

CASE STUDIES:

HOW CANADIAN GRANTMAKERS CAN HELP LEAVE A LEGACY OF ENHANCED VOLUNTEERISM

The year 2001 has been designated the International Year of Volunteers 2001 (IYV 2001) by the United Nations. IYV 2001 provides an opportunity for Canadians to celebrate and promote volunteerism and to expand their knowledge and understanding about the value of volunteerism.

While Volunteer Canada and the Government of Canada are the lead organizers of IYV 2001 in Canada, many other national and local groups are also participating and contributing to the success of IYV 2001. United Way of Canada – Centraide Canada and Community Foundations of Canada, with their combined membership of 235 organizations and their shared values of strengthening communities through voluntary action, have joined forces to broaden IYV 2001 engagement among the country's grantmaking organizations. This collection of three case studies is part of this initiative. It was developed to stimulate thought about how grantmakers can help leave a legacy of enhanced volunteerism across the country.

These case studies look, in turn, at initiatives by a community foundation, by a United Way – Centraide, and by a private foundation. The community foundation example explores a collaborative effort in Red Deer (Alberta) to address the renewal of volunteer leadership community-wide. Corporate volunteering and the lessons learned in implementing a new program are the focal points of the example from the United Way of Fraser Valley (British Columbia). And meaningful youth engagement at the Board level is the central theme of the contribution from The Laidlaw Foundation (based in Ontario). All identify key success factors, challenges and learning from the perspective of the multiple partners and players involved. For further details on the implementation of these initiatives, contact the organizations involved (contact details on page 29).

We hope these stories inspire and inform your efforts to enhance and broaden volunteer engagement in your own community.

David Armour
President
United Way of Canada – Centraide Canada

Monica Patten
President & CEO
Community Foundations of Canada

THE LEADERSHIP CENTRE OF CENTRAL ALBERTA

GENESIS OF A COMMUNITY-WIDE APPROACH TO A COMMON CONCERN

IN BRIEF

Like many communities, Red Deer's organizations were experiencing volunteer burnout and lack of renewal in their volunteer leadership. Questions about where new leadership would come from and how it would be nurtured and trained were common concerns in the community. Organizations were dealing with the issue alone.

Led by the Red Deer & District Community Foundation, Red Deer College, and the Community Information & Referral Society, the community was invited to work together to tackle the issue of leadership on a community-wide basis. The Leadership Centre of Central Alberta, launched in 2000, developed from a process of community consultation and widespread participation that began in 1997.

This case study describes that process, and identifies key success factors, key challenges, and key learning from the perspective of three lead players.

VOICES OF EXPERIENCE

Three organizations shared the leadership of this project. This case study includes the perspectives of three key players, in their own words:

Joyce Ganong, Executive Director, Red Deer & District Community Foundation

Ron Woodward, President, Red Deer College

Stephen Soucy, Executive Director, Community Information & Referral Society

THE CONTEXT AND THE ISSUE

Red Deer is a city in central Alberta, midway between Edmonton and Calgary, with a population of 64,000. The surrounding region has a population of 200,000 in approximately 30 communities including several First Nations communities. The region is growing at a fast rate. It is a mix of rural and urban living with a prosperous economy based on agriculture, the petrochemical industry, technology and services of all types. It has the highest percent of entrepreneurs/small businesses, per capita, in Canada.

Red Deer's very active voluntary sector includes more than 220 organizations, each with between 50 and 100 volunteers. Most volunteers contribute two to four hours per week.

Like in many communities, the broad and complex voluntary sector in Red Deer was encountering challenges related to leadership. Renewal of leadership, leadership training, and leadership skills were of increasing concern to many organizations. Although training opportunities were occasionally available in the community, they were not coordinated or continuous and not always widely affordable. Volunteer burnout was a common experience.

JOYCE GANONG, EXECUTIVE DIRECTOR
RED DEER & DISTRICT COMMUNITY FOUNDATION

When asked for the strengths of our City, people from Red Deer will consistently respond: 'Our spirit of volunteerism' and 'Our trail system'. From the rest of Central Alberta, the responses may differ slightly, but always there is a comment about the strength of the community. We, in Central Alberta, already have an asset of social capital.

However, cracks are appearing in that strength. Non-profit organizations are concerned about volunteer burnout. Large events such as the Alberta Winter Games are attracting fewer volunteers. The community is growing. The need for community services is increasing. At the same time, government intervention is decreasing. The need for volunteers is increasing.

But are we using our volunteers wisely? Is volunteering an empowering experience, one that validates the experience of community involvement?

Within individual organizations, it is possible to develop a culture of empowerment, to encourage leadership initiative at all levels, and to provide skill development opportunities. Is it possible to regard the community as an organization and to act accordingly?

STEPHEN SOUCY, EXECUTIVE DIRECTOR
COMMUNITY INFORMATION & REFERRAL SOCIETY

Like most communities, we are looking ahead to an increasing population of seniors. We need to be planning for the future. Our region has four or five very high profile events, new neighbourhood associations are developing. Who is going to help with that leadership prospect? And the corporate sector is trying to address leadership as well.

A RESPONSE DEVELOPS, STEP BY STEP

THE SEED

Red Deer & District Community Foundation (RDDCF) has been engaged in a series of conversations with the community since 1997. Two particular conversations sparked the leadership initiative:

1) RDDCF is a member of the local Funders Forum, a grouping of major grantmakers in the community. One of its objectives is to help local organizations build their capacity to serve the community. After consulting more than 50 people representing local not-for-profit organizations, the Funders Forum recognized the need for a common application form, one which would eliminate the duplication and re-stating of objectives, financial information, etc. that was wasting the time and energy of grantseeking organizations. The Forum developed that common application form. In the course of those consultations with community groups, RDDCF heard other themes over and over again: that volunteers were “burning out” and that new volunteers were not coming forward; and

2) A similar set of concerns arose from RDDCF’s convening, with United Way of Central Alberta, a “The Society We Want” dialogue in 1997. (These public meetings, supported by the Canadian Policy Research Networks, stimulate discussion on community values and help communities explore local social priorities.)

Simultaneously, a new President, Ron Woodward, had arrived at Red Deer College, and was reaching out to learn about the community’s strengths, priorities and concerns. In late 1998, as part of regularly scheduled dinner meetings he and the College Board hold four or five times a year with community groups, the issue of leadership began to emerge. He heard clearly, from sport associations in particular, that leadership development was a serious gap in Red Deer’s ongoing educational opportunities. The College decided to put a group of people together to develop a program that would focus on sport leadership.

Ron Woodward and Joyce Ganong met socially and discovered they shared concerns about their community’s leadership development. They agreed to work together to explore how the community could respond.

BROADENING THE CIRCLE

Red Deer’s business, private and public sector had a history of collaboration that made the next steps easier. “Partners in Education” had been active since 1995 – a group representing business leaders, the school boards, the Chamber of Commerce, the College, and the Community Foundation. They had organized successful community forums engaging more than 100 people around issues such as lifelong learning, creating a technologically-connected community, and establishing a lending library of computers (the first in Canada). The profile of RDDCF and the College were high. To engage the community in this new initiative, they decided to convene a community forum.

When you talk about Red Deer, you’re really talking about a region. People have a regional view of things. In Central Alberta we have become well known for working as a region. (Stephen)

Red Deer & District Community Foundation believes in partnerships. The five stated values of RDDCF are: stewardship, partnerships, volunteerism, empowerment, and proactivity. In 1998 RDDCF's Board also formally adopted Community Foundations of Canada's proposed Principles for Community Leadership which include partnership, capacity building, accountability to the community, and diversity.

THE COMMUNITY FORUM, JUNE 1999

On May 10, 1999, invitations were sent to about 40 organizations and individuals in the community, including many people who had been involved in the community consultations and joint initiatives outlined above. The invitation gave background on the challenge of developing, sustaining and growing leadership capacity in Red Deer. It asked the recipient not only to attend himself or herself, but also to bring an emerging community leader who "exemplifies leadership qualities, who has worked 'in the trenches', who will bring new or different perspectives" to the discussion. The invitation outlined "six specific discussion points which build on the solid foundation and reputation of community leadership in Red Deer:

- Develop a common understanding of community leadership
- Develop a vision of leadership in our community
- Understand the issues and challenges facing you, as community leaders, and identify the commonalities across various sectors
- Confirm if there is desire to move forward on a community-wide leadership development initiative, and key organizations that should/could play a role
- Confirm if there is a need and a desire for a Leadership Institute at the College
- Where to from here? Assess commitment, partnership opportunities, and the diversity for an Advisory Board to continue the initiative."

The forum was a huge success, attracting 50 people representing sport, community services, education, social services and business. Youth and aboriginal leaders also attended. Discussion was broad ranging and passionate. The group examined leadership from a variety of perspectives, including aspects unique to specific disciplines and skills needed to support strong community leadership as a whole. Consensus emerged on a number of issues:

- As a community, Red Deer should be developing its leadership capacity
- Leadership means different things to different people. Leadership development needs to be done in a variety of ways.
- The leadership development initiative should use a community development model that identifies, builds on and celebrates the wealth of leadership experience in Red Deer. It should be a model of collaboration and community ownership, integrating community relationship building, issue identification and solution-finding into its approach and design.

RON WOODWARD, PRESIDENT
RED DEER COLLEGE

We had a wide and diverse group of 50 or 60 people -- community groups, educators, business people — that spent the day looking at these issues. An excellent facilitator worked us through the questions. We ended up with a framework that guided us for the next year or so.

A philosophy of leadership also began to be articulated. The group embraced the idea that leadership is empowering and leadership skills are critical to sense of community. Leadership development affects all sectors of the community and is a key component in building social capital. In a context where traditional social networks are weakening (people having gone to the same schools, for example), leadership development is one way to “fast-track” network development. They grounded their work in the belief that each person should view himself or herself as a leader in some venue and that everyone is a volunteer along with his or her other roles.

At the community forum, three organizations agreed to move the initiative forward: Red Deer & District Community Foundation, Red Deer College and the Community Information & Referral Society. Along with their CEOs, the Steering Committee included representatives from the School District Consortium, the business community, and the City of Red Deer. The people on the Committee, however, also brought other links, for example to the health, social services and recreation sectors, and the aboriginal community.

Three weeks after the forum, participants were sent a summary of the meeting prepared by the facilitator, along with a letter outlining the next steps.

Coincidentally, the College’s athletic director, Allan Ferchuk, had scheduled a sabbatical to work on the issue of sport leadership. As the possibilities of this new leadership initiative developed, his mandate was broadened to include community-based volunteer leadership. He began his sabbatical in July 1999 and spent most of one year supporting the investigation, development and initiation of leadership development approaches.

Two distinct types of leadership were identified at the forum: for some, leadership (voluntary and other) lay with people in positions of power or trust. Others recognized leadership at all levels of an organization. Furthermore, subsequent research noted that existing leadership development opportunities in Red Deer:

- Were not coordinated with one another, therefore offering no continuum of development
- Did not link personal development and organizational development
- Were not affordable or accessible to the voluntary sector
- Were not cross-sectoral, cross-generational or cross-cultural and therefore did not reflect the reality of the community

- Were not multidimensional, combining instruction, networking and mentoring.

BUILDING A VISION

Arising from these observations, their philosophy of leadership, and the community development model they had chosen to work within, the steering committee made a priority of articulating common goals and principles to guide their work. It established its vision, mission and objectives. The process (a series of meetings and lively debate) was time-consuming, iterative and at times frustrating. But it also helped to pull the group together, uncover differences in points of view, promote discussion of core issues, and eventually achieve a product in which all participants were invested. The statement of vision, mission, and objectives now forms part of the initiative's background document. (See box below)

LEADERSHIP EXCELLENCE IN CENTRAL ALBERTA

Vision
Central Alberta is a centre of excellence for leadership development and for the continued support of leaders.

Mission
To provide leadership education, training and support systems for ongoing leadership development for people within volunteer organizations, community agencies, youth, business and other constituencies, targeting, but not exclusive to, Central Alberta.

Objectives

- The objectives are being established through the work of the Steering Committee. The key principles that will serve as the foundation for the objectives are the following.
- Leadership skills need to be developed within individuals and within organizations.
- Duplication will be avoided through coordination.
- A stronger community will emerge through cross-fertilization of ideas, therefore, wherever possible the diversity of the community will be reflected in the initiatives.
- Mentoring and networking are critical components to effective leadership development.
- Emerging leaders are one obvious pool of talent, but we will not limit our focus to this group.
- Affordability is critical to the success of the initiative.

MCCONNELL PROGRAM INFLUENCES DEVELOPMENT

In October 1999, RDDCF was invited to participate as an observer at the Common Threads Leadership Orientation in Vancouver, hosted by the J.W. McConnell Family Foundation and Leadership Vancouver. That community's experience, then five years old, pointed to the importance of community consultation in developing the curriculum of a leadership development program.

FROM STEERING COMMITTEE TO ADVISORY BOARD

Over a period of months, the steering committee grew. In August 1999, The Mayor of the City of Red Deer, the CEO of the Regional Health Authority and other business leaders joined the group. By May 2000, it had evolved into an Advisory Board, chaired by Joyce Ganong.

RED DEER & DISTRICT COMMUNITY FOUNDATION LEADERSHIP FUND

RDDCF was asked to establish a Field of Interest Fund for Leadership Development. It was launched with a \$5,000 gift in December 1999 from an individual involved in the project. Fund development will be part of the ongoing program development. Through bursaries, the fund will provide access to the leadership program for people otherwise financially unable to participate.

PUBLIC LAUNCH AND REPORT TO THE COMMUNITY

The Advisory Board recognized that the community was anxiously awaiting a progress report, and there were areas where work could begin. They decided to hold a public launch event on April 26, 2000. Community leaders and media from across the region were invited to learn about the progress of the leadership initiative and to provide input. Names of volunteers were collected. The local media turned out in numbers, generating extensive radio, television and print coverage.

COMMUNITY RESEARCH CONSULTATION

With a community leadership development grant to RDDCF from the Walter and Duncan Gordon Foundation through Community Foundations of Canada (the membership organization for Canada's 100+ community foundations) the Steering Committee hired consultants to talk to community organizations about leadership needs and training priorities. Through the summer of 2000, interviews were held with 73 individuals in 10 organizations within the Red Deer non-profit and volunteer sector. Seven questions formed the basis of the interviews. They touched on leadership qualities, skills, cultural differences in leadership, and renewal, support and development of leaders. One of the major findings was that a curriculum for volunteer leadership development needed to include more than leadership skills; leadership qualities were stressed more than skills. The report was presented to the Advisory Board in August 2000.

It was seen as important for new leaders to watch existing leaders to develop confidence, gain inspiration and take on projects for experience. It was also important *that people be asked to lead*.

**Leadership Development Community Consultations Report
WB Consultants, Red Deer**

THE PROGRAM

The resources of all the partners were stretched very thin at this point. Fortunately, through the efforts of the Red Deer & District Community Foundation, a grant of \$40,000 was found from an anonymous donor to assist with the program development stage and development of a program model continued into 2001.

One factor in our early success was the commitment of dollars through the community foundation and from the College. It was critical in getting things going. And it also sent a strong message to the community about the importance of this work. (Ron)

The leadership initiative has evolved into a plan for four streams of leadership development:

- 1) community leadership;
- 2) youth leadership: this arose from the Health Region's involvement in Healthy Communities and is attracting support across the community;
- 3) sports leadership: in response to the community's realization that children's involvement in sports drops off at age 12 or 13 and doesn't recur until they are parents, this program will try to keep them involved. It will also develop adult volunteers in leadership roles;
- 4) business leadership: this has been the slowest stream to develop.

The streams are grouped under the name "The Leadership Centre of Central Alberta."

Red Deer College made a decision to formalize this thing into what we call the Leadership Centre. It is set up as a stand-alone, not-for-profit society, rather than a program of the College. That was a deliberate decision on our part, to help the community take strong ownership of it. (Ron)

THE COMMUNITY LEADERSHIP STREAM: AT THE END OF THE BEGINNING

The community leadership stream, called Leadership Central Alberta, will begin its first ten-month program in September 2001, bringing emerging leaders together from the private, public and not-for-profit sectors throughout Central Alberta. The program includes community projects, weekend retreats, and one-day intensive forums with local experts. It is being supported financially in part by the J.W. McConnell Family Foundation and is developing on the McConnell leadership initiative model known as "Common Threads."

When is the end of the beginning? It's when the core group of people is ready to pass the project over to the broad community. Our committees are established and volunteers are in place. The work has been done around philosophy, vision, mission. (Joyce)

This case study ends as the community leadership project moves into the implementation stage, after about two years of solid work. In March 2001,

committees are in place for marketing, recruitment and selection, curriculum, evaluation, and alumni. Volunteers are involved on each committee and they are developing their committee terms of reference. An invitation to sponsors is about to go out, asking for their help with three areas:

- 1) curriculum development;
- 2) sponsorship of an "issue day" or community project;
- 3) sponsorship of fees for participants.

The Community Information & Referral Society has taken responsibility for leading the implementation phase of the project.

IN THEIR OWN WORDS: REFLECTIONS FROM THE KEY PLAYERS

WHAT DO YOU SEE AS KEY SUCCESS FACTORS?

*Is there a trend or consensus on the issue, and has the issue been well defined?
(Joyce)*

Are key decision makers sufficiently concerned about the issue to commit personal time and energy? (Joyce)

When you talk about the issue, and potential for resolution, can you generate excitement amongst those listening? (Joyce)

There was a significant community readiness. People were excited about it. They had been thinking about the problem of leadership but hadn't figured out what to do about it. (Ron)

In the sports leadership area, two key people -- Al Ferchuk and Rick Polutnik. Rick had been working with Hockey Alberta, helping volunteers develop ways of operating, defining goals. He made a decision to go out on his own and broadened his training. He helped us slog through the issues and values, working with the advisory committee. His partnership with the College resulted in some early successes. (Ron)

Pure determination. Luckily we were able to draw on people who had different backgrounds, but who had a common history of success. When things got difficult, they just refused to fail. (Stephen)

We were fortunate to be given space early on, from the College. Our agency gave administrative support for the community component such as hosting the community consultation. The group didn't have to waste energy right at the beginning. The infrastructure was there. (Stephen)

The other strength, of course, was that it's a good idea. (Stephen)

WHAT WERE THE BIGGEST CHALLENGES?

Moving through a community development process with the key decision makers, to help them bring their 'big thoughts' to consensus on vision, mission, goals, objectives. (Joyce)

Finding staff support able to listen at the 'big thinking' level and develop strategies to achieve those lofty goals. (Joyce)

Keeping the energy going. The process can be long for three reasons: Community Development is a messy business; key decision makers are busy people and to accommodate their calendars, meetings often have to be spaced far apart; and as new people come on-stream, they contribute new thinking that has to be worked into the process. (Joyce)

Melding the volunteer governance of a burgeoning new organization with a paid position. Sorting out who looks after what, and trying to do everything at once. (Stephen)

The whole issue of defining who we are and what we wanted to do. Most of us would be considered leaders in the community – so we know about leadership, right? But as we kept peeling back the onion... what would success look like, what values would we adhere to... we all came from slightly different perspectives, with different agendas. (Ron)

Staffing is a challenge. It's hard to find people who have an understanding of the development of leadership programs that you can hire, quite frankly, for the kind of dollars we have available. (Ron)

WHAT ARE THE MOST SIGNIFICANT LEARNINGS?

As always, the challenges create the learnings. Paying attention to funding for sufficient, competent staff is essential for success. Volunteers cannot do everything. (Joyce)

When there is sufficient energy behind an initiative, it is possible to release it to the next stage of development - bringing in a broader base of volunteers. If we hadn't spent the time as a core group of key decision makers, developing a common understanding of what we wanted to achieve, we wouldn't be able to give life to the committees now. For example, we already have several organizations wanting to be founding sponsors. As another example, we have very competent, very creative curriculum developers and leaders putting their expertise together to develop the curriculum. (Joyce)

Leadership on the initiative moves from partner to partner, depending on the requirement. RDDCF was able to offer chairing and sourcing of funds. Community Information & Referral Society has the volunteer networking capability to move us forward through the committee work. The College could

provide start up staff and space. The other key members are using their sphere of influence to seek out sponsors. (Joyce)

Something I know, but need to be reminded of constantly: You have to let things evolve, and you have to be patient. Especially with something like leadership. (Ron)

I was really struck by the power that exists in our community of people who are leaders, and the commitment they have to helping others develop their skills. (Ron)

It changed my life! I was new to this job, although I have lived in the community for 20 years. I got to work with people I learned a lot from. About leadership, patience, building consensus, team-building, diplomacy, listening – all kinds of skills. It was a great experience. (Stephen)

REACHING OUT TO PROMOTE CORPORATE VOLUNTEERING:

UNITED WAY OF THE FRASER VALLEY, DAYS OF CARING 2000

IN BRIEF

Days of Caring is a program developed by the United Way of America in 1987 to promote corporate volunteering. United Way of Canada – Centraide Canada began to promote the program to its members in 1994. Since then, it has been implemented in different ways in different local communities in Canada. British Columbia's United Way of the Fraser Valley launched its first Days of Caring program in September 2000, in conjunction with the Fraser Valley Volunteer Centre.

This case study outlines the steps the United Way of the Fraser Valley took to implement this very successful corporate volunteering initiative. It identifies key success factors, key challenges, and key learning from the perspective of three participants.

VOICES OF EXPERIENCE

This case study includes the perspectives of three participants, in their own words:

Joelle Bremner, Director, Volunteer Services/ Community Relations, United Way of the Fraser Valley

Stan Duckworth, Executive Director, Aldergrove Neighbourhood Services – an agency that benefited from the programme

Robyn Gordon, Sales Assistant, Merrill Lynch – a business that supplied volunteers

THE CONTEXT AND THE ISSUE

BACKGROUND

Days of Caring was started in 1987 by United Way of America as a program to promote corporate volunteering. It is designed to place United Ways in an intermediary role between social agencies and corporate volunteers in their communities. Though implemented differently in different communities, the goal of Days of Caring is to promote the idea of volunteering and to match corporate volunteers with opportunities in the community.

In 1994, United Way of Canada – Centraide Canada began to promote the program to its members. Approximately 15 communities in Canada now have Days of Caring initiatives. The United Way of the Fraser Valley launched its program in 2000; this case study examines their experience initiating the program.

A UNIQUE RELATIONSHIP

The Days of Caring program is built around collaboration between local United Ways and their corresponding Volunteer Centres. In the Fraser Valley, this relationship is unusual -- the Volunteer Centre is a program of the United Way, rather than a member agency. The Centre is funded jointly by United Way and provincial and federal governments. But in most communities, the volunteer centre is an independent agency that partners with the local United Way to implement Days of Caring.

JOELLE BREMNER, DIRECTOR, VOLUNTEER SERVICES/ COMMUNITY RELATIONS
UNITED WAY OF THE FRASER VALLEY

For us, it was really natural to look at Days of Caring because of our unique model with the Volunteer Centre as a program of United Way. It was another way for us to raise awareness of what the United Way can provide and what the Volunteer Centre is doing in this community.

STEP BY STEP

The United Way of the Fraser Valley began talking about Days of Caring early in 2000 but a decision was not made to adopt the program until the summer. They decided to use it to kick off their fall campaign, which in previous years had been launched with reception parties throughout the valley. Having made the decision to hold Days of Caring from September 11 to 17, they had approximately eight weeks to organize the program. They set a target of 12 projects.

ADAPTING MATERIALS AND GETTING THE WORD OUT

The United Way of the Lower Mainland has developed a toolkit for Days of Caring in the province of British Columbia. The Fraser Valley looked to that resource for document templates and other guidance.

Two application forms were developed, based on the Lower Mainland model, one for social agencies and the other for businesses:

1) The application for non-profit organizations described the program as “an opportunity for agencies to work together with company volunteers to demonstrate care and concern for our communities.” It asked for information about the agency, the specific project and its impact, any supplies or materials required to complete the project, and the number of volunteers needed and their skills. Projects were limited to a half-day or a full day in length and could include five to 20 volunteers. The opportunity was presented to all agencies in the community, not just United Way

member agencies, and was sent to them by mail and fax in July. The deadline for proposals was August 17, 2000.

2) The corporate application form asked about preferred types of projects, number of employee volunteers available, their skills, time available and whether the company could also offer any supplies or materials. It was distributed to company supervisors, managers and owners during the months of July and August.

STAN DUCKWORTH, EXECUTIVE DIRECTOR
ALDERGROVE NEIGHBOURHOOD SERVICES

The application form was fairly simple and the follow-up process, dealing with the company, was really easy.

ROBYN GORDON, SALES ASSISTANT
MERRILL LYNCH

We were already United Way supporters. They contacted us about Days of Caring and since it involved man-hours, not corporate financing (which requires paperwork and approvals at the corporate level), I was able to just ask around our office. I got a sense of support and decided to get involved.

SELECTING PROJECTS

The response to the call for applications was positive. More than 20 applications were received.

A list of criteria for projects and a rating system were established:

“Criteria for Days of Caring Projects

- 1) Projects must be able to be completed in a day.
- 2) Projects must provide an opportunity to connect the volunteers to the work of the organization.
- 3) Projects should be fun and interesting.
- 4) Projects should be a new initiative and should be innovative.
- 5) Volunteers should have a visible impact at the project and feel that they have made a difference to the organization and the clients they serve.

Rating Systems for Projects

- **A rating** – projects received unanimous support and meet the criteria.
- **B rating** – projects were a possibility but needed to have further clarification and review before they could be moved to the A rating.
- **C rating** – projects did not meet the criteria and were rejected.”

All projects were evaluated against the criteria and eight were selected. The United Way also checked risk management issues, such as Workers Compensation and liability insurance.

MATCHING PROJECTS AND VOLUNTEERS

The matching process was mostly “self-matching” with agencies and companies proposing their own partnerships. The United Way drafted sample agreements and ensured that Letters of Understanding were signed by all parties. The letter outlines the parties (company, agency, Volunteer Centre, and United Way), identifies liaison people, responsibility for cancellation or changes, purchase and/or delivery of any materials, meals, orientation, evaluation and other details.

Projects ranged from building a toy and tool shed for a neighbourhood daycare centre (BKN Renovations), to teddy bear family picnics for children with disabilities (Royal Bank), to school tours of a local historical museum (Abbotsford Chamber of Commerce).

As it turned out, most of the agencies and businesses really took ownership of the process. They put together their own matches and then submitted their applications to us. (Joelle)

About 12 or 15 of our staff participated – out of an office of 22. We had a good group. We all did a half day, from 1 to 4 pm. (Robyn)

MEDIA COVERAGE AND PROMOTION

The United Way of the Fraser Valley designed a detailed media campaign specifically for Days of Caring. They struck a partnership with the Metro Valley News Group which comprises five community papers (Abbotsford News, Mission City Record, Chilliwack Progress, Hope Standard, Agassiz Observer) and established a timeline (from August 5 to September 23) for regular coverage every weekend. Ads were developed for each week, projects were profiled, and coverage built up to a one-page insert in the final week which highlighted the results of the program.

A news release on August 21 announced the Days of Caring campaign, sketched a few of the approved projects, and invited participation from businesses and corporations. It was sent to media, agencies, and corporations. Staff also wrote short profiles (one half page) of seven projects. These were used in newsletters, press releases and recognition activities.

The Days of Caring media promotion was integrated with the United Way’s overall fall campaign media plan, which continued into January 2001. The wrap-up of Days of Caring formed the launch of the United Way Campaign 2000.

FUTURE PLANS

The United Way of the Fraser Valley was very pleased with the results of their first effort at Days of Caring and has decided to repeat it in 2001, with some major changes:

- they will start their planning earlier (preparation for Fall 2001 was already underway in April)

- they will extend it from one week to a full month. They found that coordinating all the activities in one week was too intense and hope that expanding the timeframe to a month will be more manageable
- they will work at the provincial level to secure corporate gifts in kind for supplies required in some projects (paint, building materials, etc.). In the short time frame of their first year, United Way had difficulty securing supplies at the local level.

They have doubled their target for 2001 to 15-20 projects.

IN THEIR OWN WORDS: REFLECTIONS FROM THE KEY PLAYERS

WHAT DO YOU SEE AS KEY SUCCESS FACTORS?

We had a good relationship with the media. They really wanted to run with this. (Joelle)

For us, the success was that a local construction company took on the project. There was very minimal work from the agency point of view and we now have a great-looking storage shed. The outdoor play equipment that was being stolen from one of our child care facilities is now secure. (Stan)

The most successful thing about it was that it was something people could do without pulling out their wallets. They could participate and support the United Way without turning over any cash. For a lot of people that was really important. (Robyn)

WHAT WERE THE BIGGEST CHALLENGES?

For us, the biggest challenge was the time limit. Agencies couldn't plan out projects in time. (Joelle)

We had some problems getting discounted materials and physical support for projects. We tried some construction supplies companies, but there was a lack of response. We were rushed and we may not have presented the case as well as we could have. We've formed a provincial group for Days of Caring to build support from the head office of companies, at the provincial level. (Joelle)

We didn't exactly do the work we had expected to do. Our work changed once we got there ... but it was the help they needed at the time, so we were happy to pitch in. (Robyn)

WHAT ARE THE MOST SIGNIFICANT LEARNINGS?

For future years, it might help if there was a short, face-to-face meeting between the agency, the United Way and the company, to clarify all our expectations. We talked a lot on the phone, but a meeting might have been a good thing. (Stan)

We had a lot of interest from agencies, and we thought about continuing it for one day each month. But we realized it was too much to coordinate it month after month. So we've decided to do one full month of Days of Caring and not limit it

to a day or a week. We found that everybody is terribly busy, and trying to coordinate everything in a short period is impossible. (Joelle)

“We’re starting now [April] for next fall.” (Joelle)

A PRIVATE FOUNDATION ENGAGES YOUTH IN ITS GOVERNANCE:

THE LAIDLAW FOUNDATION EXPERIENCE

IN BRIEF:

The Laidlaw Foundation, a private family foundation granting close to \$3 million annually, has embarked on a process of engaging youth in its internal governance structure. This initiative is separate from, though informed by, its programme area in youth engagement. The foundation now has four years' experience with young people from the community participating as full members of its Board of Directors and advisory committees.

This case study outlines the steps the Laidlaw Foundation took to implement their commitment to youth involvement in their governance structure. It identifies key success factors, key challenges, and key learning from the perspective of four lead players.

VOICES OF EXPERIENCE

This case study includes the perspectives of four key players, in their own words:
Nathan Gilbert, Executive Director, Laidlaw Foundation
Deborah Senior, Board Member (one of two youth members)
Joyce Zemans, Past President (President when the initiative began)
Violetta Ilkiw, Programme Coordinator -Youth Engagement Programme

THE CONTEXT AND THE ISSUE

THE FOUNDATION'S HISTORY

The Laidlaw Foundation was established in Ontario in 1949 with a \$50,000 gift from Mr. Robert A. Laidlaw, the President of the R. Laidlaw Lumber Company. Since then, with further support from family members, the foundation has grown into one of Canada's major public-interest foundations. Its assets were more than \$66 million in 2000 and annual grants approached \$3 million.

The Laidlaw Foundation is proud of its half-century of professionalism, creativity, and sustained curiosity. Its first executive director was hired in 1961, and in 1963 the Board appointed its first Advisory Committee. The tradition of involving distinguished volunteer advisors has been upheld and a commitment to openness,

strategic action, scholarship, and independent evaluation has characterized the Laidlaw Foundation throughout its history.

The Foundation believes, as articulated in its programme guidelines, that “socially engaged youth are cornerstones of a healthy democracy... A healthy democracy needs its youth to know the rights and duties of citizenship. These rights and duties are called civics. When youth act on their knowledge of civics and work to improve their communities, we say that they are socially engaged.” Furthermore, it feels that systemic barriers to engagement must be broken down if youth are to participate fully in society.

NATHAN GILBERT, EXECUTIVE DIRECTOR
LAIDLAW FOUNDATION

Society's attitude toward youth at the moment is increasing intolerance – both for young people themselves and for their perceived failures. Leadership opportunities for young people, particularly those who are marginalized, are rare.

THE LAIDLAW FOUNDATION

Statement of Purpose

“The Laidlaw Foundation is a public-interest foundation that uses its human and financial resources in innovative ways to strengthen civic engagement and social cohesion. The Foundation uses its capital to better the environments and fulfil the capabilities of children and youth, to enhance opportunities for human development and creativity, and to sustain healthy communities and ecosystems. The well-being of children and youth are central to the Foundation’s mission. A life-chances perspective frames much of the Foundation’s work. This framework recognizes the multiple influences that shape the social prospects and life outcomes of children through predictable developmental transitions. The Foundation has adopted an interactive approach with organizations and agencies in the charitable, public and private sectors. It has selected activities in which it believes that progress is possible and in which outcomes can be sustained.

The Foundation currently focuses its grantmaking in three areas – the Arts, the Environment and Improving Outcomes for Children and Youth.”

A PHILOSOPHY OF YOUTH ENGAGEMENT

The Foundation’s current commitment to engaging young people in its governance has roots in the institution’s early years. Beginning with family members, the Laidlaw Foundation has traditionally had a measure of youth input into its governance. Two of the founding trustees, Mr. R.W.L. (Rod) Laidlaw and Mr. R.G.N. (Nick) Laidlaw, began their Board tenures at ages 27 and 31 respectively. They both served as President for various periods between 1949 and 1990. In 1974, three grandchildren of the founder were asked to form a Family Committee “to have the opportunity to develop [their] ideas unhampered, but supported by the present infrastructure.” The commitment to engage younger Laidlaw family members in the

work of the Foundation remains strong. At the staff level, the first executive director was 31, and the current executive director 30, when they were hired.

The present initiative builds on that openness to the voice of youth and pushes it beyond the known circle of family and staff.

The family continues to play an important role in the Foundation, and three seats on the Board are set aside for appointments from the family. But since 1971 the majority of the Laidlaw Foundation Board has been drawn from the community and over the years the membership of the Foundation's Board and advisory committees has become more reflective of the gender, colour and age of the community. (Nathan)

STEP BY STEP

Growing from that philosophy of youth involvement are two recent parallel thrusts at the Laidlaw Foundation: a new programme area called Youth Engagement, and an internal plan to bring youth into the foundation's governance. Both thrusts began at approximately the same time and have gathered four years of experience.

RECRUITING YOUTH TO THE BOARD OF DIRECTORS

In 1996, the Laidlaw board held a retreat at Wilfrid Laurier University to consider its strategic plan. A theme that emerged from those discussions was concern that young people did not seem to have the same opportunities to be heard in public life as they had had in decades past. Increasingly, an undercurrent in society portrayed youth as liabilities rather than assets. Although research on early childhood development was driving a flow of resources to the critical early years, not much focus was being placed on young people in their teens and early twenties.

The Laidlaw board had been gradually diversifying and realized that it benefited from the wisdom of many different perspectives -- but seldom heard input from young people. It decided to actively recruit young members. Having learned from the literature on youth engagement that a certain critical mass was essential, they created two positions on their Board (rather than just one) specifically for youth and expanded the Board from 10 to 12 members. Board members agreed to mentor and nurture the eventual new youth members.

JOYCE ZEMANS, PAST PRESIDENT
LAIDLAW FOUNDATION

The 1996 board retreat was critical. The Laidlaw Foundation had had a commitment to young people historically, and we were focused on the theme of youth at risk. We asked ourselves the question: 'If we are truly committed to young people and their needs, are we consulting broadly enough with youth and are we engaging young people in our decision-making?' It was time.

A THOROUGH RESEARCH PROCESS

Criteria for youth candidates were developed by the Board: while age was one consideration, other factors were equally important. In addition to experience in areas relevant to the Foundation's programme fields, the Board looked for the following: a critical and broad perspective and interests, leadership, previous engagement and commitment to their own community, and diversity in race and ethnicity. It was determined that these young Board members would not be "token" members; they would have valuable insight to bring to the board, and they would have the skill and confidence to make their voices heard.

To recruit young people for the new Board positions, Nathan Gilbert, the foundation's executive director, contacted agencies with which the foundation had developed relationships over the years. Nathan and a couple of directors convened a number of dinner hour meetings (with vegetarian food available) with three or four groups of 12-15 young leaders at a time. The people were drawn from the greater Toronto area, were between 15 and 30 years of age and had some association with the West Scarborough Boys & Girls Club – Leaders for Tomorrow Programme, Skills for Change or the St. Stephen's Community House. A short list was developed and the Board's nominations committee met with candidates.

We were looking for young people who would have enough experience and skill to work at the board level. We needed candidates who would feel comfortable enough to participate – and who had experience and a perspective we needed. Youth per se was not enough. (Joyce)

DEBORAH SENIOR, BOARD MEMBER
LAIDLAW FOUNDATION

I was running a national youth NGO [non-governmental organization] called Youth Action Network. I had experience in two areas the Laidlaw Foundation was interested in: youth engagement and the environment. They were also looking for someone from a different class, and I wasn't shy about expressing that difference. (Deborah)

The research and interview process took ten to twelve months. Two individuals were ultimately appointed to the board, each for a four-year term beginning in June of 1997. Like all board members, their terms are renewable once. They are full board members, with the same responsibility and authority as other directors. Both were undergraduate university students when they were appointed, one interested in the law and the other in environmental studies. They graduated with second degrees in 2000. One is male, one is female, and both are people of colour. At the time of writing, they are just completing the initial four-year Board term and are about to commit to another four years. They have made a tremendous time commitment to the Foundation's work.

I was expected to be fully prepared and ready to deliver on all issues. It was a big commitment. (Deborah)

YOUTH INVOLVEMENT ON ADVISORY COMMITTEES

As the Board worked to bring youth into its own governance, it also recommended that the advisory committees for each programme area begin to recruit youth members. The foundation is well known for a network of distinguished advisors who help to build the credibility and expertise of its programme areas (currently the arts, the environment, and children and youth.) Each programme coordinator was charged with finding ways to recruit appropriate young people to join the advisory committee.

VIOLETTA ILKIW, PROGRAMME COORDINATOR – YOUTH ENGAGEMENT PROGRAMME

LAIDLAW FOUNDATION

It's important to understand that the Laidlaw Foundation made a tremendous commitment to this process. Involving young people in governance really is an organizational risk. It needs to be fully supported by Board and staff. Organizational support to help these young people do their jobs, to help them succeed, is absolutely crucial.

ONE EXAMPLE

Violetta Ilkiw, the programme coordinator for Laidlaw's Youth Engagement Programme, joined the foundation late in 1999. Her first task was to renew an interim programme advisory committee that had been appointed the previous year. She began by proposing terms of reference for the advisory committee and outlining the balance between adult and youth members. She developed a basic list of criteria loosely outlining the required skills, geographic parameters, experience and interests of candidates. With those guidelines, she began to develop a list of possible youth candidates. She began by asking the youth board members. Ultimately, she gathered a list of 15-20 names from board members, organizations and other networks. In the fall of 1999, she interviewed each nominee extensively over the phone and then met with about ten of them. Eight were successfully recruited to the programme advisory committee by its February 2000 meeting. Violetta tried to achieve a balance on the advisory committee between those who were experienced in committee work and those who were new to it, and between adult and youth members. She tried to collect a diversity of perspectives. She describes the result as a "healthy tension." The present committee includes eleven people, eight of them under age 25.

With the new committee in place in February 2000, the Youth Engagement Programme worked very quickly. It submitted granting guidelines to the April board meeting, released them to the community in May, received proposals over the summer and fall, reviewed them, and made their first grants by the end of 2000. All their committee members are still with them as they begin a new granting cycle.

Our Youth Engagement Programme works from a positive youth development focus, rather than a focus on risk issues. We look at enhancing the skills and strengths that young people bring. In recruiting youth to our committee, we were committed to making them full members and treating them like all the other advisors to the foundation. (Violetta)

Developing strength and talent and experience – this is a fabulous training ground for youth! (Joyce)

Philanthropy is one of the few sectors where you have the chance to take risks. I can conceptualize ideas and then actually see them implemented. I have the chance to see how decisions are made, and I'm learning how to choose my battles – when to fight and when not to. (Deborah)

CHANGE THROUGHOUT THE FOUNDATION

The Board of the Laidlaw Foundation is more diverse than most other private foundation boards in Canada and its youth members are equal in status and responsibility to other members. All its programme advisory committees have full youth representation. Seventeen people under age 25 are fully involved in various parts of the organization, with as much authority as older participants. A special initiative has also been undertaken to recruit members from the next generation of the Laidlaw family. The voice and experience of youth is informing all decisions of the foundation.

We are better informed. There is a perspective we get only from the young people on our committees. We are richer for it. (Nathan)

IN THEIR OWN WORDS: REFLECTIONS FROM THE KEY PLAYERS

WHAT DO YOU SEE AS KEY SUCCESS FACTORS?

The deep commitment of the Board to involving young people was critical. (Joyce)

Part of the mentoring process involves helping the young people recognize that the other board members really want to hear from them. Sitting quietly is not enough. They have a responsibility to participate. (Nathan)

Putting two of us on the Board at once really helped. We wanted to be more than just the young people on the Board, so we discussed it together and made sure we involved ourselves in other areas, like the investment and the nominations committees. (Deborah)

One key to success is that the incentive for this initiative came from the Board, but it was supported fully by the staff – in principle, but also in practice. The organization has to understand why it wants to do this, and then it needs to provide support throughout the organization. (Violetta)

WHAT WERE THE BIGGEST CHALLENGES?

The real challenge is to make sure you find people who will be able to make a contribution at the Board level. Young people for their own sake would be counterproductive; it would be tokenism. (Joyce)

This is really, really challenging work. It is not always comfortable to move outside the zone of people you already recognize and recruit directors and advisors with whom, on the surface, you appear to have little in the way of a shared history. (Nathan)

For me, the big challenge was establishing legitimacy. You're working with a very powerful Board – university presidents, corporate leaders, and so on – and they don't necessarily all see the value of you being there. It can be intimidating. As a young person you can't compete with their money or career success. You have to establish your legitimacy through your ideas. (Deborah)

Young people want less talk and more action. They want things to move quickly. You may be used to researching and discussing issues at length. There has to be an organizational shift and an openness to risk taking. (Violetta)

WHAT ARE THE MOST SIGNIFICANT LEARNINGS?

We took a long time to do our homework before recruiting youth board members. When you do that, you make sure you use your networks well, to bring an important perspective to the table. Do it well; take the time; interview candidates in depth. (Joyce)

You learn to operate differently. For example, I didn't want to overburden committee members with excessive meetings, so I proposed them monthly. The committee said no, let's go, let's meet every two weeks to establish our guidelines. I had to shift my thinking. (Violetta)

The Board has to want to hear contrary opinions, conflicting views. They need to be ready for diversity – not just of age and ethnicity and class, but diversity of opinion. (Deborah)

Board and advisor recruitment is a continuous activity as the Foundation is forever trying to broaden its reach and impact. (Nathan)

For this to work, I think the organization needs to be one that is really interested in understanding the needs of the community, and that wants to have a Board that truly represents the community. It's not for everyone. (Joyce)

AN ADDITIONAL RESOURCE:

The Laidlaw Foundation sponsored a report on youth engagement called "Youth as Decision Makers: Strategies for Youth Engagement in Governance and Decision-Making in Recreation." The 1999 document, which is available on the Laidlaw Foundation's website (www.laidlawfdn.org), reviews the literature on youth engagement, establishes a framework for exploring youth engagement, looks at four case studies, and provides useful advice to organizations contemplating opening their governance structures to youth.

FOR MORE INFORMATION

To find out more about the initiatives and experiences described here, you may contact the following "voices" from the case studies:

Case Study #1

Janice Wing, Executive Director
Red Deer & District Community Foundation
503 - 4808 Ross Street
Red Deer, AB T4N 1X5
E-Mail: rdcomfdn@telusplanet.net
Tel. 403-341-6911
Fax 403-341-4177

Ron Woodward, President
Red Deer College
Box 5005
Red Deer, AB
E-mail: RWoodward@mercury.rdc.ab.ca
Tel. 403-342-3233

Stephen Soucy, Executive Director
Community Information & Referral Society
4730 Ross Street
Red Deer, AB T4N 1X2
E-mail: stephen-cirs@home.com
Tel. 403-346-4636

Case Study #2

Joelle Bremner
Director, Volunteer Services/Community Relations
United Way of the Fraser Valley
303 - 32071 South Fraser Way
Abbotsford, BC V2T 1W3
E-mail: joelle_uwfv@uniserve.com
Tel. 604-854-1844
Fax: 604-852-2316
Website: www.uwfv.bc.ca

Case Study #3

Nathan Gilbert, Executive Director
The Laidlaw Foundation
365 Bloor Street East, Suite 2000
Toronto, ON M4W 3L4
Tel. 416-964-3614
Fax: 416-975-1428
E-mail: ngilbert@laidlawfdn.org
Web site: www.laidlawfdn.org