca) website was recently launched and provides tools and techniques to help businesses maximize their company value.*

*"These tough economic times provide an opportunity to change the way things are done," says McGinnis. "Some great things are in store for the environment sector and through teamwork, partnerships and community involvement we can help move towards a sustainable future, environmentally and economically."*

**Jack McGinnis,  
Chair of Durham Sustain Ability's Board of Directors**

## CHAPTER ONE: LISTENING TO OTF GRANTEES

### Impact of the Economic Downturn to Date

As interviews progressed throughout January, it became clear that organizations are thinking about and planning for the economic downturn. Early this year they had been assessing results of year-end statistics, such as December fundraising campaigns or client numbers. Organizations have also been increasingly aware of and affected by news reports of economic stimulus packages from the provincial and federal governments and job losses throughout Ontario. While there were no significant differences in responses between Francophone and English-speaking organizations the location of their operations appears to have much to do with their attitudes about the effects of the downturn.

Of the organizations surveyed, there were as many that said they were seriously thinking about how the downturn would affect their work, as there were saying they had not thought about it much at all. The rest were somewhere in between. Some respondents indicated that this OTF survey was the trigger to begin thinking about the potential impact of the downturn. Many respondents said “ask me again in two or three months” as the answers would be clearer by April.

### Revenue Pressures Increase

A majority of organizations surveyed in January 2009 (about two-thirds) indicated their revenues had not been affected by the economic downturn thus far. The organizations that reported feeling some impact tended to be smaller and were dependent on revenue generated from special events, ticket sales, etc. About a third of the organizations surveyed said that they were definitely feeling the impact of the economic downturn at this time.

A number of organizations reported that year-end fundraising campaigns in 2008 raised significantly less funds than in previous years. There were also examples cited of corporate sponsorship declining, especially from smaller businesses and service clubs.

#### *Community Centre Revenues Hard Hit*

*“The rental income for the Centre has really gone down and the restaurant has lost close to 60% in revenue attributed directly to the downturn in the auto industry given the proximity to the Club.”*

*-- Cultural centre in southwestern Ontario*

For the large organizations (mostly social services or arts) that rely on government grants and contracts, most indicated they were taking a “wait and see” attitude. Many have federal and provincial government-funded contracts that end by April 2009 and most government ministries are not able to confirm funding changes with agencies.

Organizations indicated they are under pressure as they already know they will receive fewer grants from all sources in 2009. Several indicated they had heard from or know of private and community foundations that have announced plans to flatline or reduce grants. In particular, environmental and arts organizations appear to be more vulnerable due to their reliance on both private and community foundations. Larger organizations with endowments such as symphonies, orchestras and theatres have also been affected by declining equity values. United Way campaigns across Ontario have experienced their most challenging campaign in decades. The impact of this will be better understood in the next few months as United Ways announce their allocation levels for 2009.

### Demand for Services and Programs an Unknown

In terms of service demand, human/social services are clearly feeling the effects of the downturn. Certainly, in some communities like St. Catharines and Niagara Falls, it is very clear that the numbers of working poor coming to agencies for help are increasing. Food banks, employment agencies and credit counselling services are all seeing unexpected increases in the number of clients.

## Job Losses Drive Community Impact

In smaller cities and towns, people were more likely to have specific examples of how the downturn was affecting their community and could link them to their agency's services. These included the shutdown of Volvo in Goderich (a loss of 400 jobs) John Deere in Welland (a loss of up to 800 jobs), and the closing of the racetrack in Fort Erie (a loss of 200 jobs). In many of these communities, people working in agencies have friends, neighbours or family directly affected by job losses.

## Regional Impact Different Depending on Location

For respondents, particularly in northern communities like Thunder Bay, there is a feeling that the economic downturn is nothing new. Many could not say how recent economic news was affecting their community. However, it was clear that many communities in southwestern Ontario, both small and large centres, have felt the impact of the downturn very rapidly in the past several weeks.

Agencies in the Greater Toronto Area, in general, did not indicate they were experiencing an impact when interviewed in January. Given job losses some social service agencies such as food banks, credit and job counselling services noted that they were experiencing increases in service demand.

## Impact Varies by Sector

OTF focuses on four specific sectors – human and social services, arts and culture, sports and recreation and the environment. The feedback from survey respondents indicates the economic downturn is having a different impact on each of the four sectors. While further research will need to be done on how the economic downturn may impact different funding models and agency budgets, general trends can already be identified.

Organizations working on sustainable energy, conservation, and other environmental issues, all saw possible growth opportunities in the coming year, either through new partnerships with government or potential funding increases. Some of these organizations were concerned about cuts in foundation funding, but most seemed optimistic about other opportunities in the economy. Some groups working on local tourism or libraries also saw potential opportunity in the downturn.

Social service organizations are clearly most affected by increased service demand from job loss and anxiety over the economy. There were real examples of increases, even dramatic increases, in clients coming to food banks, employment counselling agencies and credit counselling agencies. Organizations such as youth services, women's shelters and family counselling, were less able to identify an impact on service delivery at this time. All were anxious about the future given the possibility that many families could be forced to downgrade their housing and cut back on some of the basic family activities due to a reduction in household income.

The impact on arts and cultural organizations seemed mixed at this point in the year. Smaller arts organizations have been seriously hurt by declines in audience attendance or cuts in sponsorship or foundation funding. Other arts services organizations indicated that the impact of the downturn on their members was hard to tell and that it might be very specific to particular organizations.

### *Community Funder Overwhelmed by Grant Requests*

*"We have so many requests from community groups for support that we can't keep up. There has been an increase in requests due to the economic downturn. Our own funding is not increasing – there hasn't been an increase in our level of funding for the last four years yet every time an industry or business closes our demand rate increases."*

*-- Provincial economic development agency*

### *Families Cut Back on Recreational Expenses*

*"We anticipate a decrease in membership participation of between five and seven per cent for the 2009 season and therefore our revenue will be down by the same amount as we compete for members, families and their friends' recreational dollars."*

*-- Provincial sports association*

Organizations working in the area of sports and recreation are concerned how job losses could affect the ability of Ontario families to participate in community and local sports. Organizations offering less expensive sports, such as basketball, indicated that demand could increase this year. Some sports support organizations are concerned that sports clubs could see a decline in the ability of local companies to sponsor clubs. This could affect their ability to pay for access to municipal recreation facilities like arenas, pools and rinks. Many are also facing an increase in charges for community use facilities as municipalities scramble to increase revenues.

## How Organizations are Responding to the Downturn

In general the organizations responding to the survey said they are being far more conservative. Almost all surveyed talked about being more risk-averse in their planning and more fiscally prudent. A few are ahead of the curve and have developed cautious and worst-case budget scenarios for 2009 with varying revenue projections and expenditures so that they are ready to respond to funding realities. Other organizations indicated they will not follow through on previously announced expansion plans or new initiatives. Many surveyed participants talked about the value of the NFP sector as a vehicle to create economic stimulus.

There was some concern from network- or membership-based organizations that their members were not adequately prepared for possible funding reductions.

Collaboration and partnership was often raised as a possible response to the downturn. Increased collaboration around advocacy issues was mentioned as a tactic; others identified sharing resources such as space or staff. Innovative examples of staff sharing were highlighted as promising practices. For instance, the YMCAs of Ontario are sharing “principles for managing in tough times” through their network.

A number of agencies, especially the membership-based or network organizations, spoke about getting involved in broader advocacy initiatives in the NFP sector. A number of groups OTF spoke with are part of Imagine Canada’s work to brief the federal government on short-term stimulus measures.

The survey found a number of creative responses to the downturn. Organizations that rely on local small business sponsorships are turning to bartering (exchanging goods or services for ad space or public relations support). Some agencies are looking at new ways to generate revenue including social enterprise solutions. One membership organization has launched new online support services for its members and an arts service organization is reducing costs by using email outreach instead of regular mail. While a viable option, organizations expressed concern that social enterprise efforts, while generating revenue, might divert organizations from their long-term goals.

## Strategies for Managing During Tough Times

Many interviewees talked about how they or their organizations coped during previous economic challenges, whether it was the recession of the early '90s or the cutbacks of the mid '90s. A number of new and innovative strategies were also suggested, including:

- Increased knowledge-sharing among NFPs – especially around topics such as finance and budget-planning, strategy development, and human resource issues.
- Creativity around human resources, including job-sharing and retraining staff for new jobs.
- The need for umbrella groups and networks to support NFPs with capacity-building resources, tools and templates and even moral support during this time.
- Boards of directors using this time to review their mandates and ensure that they are focused on their mission.
- Developing principles for managing during tough times such as the YMCA client-focused decision-making framework, which is helping its members to manage during difficult times.

### *Organizations Cut Back as they Anticipate Fundraising Shortfalls*

*“We are sensitive to the fact that these are hard times. We are a rural area and we know that some people are being affected. This has caused us to rethink our fundraising efforts and scale back.”*

*-- Conservation organization in western Ontario*

- Learning how to use technology better to reduce costs, improve services or connect with community members. This could include wikis, webinars or shared project management software.
- Developing better practices around shared services and shared space. Some parts of the sector have done this for years - such as the arts - and have learned many lessons. One network organization identified bulk purchasing models as a possible cost reduction strategy.
- Developing social enterprises and partnerships to create revenue-generation strategies.
- Organizational “bartering” where goods and services can be traded between organizations. One organization surveyed exchanges product gift certificates for advertising space in a magazine.
- Creating virtual offices to reduce infrastructure and rent costs.
- Focusing on core audiences and stakeholders. It is important to know your close supporters and communicate with them through this period of economic uncertainty.

*Increasing Communication Across the Sector one Solution to Helping Organizations Cope in Challenging Times*

*“It wouldn’t hurt for us to have a think tank of various funders and provincial networks to talk about how we can collectively support one another during this downturn. We have to meet and strategize across the sector.”*

*-- A United Way*

### **Respondents Suggest a “to do list” for OTF**

Respondents were overwhelmingly positive about the role of OTF as both a funder and a voice for the NFP sector in Ontario. There were many positive comments about the professional support provided by OTF program staff and the role they play in supporting the sector within their communities. Generally the message was “keep doing what you are doing.” The following are some suggestions of ways that OTF might support grantees and the sector:

- Noting the “bigger picture” viewpoint of OTF, many respondents indicated they would appreciate knowing more about what is happening across the sector today. Suggestions included convening forums, providing online information, hosting workshops, and sharing best practices, tools and resources, perhaps around challenges and opportunities related to the downturn.
- Many suggested streamlining OTF funding processes and how changes could be made to reduce administrative work, especially for small organizations. Smaller grantees talked about making the process faster for smaller grants.
- Recognizing the possible challenges with fundraising and financial sustainability today, some respondents suggested flexibility around expectations and goals set in funding proposals.
- Many respondents wanted to see OTF be an even bigger voice for the NFP sector. An example provided was to have more communication around how NFPs are stimulating economic growth and providing jobs.
- It was suggested that OTF partner with networks or associations such as The Ontario Nonprofit Network, local United Ways or the various arts service organizations to provide information around collaborating or innovations in the sector.
- Other suggestions to OTF included: emergency support funds for organizations that face cash flow issues related to the downturn, social enterprise loans, grants for restructuring and collaboration, more funds for evaluation and multi-year core funding. One respondent referenced an “economic stabilization” fund that was jointly created in the recession of the early ’80s by United Ways and OTF that provided a number of streams of different emergency funds.

OTF is uniquely positioned to bring together cross-sectoral groups of organizations to maximize opportunities in local communities whether that is through providing grants to collaboratives, umbrella organizations or as the local convener.

## Suggestions for Other Funders and the NFP Sector in General

Many respondents talked about how useful it would be for NFPs and funding organizations (funders) to share strategies and practices for managing during a recession. There is a lot of interest in dialogue and collaboration on topics related to the economic downturn. Topics range from technical, human resource and financial issues, to broader questions around the role of the NFP sector in the economic well-being and sustainability of community life. Funding agencies may also want to collaborate on how they could jointly support NFP agencies or programs that are in precarious financial positions.

Most environmental groups surveyed often referred to the growing partnerships between themselves and municipalities. Certain organizations working on environmental issues seem less worried about the impact of the downturn on finances, but did have concerns about how to manage growth and take advantage of emerging opportunities.

In thinking about broader funding strategies many survey respondents identified the need to focus on maintaining existing services and programs. They identified a range of options from maintaining the status quo, taking the position that a recession is not the time to try new things. On the other hand another group of respondents did not see this as the time to “circle the wagons,” but instead want to use the opportunities presented by the downturn to innovate and support new, emerging trends in service and program development and delivery.

### ENVIRONMENTAL SOLUTIONS A SMART WAY TO CUT COSTS

*Friends of Fort Erie's Creeks (FOFEC) is feeling the effects of today's turbulent economy and are revisiting their strategic plan as a result. "We're basically tightening our belt," says Yvonne Hopkins, Project Co-ordinator for the group.*

*FOFEC has already installed a solar panel to save on utilities and are using rainwater as its main water source. The organization believes others can learn from their example, especially when looking for smart ways to cut costs.*

*Friends of Fort Erie's Creeks is committed to the protection, restoration and improvement of the local waterscape so that healthy ecosystems exist for people and wildlife. The organization is actively involved in the community. Over the past few years they have held educational talks at local schools and "hands on days" at the creeks for students; completed water quality testing and analysis of the creeks; undertaken physical clean-ups of the creeks; coordinated summer employment for environmentally directed students; and a number of other environmental initiatives.*

*No stranger to tough times, over the past three years, FOFEC has been seeing a significant decline in funding from charitable bingos - a large funder of Fort Erie's not-for-profit community. While FOFEC is knowledgeable about other funding options, Hopkins says many groups simply don't know what funding is available for environmental groups.*

*"The knowledge isn't out there," she says. "Some small groups in the community have already closed down, while others are trying to streamline their services. We're all having to do more planning to survive," she says.*

*As competition increases, FOFEC will continue to work at being an attractive and stable environmental group in the community. The organization is in the process of developing a policy manual, which will help them improve efficiency.*



**Yvonne Hopkins, Project Co-ordinator  
Friends of Fort Erie's Creeks**

## CHAPTER TWO: NEWS FROM FUNDING ORGANIZATIONS

Through our networks and partnerships, OTF had numerous conversations with 29 local and provincial funding agencies and foundations and several family foundations in January and February 2009. Unlike OTF, these organizations are dependent upon endowed funds as well as private income sources for their funds. OTF is a publicly funded foundation, not dependent upon investments as a source for funding dollars.

The economic downturn is top of mind for these agencies and foundations. Many have experienced dramatic losses in their equity capital. Perhaps because of this we found that, in general, funders tend to be more pessimistic about the economy than grant recipients responding to this survey although the two groups share many of the same issues. We see this converging of mind-sets as encouraging. It appears certain that the NFP sector and its funders will need to work together to meet the challenges and discover the opportunities presented by the current economic crisis. Building healthy and vibrant communities is a true community effort that requires all partners to pool their knowledge, expertise and experience.

### *Great Challenges Produce New Opportunities*

*“The great unknown, how deep, how long and how significant the recessionary environment may affect commerce is unknown. We are taking a practical view that it will affect every industry and sector; possibly charity and sport the greatest. However, we also believe that great challenge produces new opportunities and [we] will continue to position the organization to take advantage of same.”*

*-- Provincial organization serving Ontarians with disabilities*

### **Endowments Hard Hit by Shrinking Equity Values**

Both community and family foundations experienced significant losses to their endowment fund capital when stock markets tumbled in 2008. As the income from endowment capital is the source of granting dollars, this decline translates into a reduction in the amount of money available to granting programs. Some foundations have chosen to suspend all discretionary granting, others are reducing their grant programs and others are waiting for legal advice as to whether they are able to access capital funds to augment granting funds for 2009 – and beyond.

Current provincial financial regulations do not allow organization to have access to the capital portion of endowed funds. As the fallout from the stock market downfall becomes apparent, foundations are calling for clearer guidelines from both the Canada Revenue Agency and the Ontario Government around charitable disbursements and the use of capital in extraordinary times.

### *Equity Losses Lead to Grant Hiatus*

*“There has been a major suspension of our granting program for the entire fiscal year and when we made the community aware that we would not be granting this year there was a general response of concern. The organizations are worried about where to find funding and are scrambling to find other sources, such as OTF.”*

*-- Community Foundation in Eastern Ontario*

### *Concerns About Donor Ability to Meet Pledges*

*“We regularly build in a 2.5% cushion to allow for pledges that aren’t honoured, this year we’ll be increasing that to 3.5% as we anticipate that more people may not be able to honour their pledge. We’re concerned about next year’s campaign.”*

*-- United Way in Southwestern Ontario*

### **Wait and See Approach a Common Strategy**

The majority of funders are watching and waiting to see exactly how broad and how deep the economic fallout will be in their communities. The downturn in the economy coincided with the annual campaigns of many United Way agencies across the province and many reported significant challenges. As a major funder of community organizations across the province, any fundraising shortfall could be an ominous sign in many communities. Even those United Ways that have met – or exceeded – their campaign targets are facing pressure from the frontline agencies they support as they are already experiencing an increase in demand for services.

A major concern of the United Ways responding to the survey is the ability or inability of donors to meet pledges particularly those that come through payroll deduction. Job losses and company closings have prompted many United Ways to increase the anticipated “pledge drop-off” rate. Another potentially larger and more immediate financial loss seems to be sponsorship dollars. Many community fundraising events depend on sponsorship arrangements. Corporate sponsorship dollars have also been reduced and without sponsorship, many events will not be held. While still early days, there have already been random reports of delays or cancellation of fundraising events.

### **Sense that Fundamental Shift is Underway**

As the economic news seems to worsen daily for those in southern Ontario, one-industry and northern towns and cities have been experiencing economic turmoil for years as waves of cuts and plant closures have taken place.

Local funders, even in the hard-hit north, say that this economic downturn is different and is having a more dramatic effect on local communities. The impacts of job losses and business closures go beyond individual families to affect local businesses, sports organizations and arts groups. As local municipalities face a decreased tax base, both provincial and federal financial resources and funding are also stretched to meet increasing needs in the community.

*Ability to Sustain the NFP Infrastructure at Risk*

*“There is a real and pervasive sense of uncertainty. We will need to sustain families while substantial retraining occurs but municipal grants will not be enough to sustain some organizations such as arts groups who will also experience other revenue declines.”*

*-- Granting organization in Southwestern Ontario*

### **Pragmatic Approach, Sticking with Core Programming Now the Focus**

Funders and the groups that they support may be unsure what to expect but many, particularly social service organizations, are gearing up for an upsurge in clients and an increased need for frontline services. Some funding organizations report that the NFPs they support appear to be unsure if they can cope with the increased demand. Others report NFPs are sticking with their core programming and will not launch new programs. For their part, funders say they are committed to work with NFPs to find innovative solutions with the limited resources they have.

### **Threats to the Volunteer Base Due to Job Loss, Erosion of Retirement Funds**

One issue that garnered a mixed response during the survey is volunteerism. Some funders and their local NFPs are concerned that they will lose experienced skilled volunteers while others are anticipating increases in their volunteer base as people give with time when they can't give with money. As the traditional volunteer base is filled with many active retirees, there is a concern many may be forced back to work to make up the shortfall in their ravaged pension incomes. Issues were also raised about how NFPs will be able to support existing volunteers who may be facing financial hardship through job loss. Ensuring organizations have the capacity to train, support and retain volunteers may be an issue funding organizations need to address more explicitly in their grantmaking during the next few years.

*Retirees to be Forced Back into the Workforce in Order to Make Ends Meet?*

*“Many of our key volunteers, particularly on the event side, are semi or early retirees. Given the equity erosion of many retirement portfolios, we are anticipating less availability as many of these volunteers seek part or full-time work.”*

*-- Provincial sports organization*

### **Resiliency of the NFP Sector Identified as Key to Community Survival**

Funders and the NFPs they support were candid about the challenges they expect to deal with during this economic downturn. While many expressed fear for the survival of their communities, what became clear through all of the interviews was their confidence in the resiliency of the NFP sector in Ontario. Funders are talking to each other, to the NFPs they fund as well as their communities. They stated that these conversations will continue.

Many family and community foundations learned difficult lessons in previous economic downturns and have put contingency plans in place to offset the worst effects. Many are looking toward new ways of working with their community partners and are seizing this opportunity to effect change and explore new ways of doing what they've always done – but better and more effectively in the future.

### **Leveraging Community Expertise and Finding Ways to Work Together**

Funders recognize that NFP agencies and community organizations need to learn from each other and that they have a pivotal role to play in facilitating community convening events. Frontline agencies and volunteer-run organizations have expertise and knowledge to share but need to be given the time and opportunity to come together to build collaborative partnerships. While this should be happening all the time, it will be critical to the sector during these tough economic times.

Funders also expressed a strong desire to work more closely with each other in order to leverage local knowledge to meet community priorities in their grantmaking. They are eager to find ways to facilitate dialogue, knowledge sharing and collaboration in the sector.

At a grantmaking level, many funders expressed the need for continued operational funding to agencies and organizations as they re-organize, re-prioritize and struggle to meet the needs of their communities. Several of these organizations made it clear that OTF must continue to fund and support the four sectors paying special attention to the arts and sports sectors. These two sectors provide vital support to communities as they go through challenging times.

### **Where do We Go from Here?**

When OTF launched this survey in early January, we anticipated it would be a one-time snap shot to help us better gauge and respond to the NFP sector during the economic downturn. The information we gathered has prompted us to take a longer term view of the importance of “taking the pulse” throughout the next several months. OTF will be doing this through a number of initiatives including in-person and online consultations and partnerships with networks and collaborations to support information-sharing within and between communities and sectors.

OTF will provide resources and links to community partners' resources as a tool for organizations to gain knowledge, expertise and experience of others through an online community on the OTF website. A particular emphasis will be placed on supporting knowledge sharing around revenue generation.

OTF is committed to collaborating with local funders in building community investment strategies to better meet the funding needs of local organizations and agencies.

OTF will continue to explore strategies to streamline grantmaking over the coming months including the launch later this year of a new online grant application process which is currently being tested in two of our granting regions.

## LONG TERM PLANNING HELPS FOOD AGENCY PROTECT CORE OPERATIONS



*The not-for-profit sector is sure to experience hardships due to the economic times we are in, however Debbie Field, Executive Director of FoodShare says that this is an amazing opportunity for the social services sector to play a strong role.*

*“There is a real understanding and willingness to accept that there is a need for programs like ours,” says Field. “I’m finding that there is an openness to investing in the most vulnerable parts of our society. People also recognize the need for a social and economic investment strategy – a realignment of our economy and public investment.”*

*FoodShare works on food issues, from the growing, processing and distribution of food to its purchase, cooking and consumption. It operates several grassroots projects that promote healthy eating, teach food preparation and cultivation, develop community capacity and create non-market-based forms of food distribution.*

*Although the organization’s fundraising is down \$100,000 and some foundations have declined requests for funding, a few large donors have helped to offset this shortfall. The organization also began looking at potential challenges as early as last October. “We recognized that donations would go down and began budgeting more conservatively from then. We’re in risk management mode,” says Field.*

*Past experience has helped FoodShare be more resilient. While they were forced to lay off staff during the last recession, the organization is in a much better position this time around.*

*“Because there is an increased understanding of the role of food and the environment, we believe we’re in a better position to sustain our operations. We also understand that organizations just have to keep going – even if there is reduced funding.”*

**Debbie Field, Executive Director  
FoodShare (Toronto)**

## APPENDIX A: METHODOLOGY

### GRANTEE CONSULTATIONS

#### Who was surveyed?

Interviews were conducted in two phases. The first six interviews were conducted between December 22, 2008 and January 2, 2009. These interviews helped develop and frame the questions for phase two of the survey. The second phase involved interviews conducted between January 12 and 28, 2009. All interviewees were told that their input would be confidential.

In total, 123 organizations were approached to be interviewed, including 86 grantees from the OTF Community Program and 37 grantees from the Province-Wide Program.

These organizations represent both rural and urban communities located across Ontario. They ranged in size from larger multi-million dollar organizations to small, volunteer run associations and clubs. The sample included organizations serving First Nations communities, people with disabilities and ethno-cultural and racial minorities. Most interviewees were executive directors, with some Board presidents, treasurers, finance directors and development directors.

Of the 123 organizations approached, only 100 were surveyed. Twenty-two did not respond to repeated emails and calls, while one organization requested deferring their response until February. This 81 per cent response rate can be considered very positive.

The 100 responding organizations fell into the following categories:

- Human and Social Services - 44 organizations (out of 50 approached)
- Arts and Culture - 23 organizations (out of 26)
- Environment - 21 organizations (out of 24)
- Sports and Recreation - 12 organizations (out of 23)

#### Survey Questions and Methodology

With advice from Research and Evaluation staff at OTF, interviewees were asked the following six questions:

- Could you tell me about how your organization is being impacted by the current economic downturn?
- Is the downturn having a particular impact in your community?
- How is your organization responding to the economic downturn?
- Thinking back over the past few years, what are some strategies that you've put in place that you think will be the most helpful in tough times?
- What can OTF do differently to help in the short-term and the long-term?
- What should others (funders, organizations, communities) do differently during these times?

## FUNDER CONSULTATIONS

### Who was surveyed?

Twenty-nine local funding organizations were interviewed, or participated in roundtable discussions. Participants included United Ways, community foundations, family foundations and municipalities.

### Survey Questions and Methodology

#### 1. Is your organization feeling the impact of the economic downturn?

- Have there been any funding implications to date?
- Do you know of funding reductions coming in 2009?
- Are you facing any human resource or staffing issues due to the downturn?
- Do you have a sense of how your local community will be affected by the downturn?
- What are your immediate challenges in 2009?
- Any thoughts about longer term challenges you may be facing?

#### 2. How are you responding or planning to respond to the economic downturn?

- On your own or in collaboration with others in your community?
- Are you using strategies you have tried in the past to weather the current economic challenges?
- Are you considering or taking any new, creative or innovative approaches?

#### 3. What do you need to help you respond effectively during tough times?

- Short term? Longer term?
- Is there anything OTF should be focusing on to address the economic downturn and the challenges we face?
- What can we do together?

#### 4. Do you have any final suggestions or comments?

## CLUBS PLACE EMPHASIS ON PROTECTING INFRASTRUCTURE TO SUPPORT KEY SERVICES

*Demand for Boys and Girls Clubs' affordable after-school physical recreation and nutrition, arts and crafts, computer literacy, homework help, breakfast and supper programs and other initiatives is increasing, and our troubled economy is to blame says Sandra Morris, Regional Director, Boys and Girls Clubs of Ontario. To keep up with the growing need for these services, the clubs have had to extend staff hours and add to their snack and meal programs. "The disadvantages that families are now facing appear to be multiplying," says Morris.*



*Boys and Girls Clubs of Ontario works with a network of 25 community Boys and Girls Clubs organizations at about 100 service locations in Ontario. The clubs are experienced in providing programs that support the healthy physical, educational and social development of 75,000 young people and their families each year. Each club offers an affordable, safe and supportive place for children and youth, after-school, and at other times when children are not in school, to experience new opportunities, gain healthy attitudes and behaviours and develop essential skills to help them realize their best potential in life. Many clubs also provide nutritious snacks and meals, emergency shelter, family support programs and other supports to children, youth and families at risk.*

*Clubs normally receive strong support from United Way, government, foundation and other funders. "This year, some clubs are receiving indication that some planned funding will not materialize, or will be cut significantly, as sponsors scale back," says Morris.*

*Although the organization is feeling some pressure, it has been extremely proactive in responding. "Clubs are monitoring their budgets closely, working hard to make up any potential gaps, and taking steps to reduce costs and protect core programs," says Morris. The 25 Boys and Girls Clubs across Ontario also have an active strategy and policy around expansion, where the focus is on expanding programs and services rather than new agencies. "A satellite model is in place, which helps to mitigate costs through collaboration and shared staffing," says Morris. "It's a longstanding tradition of the Boys and Girls Clubs' network to be more efficient, flexible and responsive to changing economic and social conditions and this model is helping us achieve that."*

*While others may choose to pursue emerging initiatives, Morris believes that in this economic climate, the clubs will seek to protect and preserve their existing key programs that support at-risk children, youth and families.*

*Morris says that clubs also recognize the need to reach out to municipalities, schools, other levels of government and other organizations in the community, with the knowledge that they can't achieve what they want to on their own; towards that goal, clubs are already working collaboratively with these and other partners in each community."*

**Sandra Morris, Regional Director  
Boys and Girls Clubs of Ontario**

## APPENDIX B: TOOLS AND RESOURCES

1. *Ontario NonProfit Network: Resources for Managing in Tough Times*  
<http://ontariononprofitnetwork.ca/resource/resources-managing-tough>
2. *Charity Village: Tough Times Essentials*  
<http://www.charityvillage.com/cv/guides/guide9.asp>
3. *Imagine Canada*  
<http://www.imaginecanada.ca/>
4. *HR Council for the Voluntary & Non-Profit Sector*  
<http://www.hrvs-rhsbc.ca/home.cfm>
5. *Association of Fundraising Professionals*  
<http://www.afpnet.org/>
6. *NCVO: National Council for Voluntary Organisations (UK)*  
<http://www.ncvo-vol.org.uk/>
7. *National Council of Nonprofits: Nonprofit Economic Vitality Center (USA)*  
<http://www.councilofnonprofits.org/economy>
8. *GEO: Grantmakers for Effective Organizations*  
<http://www.geofunders.org/home.aspx>



The Ontario Trillium Foundation is an agency of the Government of Ontario.

# 10 Tips for Raising Money in Tough Economic Times

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# *Fundraising Success'*

## 10 Tips for Raising Money in Tough Economic Times

At the end of 2008 and well into 2009, everyone was talking about the economy. Americans were feeling the pinch, and trepidation was rippling through the nonprofit sector. Would donors, who already were digging deep to maintain their current lifestyles, dig even deeper to continue to support their favorite charities?

As of February 2009, it was still a tough call. Certainly foundation and corporate giving were down. But individual donors historically have a way of responding to increased societal needs even as their own individual needs get harder to meet. A cadre of new, young donor-activists was awakened by the Barack Obama presidential campaign, and technology continued to open doors to better donor communications and cultivation.

*Fundraising Success* has lots of articles about raising money in tough economic times. And though every writer put his or her own spin on the subject, some themes and best practices did emerge. Overwhelmingly, the message was: DON'T PANIC!

A recession in the '70s and, more recently, the terrorist attacks and anthrax scares of 2001, and major natural disasters such as the tsunami in Southeast Asia and Hurricanes Katrina and Rita on America's Gulf Coast all posed considerable challenges to fundraisers. And in each case, the industry bounced back along with the economy.

"We're all in the same boat, people! This, too, shall pass. The short-term economic outlook might be dire, but an injection of new ideas could put us on the path to recovery before [2009] is out," says Steve Maggio, president and chief creative officer at DaVinci Direct. "And some direct-mail donors become motivated by a poor economy, because it's obvious that more people are hurting. Fundraising programs will rebound with a combination of 'back to basics' direct-mail strategy and an embrace of new media and technology to help us adapt to our changing world."

Following is a roundup of some of the overarching themes that sustained fundraising in 2008 and should continue to do so this year and beyond.

# 1

### **Don't give up on acquisition.**

Even in good times, fundraisers often have trouble defending their acquisition programs, which are notorious for less-than-positive ROIs. In tough economic times, then, severely curtailing them or eliminating them completely might seem like the way to go.

But don't do it. Seriously. The immediate cost-savings might seem like a godsend, but they'll be short-lived.

"For every three donors you don't acquire now, that's one high-producing core donor you won't have three years from now," says *FS* columnist Jeff Brooks, creative director at Merkle. "Think of it this way: If the economy turns around tomorrow, an organization that's been cutting acquisition will stay in its own recession for two or even three more years."

Maggio agrees: "Decreasing new-donor acquisition programs will increase your net income only in the short term. However, not mailing acquisition will cost you next year ... and the year after that ... and the year after that. Your board members might not understand this, but it's your job to explain it to them."

# 2

### **Don't ignore the polka-dotted elephant in the room.**

Your donors aren't stupid. Nor are they ignorant. They know the country is in the throes of a recession. They hear it on the news, they read about it in the papers and, most importantly, they feel it in their own wallets.

Still, many organizations are afraid to acknowledge the economy for fear that it will cause donors to slap themselves on the foreheads and shout, "Wait ... we're in a recession? Oh, no! I'd better rip up this \$50,000 check I was about to mail to my favorite charity!"

Our pros suggest acknowledging the country's economic woes and using them to enlist your donors as partners in continuing your mission.

From Brooks: "When it comes to the economy, your messaging probably falls into one of these categories:

- Because of the economy, the need for our services is extra high.
- Because of the economy, giving to our organization is down.
- Both of the above.
- None of the above (i.e., our nonprofit is based on planet Neptune).

“Tell the truth about the facts you face,” he says. “Openly share any hope those facts make you feel. Truth works. The best approach always is to be real.”

Jeff Jowdy, president of Lighthouse Counsel, agrees, adding that it might help to take it even a step further and seek advice from your donors.

“Be sensitive to the stress many donors are feeling,” Jowdy says. “Communicate more effectively, and work to strengthen existing bonds with your best donors — ask for their advice, and involve them.”

### **3 Don't inundate donors with “emergency” appeals based on the economic downturn.**

At the other end of the spectrum are organizations that are using the recession as an excuse to inundate donors with “emergency” appeals that are overly broad and, eventually, fail to resonate with their recipients.

If you're going to send donors an emergency appeal, make sure it's a real emergency, with very specific causes, solutions and consequences. Don't become the organization that cried wolf.

“In a climate in which donors carefully are weighing need versus want, relevance is everything,” says creative strategist and freelance copywriter Kimberly Seville, who writes the DM Diagnosis feature for *FundRaising Success*. “A budget crisis without serious consequences that speak to donors' priority concerns isn't likely to make the cut when giving decisions are made.”

### **4 Get personal.**

Now is not the time for generic appeals. Well, the time is rarely right for generic appeals. But now more than ever, when competition for the donor dollar is at an all-time high, it's even more vital to make sure donors feel as though you know them, appreciate them and need them.

“Don't forget to do everything you can to personalize your messages,” says *FS* columnist Katya Andresen, vice president of marketing at Network for Good. “Donors are going to be hit up for money left and right by desperate parties this year. If you show you see them as people and not walking wallets, you have a better chance of standing out. Ask them about their interests so you can cater to them.”

### **5 Thank donors often.**

Aside from No. 1 above, this seems to be the issue most fundraising gurus are most passionate about. All the personalization in the world won't make up for the sense of abandonment and puzzlement donors feel when they make a gift and never hear a word about it from the organizations they donated to.

“Say thank you. All the time,” says Jo Sullivan, senior vice president of development and communications for the ASPCA. “People are making harder and harder choices with their money, and their gift may be more thoughtful than ever. Always, always remember that they thought of you when they made the gift — and make sure you think of them when you deposit it!”

Brooks adds, “Treat [donors'] giving with respect. Receipt promptly — 24-hour turnaround is not asking too much. Be heartfelt and genuine with your thanks. And don't screw up their data!”

### **6 Be flexible.**

If you have someone on your donor file, it's because, well, he or she is a donor. Donors like to give. But even the most devoted of them might not be able to write checks as often as they (or you) would like in these difficult economic times. Or maybe the checks aren't quite as large as they have been in the past. But that doesn't mean your donors don't want to help.

“Unless donors specifically tell you they don't want to hear from you or they can't give, you should be asking,” Brooks says. “Assume they want to give, that their giving makes them happy. Recession or not, donors love to donate. Don't let the atmosphere of pessimism and fear obscure that for you.”

That's why it's important to work with donors so they can continue to work with you. You might suggest tiered giving, where donations are paid over time in predetermined intervals rather than all at once. Or monthly giving, where smaller amounts are deducted from donors' credit cards or bank accounts each month.

And even if cash is tight at the moment, work with donors to give them opportunities to help in nonmonetary ways.

“Not everyone can give as they have in more prosperous times. Recognize that fact, and give donors flexibility in how they support you,” Andresen says. “How can they volunteer their time or talents? How can they assist you in spreading the word? Make it easy for people to help, no matter how hard the times.”

Keeping donors and other supporters involved even when they can't give at their previous levels will only make for a smoother transition back to active giving once the economy picks up.

# 7

## **Focus on multichannel.**

Most fundraisers probably have been collecting donor e-mail addresses for at least a few years now. If you haven't, you should be. An organically generated e-mail list is an important start in engaging your donors through a variety of channels.

"Include a URL on each direct-mail package that drives folks who prefer to give online to a unique landing page. The landing page echoes the look and feel of the direct-mail appeal and allows you to measure results," Maggio says. "Test e-mail blasts that focus on specific offers or urgent needs. Test e-mail and phone as a premail setup or postmail reminder for special programs such as monthly donor clubs. SMS, or text messaging, also is being explored by some organizations to engage young people.

"The key to future success will be to integrate the donor data you receive through the direct-mail program with all of your other sources, such as Internet donations, special events, volunteer programs, text messaging, etc., to create a multichannel donor-communication strategy," he adds.

Our pros agree that the more donors hear from you, the better your chance of maintaining your relationship with them. Just be sure that, no matter how you contact donors, you respect their wishes, protect their privacy, and send nothing but relevant information. Nothing will wear out your welcome in their mailboxes and inboxes faster than a series of irrelevant communications for communications' sake, or anything that even hints at the idea that you are unable or unwilling to communicate with them in ways that work for them.

# 8

## **Be transparent and accountable.**

Gone are the days when a donor wrote a check to a charity and then forgot about it until the next time the organization contacted her for more money. Gone, too, are the days when donors gave just because they were asked to give.

These days, donors have almost limitless resources for researching nonprofit organizations and, once they give, they want to know exactly how their money is being used. It's getting easier and easier for supporters to weed out inefficient charities. That's why it's getting more and more important for nonprofits to be transparent in and accountable for their financial decisions and use of donor dollars.

"You need to show you're going to be a very trustworthy, efficient and effective steward of [donors'] money — and there's no better way to do that than to be very concrete," Andresen says. "Where will the money go? What dollars buy what changes? What good is going to result from a gift? Answer these questions many times: when a donor gives, after she gives and the next time you contact her for help."

Maggio agrees: "Accountability is important these days, especially for the younger donors we all covet. Explaining how careful and efficient you are with donors' hard-earned money is helpful. Describe exactly what their donations will do."

# 9

## **Stay positive and mission focused.**

When the economy tanks, fundraisers are faced with a pretty daunting task. And even those of us with the best intentions can't, in good faith, tell you not to worry about it.

But no matter how you might be feeling, the pros suggest that you avoid spreading messages of gloom and doom all over your donor communications. Focus on all the good your organization is accomplishing, and pepper your donor communications with stories of the people or causes that you (partnered with your donors) have helped. And whatever you do, don't let the economy turn you, your organization or your fundraising into shrinking violets.

"Maintain positive, mission-focused leadership," Jowdy says. "Donors will continue to respond to bold visions with shared values that transform lives and communities. Stay positive, and don't focus on the current economic fluctuations.

"Share life-changing opportunities. People want to be a part of something larger than themselves, leave a legacy and make a difference," he says. "If we are timid in inviting donors to invest, they'll follow our lead. Keep sharing your story."

# 10

## **Be innovative.**

While your first instinct might be to find a little hole and hide yourself away from the whipping winds of economic turmoil, our pros think that's exactly what you shouldn't do.

Now is a good time to get creative, to get innovative. Try out some new ideas, some new strategies — especially online where the cost of entry is minimal and where there are throngs of new, young donors just waiting to meet you. Can't come up with something particularly innovative in-house? How about swiping from other organizations that are seeing the kinds of results you'd like to see and have already laid the groundwork with their own creative thinking?

"You can't make fear go away just by waving a wand," Brooks says. "You may need to just pretend you aren't afraid and act like you're not. By doing that, you'll make your courage grow."