

Slide 1: Thanks, and welcome to where volunteers engage. I'm looking forward to being with you through this module. My name is Diane Wiles and I am the CEO of Leadership Waterloo Region. Leadership Waterloo Region runs a 10-month experiential leadership program. So, each year we take a cohort of students through learning their leadership skills, the systems in the community, having a behind the scenes tour in community, and working with the University of Waterloo with the Waterloo Institute for Social Innovation and Resilience on an affordable housing project. So, let's start this session.

Slide 2: We're going to talk about grassroots charities and non-profits. What's the differences, similarities, and how is that language often used interchangeably? We're going to look at social profits and social enterprises, the benefits of partnership, targeting volunteers for specific roles, and the benefits of engaging your volunteers.

Slide 3: What's a grassroots organization? We'll often hear that terminology. Oh, they're just starting out their grassroots or they're a grassroots organization, they don't have those formalities in place yet. So, a grassroots movement is one that uses people in your area. So, we've had a lot of examples. You can probably think of one yourself through COVID. So, there's a need- somebody sees that need, they act on it, and they recruit others that they know or people who are like-minded just to get the job done. So, grassroots are sometimes very complex- not at all, always simple. But they can be local, regional, national, or even an international level. Grassroots organizations often take on big international projects. If you look at some of the more missionary style work or just local, let's get people fed, let's get some toys into a school, whatever that looks like.

Slide 4: All organizations, they spur up when there's a need. So, when somebody sees a need in the community and there's all sorts of needs. Whether it be youth, seniors, if it's something to address basic human needs- housing, food, or if it's trying to arrange community projects so that a community might get cleaned up or have extracurricular for youth. So, there's so many organizations you can probably think of and as we go through this module, I would love for you to reflect and think about some of the organizations in your own community. A lot of pilot projects and prototypes, start off as grassroots there, might not have all of their policies and procedures in check, but they're starting out and moving forward. Fund, fundraising can happen within a grassroots organization, but they're not able to issue their own tax receipts. And as we move on in the module, we'll look further into that.

Slide 5: Organizations, so registered charities, and that means they're registered with the government of Canada- with CRA. Registered charities are organizations, foundations that are created and they reside in Canada. So, they need to reside in Canada to have that charitable number here. All of their resources are used towards their charitable activities. And they have charitable purposes that fall within the relief of poverty, advancement of education, advancement of religion, and other benefits that, other purposes rather, that benefit the community. Now those are predetermined. So, what does your organization do? What are your letters of patent? Or your letters of incorporation they're called. Why do you exist? Your registered charity can issue tax receipts but must always do business along the lines of why

they exist. So, because they're more monitored than say a grassroots organization, every year a registered charity must reapply to have their charitable number reinstated. And that, that has to happen every year by December 31st. And we'll talk about that form later on.

Slide 6: Non-profits like registered charities are there for the benefits of the community. But non-profit organizations or associations, clubs, societies- they're organized and operated exclusively for social welfare to civic improvement, pleasure, recreation, whatever that would be, that, what purpose they're serving in the community. But again, like charity, all their profits go back into the programming that they run.

Slide 7: So, we're going to go through the next, I guess, three slides. We're looking at registered charities versus non-profit organizations. I'm not going to read this verbatim. And some of it we don't, we have already discussed, but this is how Canadian Revenue Agency lays out the differences. So, we've already gone through the purposes of what, uh, why a registered charity and why a non-profit organization. Registration purposes, a charity must apply for registration as a charity. It's actually something that has to be approved on an annual basis and non-profit organizations do not have to go through this process. Charitable registration number is issued to registered charities once approved by the CRA. It's a privilege to have this, and that's why every year it has to be reapplied for. And non-profit organizations do not have that charitable number. Benefits come with having the number and as we talked before non-profit, they're able to carry out more than just their mandate. So, there's benefits on both sides.

Slide 8: If you give a gift to a charity, you will receive an income tax receipt, which you can use as a tax deduction. And non-profits cannot issue those same receipts. We will look at partnership later on and see how there can be partnership so charities can offer a tax receipt on behalf of another organization. So, there's also, when we look at the disbursement quota and spending requirements, charity must spend a minimum amount on its own charitable activities and non-profits don't have that same requirement. So, they don't have to spend a minimum amount. The designation by the CRA as a charitable organization, public foundation, or private foundation. So, you just can't say you're a charity or a registered charity- it's, it's given to you upon application from CRA. And of course, a non-profit doesn't receive that same designation. Every year by December 31st, the return must go in to in essence reapply. So, you have to have an annual information return form T3010 within 6 months of the charities fiscal year end. And there's still paperwork for non-profits. Don't think non-profits don't have any. They have to file a T2 return. If you're incorporated forms 10, T1044, or both within months of the fiscal year end- six months again. So, there's accountability to the government on both sides. Uh, the main difference is one can offer a charitable receipt the other can't. So that may be more enticing to donors, but that's not always the reason people give.

Slide 9: So, on this last slide from Revenue Canada, just to go through quickly- personal benefits to members can happen in either a charitable organization or non-profit. Tax exempt status. So, a charitable organization is exempt, and a non-profit is generally exempt. There are some different restrictions there, but may, a non-profit may have to pay tax on income or on capital gains- and any profits that are made generally taxes have to be paid or may have to be paid. So,

GST and HST- in a nutshell, charitable, charities, non-profits pay it, but you claim most of that back. Most supplies that charities need, you get a hundred percent of that back and the same to supplies for non-profits are also exempt. So, that happens on a quarterly basis. You apply for your HST rebate and any questions again are on the CRA website.

Slide 10: We use all the different titles, a couple of other titles I'd like to touch on are social profits and social enterprises. Often social profits are used now- it's a more desirable language than to say I worked for a non-profit, an NGO, a charitable organization. Often people will say social profits. So, a non-profit or charitable organization are often referred to this way. It's interchangeable language and it comes from the profit socially is to society. So, the work we do is a benefit to society, and that's where the language comes from.

Slide 11: So, enterprise, I love this definition, that the fundamental difference between a non-profit, the charity, a grassroots, whatever you'd like to call it, and a social enterprise is the source of funding. So often social enterprise creates jobs. Right, it's their own business and they generate their own profit to keep themselves running. Now many organizations that are non-profits or charitable organizations will have a social enterprise arm. So for instance, there's a shelter in London where the women there create crafts and sell those crafts- and then that money goes back into the shelter. So, it's building a for-profit arm that will feed the money back into the, the original organization. But social enterprises can exist on their own. They don't need to be part of a charitable or non-profit, and they do bring great benefit to the, to the community.

Slide 12: So, if you think of all the great work that you know of that's happening in your community, I want you to imagine the benefits of joining forces. So, the benefit of a charity and a non-charity partnership. And that non-charity partnership, let's look at non-profits and grassroots organizations. So, I'm going to give you an example of a story I know of there was in our community a, a basketball program had started for some youth, and they were considered to be youth that were maybe at higher risk. Given the Canadian climate, this basketball program was looking for a facility they could use on a regular basis to offer basketball training and games. But they needed somewhere indoors, of course. So, who better than the YMCA? So, this program approached the Y and said for a discounted rate, would you be able to, to house our program so we can come once a week and use your courts? And, and it worked out it and the Y was open to that. And then it came that the, the team needed jerseys, they needed other equipment. And so, they made a partnership with the Y for equipment. So, the donation that came in for this small basketball program were actually receipted from the Y. So they went into the Y, the Y bought all the new equipment, and the donors receive a charitable receipt. How did that benefit? Well, first of all, it benefited the small basketball team because they were able to offer tax receipts, fundraise, and have the legitimacy of the Y. It benefited the donors because the donors received a charitable receipt and they wouldn't have received that receipt without the partnership from the Y. And the Y benefited from this program because the healthy communities and sports teams and all of their other missions were in line with this non-profit. The equipment they bought not only was the team, the smaller team able to use that, but the regular Y members were able to use that as well. So, it

was a real benefit all the way around. Again, charities have standards to which they must report on and to which they're accountable to. So, how did this partnership line up? One, the smaller non-profit team, their values, and mission aligned with the Y's values and mission. The Y was able to see it as a greater benefit because helping youth is part of their mandate and as well the donors were able to receive a tax receipt. So, there's many ways- they must be pre-approved, there must be policy around and some procedures around how charity will work with non-profit, and it's really important that all parties agree. Now, you'll see in the resources, I've put a link to a report that was done by the Community Foundations of Canada. And they are really clear about language that needs to be used when you're approaching these partnerships- that the language that needs to be used should be the language that's used in the CRA guidelines. And the reason for that is because so many people use charity, non-profit, grassroots interchangeably. So, they'll say I worked for a non-profit, but it's actually a charitable organization. So, it's really important to have that language upfront and the government guidelines are fantastic for outlining that.

Slide 13: So later on, we're going to look at a volunteer wheel and maybe look at why people volunteer. But as an organization, you're going to really be looking for two kinds of volunteers. So, targeted, which I would guess is the more formal setting. So usually, a targeted volunteer is a specific skillset you're looking for. And then we'll go into not, non-targeted, which is more a volume one-off that sort of thing. So, let's start with targeted. So, let's, all charitable organizations need to have a board of directors to which the organization is accountable for. So, when sitting on a board of direction, or sorry board of directors, comes a lot of responsibility. You're responsible fiscally for the organization. You're responsible for the reputation and the sustainability. So, you want a specific skillset on this board. You're not going to recruit all lawyers or all accountants or all people who have lived experience and really passionate about your organization. You need to look at a cross-section of the skills that you need and a cross section of the community so you're well-represented. So, this is where targeted recruitment comes in. So often when you're looking for board members, you'll do, you'll spread the net wide and say we're looking for dedicated individuals who have expertise in governance or experience and may bring some professional skills such as accountants, lawyers, business strategists. You need to be specific. You may also say in your, your posting we are looking for an individual with lived experience, who understands the systems, and, and how the government works within these agencies. So, you need to be very specific to what you're looking for. Another way you might look for targeted individuals is when you're running programs with the vulnerable. So, when you look at any kind of targeted recruitment, it's usually for a position that involves a longer commitment. So, you have the training, interviewing, references- sometimes the sector vulnerability check and we know you need that to even volunteer in any school board, it's important that people have that. But when you're working with vulnerable- youth, seniors, people at risk it's important that folks that come in are able to meet these standards. There's usually almost always a position description just as when you're looking for a job. It has the requirements, the expectations, skillsets, all of those, time commitments, all of that needs to be laid out. So, the same amount of work that goes into hiring a new staff member, is the same, it should be the same when you're doing that targeted recruitment for, for your organization.

Slide 14: Now I touched a little bit on board members, but governance is, covers everything from financial viability to the organization to ensuring that the mission is being carried out as it should be. It is a governance role, meaning that board members ideally would not be involved in the day-to-day operation. It's more strategic, visionary, and to analysis risk. So, your board of governors should always be asked to analyze risk. So, often the board sets the direction, makes policy and strategic decisions that will look at the longevity, sustainability, and meeting mission for the organization. And the staff would look after the day-to-day operations, how the organization runs, who they hire, and their different targets that they need to meet.

Governance is one of the most rewarding jobs. And one thing that you need to remember is board members are volunteers. So, board members in the charitable sector do not receive any financial gift or a salary to be on a board. So, the idea of being on a board is getting that perfect match of value and skillsets that individuals can commit. Board terms are never less than two years. Of course, if a board member would like to leave before then they're open to, but the idea is a board member has the time to learn about the organization. So, the organization-running their mission, finances, cashflow, and just how that works. The board members also oversee the most senior staff. So, the board would oversee the CEO or executive director of an organization and they're responsible for that as well. You could see where HR experience also plays a role. Boardable.com offers this, which I've shared on this slide, this definition. Capacity Canada, which is also in the notes, offers excellent top-drawer training for both board members and for staff. And they also have remote training for those of you who aren't in our community.

Slide 15: Look at a non-targeted, non-formal board. So, this might be, you know, we're having a barbecue, we need people to flip the burgers. We need people to work the parking lot and to ask people to park in their appropriate spot. We need someone to oversee beverages and we need gifts and prizes for the games that we're going to be offering. So, can we have a team put together who will go out and solicit those gifts and bring them in. There are many opportunities. And this is some of the most rewarding work as well. Who doesn't love to spend their Saturday morning helping out at a powwow or their children's church or whatever that looks like for you- to make sure that our community is running and it's a fulfilling experience as you can imagine. I said that the non-targeted is often event-based. It's a broader range to the community. I know myself- often when we volunteer at these non-targeted, you know, when there's an event, it's something that I can bring my family to. So, everything from ushering plays to being a greeter at the art gallery, we've done many things that we can do as a family. And ensure that, that my children also have that experience. So, I always, I can't see this without saying, you know, if you have the opportunity to volunteer and enrich your life to make that commitment and do so.

Slide 16: So, managing the overlap of volunteers. Volunteers are going to keep coming back when they feel that you're, you're utilizing their skills, their valued, and they're making a contribution. So, it's really important when you have this influx of volunteers, both targeted and non-targeted, that you keep your volunteers engaged in your organization. That can happen many ways. I know with leadership Waterloo Region, we offer a monthly newsletter, which keeps folks up to date, but it also offers resources so they can continue their leadership development. We also make sure that our volunteers are invited to all of our events. Some

events there's a ticket price, some events are free and they're for development so you can continue your leadership journey. The most important part is to manage that overlap by finding out why people volunteer for your organization. So, have them fill out a questionnaire, know why they're passionate about your organization. Why you, why did they come there? What are your strengths? If you don't have these conversations, you'll never know. And how would they like to get involved? And that's really important not to assume. I've been a professional fundraiser all my life and most of the time when I volunteer, that's not what I want to volunteer for. Right, so people might assume, cause that's what I do that's what I'd be good at. But you know, sometimes I like to do coat check and I like to sit on a board and look at risk and strategy as opposed to just being asked to do what is expected. Don't make promises you cannot keep. That's the biggest thing when managing volunteers, you can't promise folks that you'll be in touch and then never be in touch. It's important to find out why and set expectations. So, with COVID it is a great example. We're not utilizing as many volunteers as we used to because we had so many in-person events. And it's that communication with volunteers- we'll say this is how we can keep you involved in the meantime. And we will be re, recruiting for more targeted positions in the future. And how can we keep in touch with you? Because this is what I can offer. What are your expectations? Always set expectations, the duties, and time commitment when you're managing volunteers. So, if you've talked to somebody about being involved in an event and they think it's a 4-hour commitment, but actually there's about 30 hours of committee meetings before that day, it's really important that they know that they have a realization of that. So, it's important to just keep in touch with your volunteers. Gratitude, thank you- you can't say that enough. And also find out why they're there- we've touched on that before, that's the most important information for your organization. How did you hear about us? Did you have a life experience that has given you passion for our organization? And are we meeting your needs? Is this how you would like to be involved? And make notes, keep files on volunteers so that when you're speaking with them, you're just picking up on the relationship you're not starting a new relationship every time you see them- if you don't see them often.

Slide 17: Talk about motivating and engaging volunteers. There's so many obvious, like you're working with people, so to use your best personable skills, but some things that are obvious it's great to repeat because it's a reminder. So, check your assumptions about volunteers. Don't assume you know why they're there. And that goes back to the last slide when we talk about ask people why they, why you, why your organization, like, why did they choose to volunteer with your organization? Design a volunteer engagement program, it should not be done off the side of someone's desk. There are great examples. I'm all about R and D, you know, rip off and duplicate. So, there's other organizations out there that have volunteer engagement programs, ask them if they would share that with you. It's really important that all volunteers are treated the same from the time you meet them, or their application comes in, to how you recognize their service. So, it's really important to be equitable. Show your appreciation. Thank you goes along way- sincere appreciation. Getting to know people and having that relationship is the best way to show appreciation. You can do more formal things as well, volunteer newsletters. You can have a annual event where all your volunteers come together and you just have coffee and you say, thank you. But it's really important that you show that appreciation. Time is

money, your volunteers are there because they want to be there. So if you tell them it's a two hour commitment, value their time and make sure it's a two hour commitment. Don't have meetings because you usually have a meeting on that day. Only meet when there's information to share and there's a reason to have a meeting. Just really be, be cognizant and ask, check in- are we using your time wisely? Is this a good use of your time? What can I be doing differently? Is there a better way to communicate? Always value that time. Play to their strengths. And this is something we can't say enough. We say it all the time at Leadership Waterloo Region and any leader when you're working with a team- play to your strengths. When folks are volunteering, remember they're not being paid. This should be a fantastic experience for them. So, if you're going to have a volunteer in an ill-suited role, a role that they don't enjoy, they're not using their strengths, it is not going to be a good experience for them. So that's where we go to the questionnaire, the relationship, the conversation. What are you great at? Often people volunteer because they're not in a workplace that is allowing them to use a hundred percent of their strength. So, by volunteering, it gives them the opportunity to flex that muscle. And it's important that we, we listen and ask those questions, so we know where volunteers are best suited. Communicate and listen to feedback. The worst thing you can do is ask for someone's advice and ignore it. So, I like to have a feedback mechanism that's regular. So, you know, after we run events- after, it's a, it's a survey that people do it's sent out immediately. I offer prize draws for those who fill in their questionnaire. And it's just really important that we have that collective feedback and listen. So, if someone says, I felt rushed, don't assume they were just running at a slower pace than other people. They felt rushed. Why? So really listen, communicate, and act on that information that comes in. We all want to set people up for success. So, you have to give your volunteers the training and resources they need. Volunteers should never have to wing it. They shouldn't feel ill, ill prepared. They should never have to put their hand in their pocket to pay for something because you didn't give them money for the hot dog buns or whatever that looks like. They have to have the training and resources. Again, this goes back to making sure that all volunteers are treated the same, they're heard, and they all have the same training and access to resources. Now cultivating your volunteers for other, bigger roles. We look at pipeline development. You look at pipeline development in sales. You look at pipeline development for volunteers and for fundraising as well. So, you have a volunteer that is interested in your organization. They volunteer at the fun run. But they want to be more engaged. They want to be able to bring more of their strengths to the table. So, it's keeping that individual, apprised of what you're doing, keeping them in the loop, keeping them excited about your organization, and getting them ready for those bigger roles. Usually people the first- any kind of involvement they've had with your organization usually isn't on the board of directors. So, there's lots of committees. You have a structure so ensure that that's where volunteers can come in and that you're able to cultivate and help get them ready for more to come.

Slide 18: Volunteer Canada, volunteer.ca is listed on the resource page and everything volunteer you can find there. They are a fantastic resource, but I really wanted to include their, their volunteer wheel. So, it's important when we look at this is the value of volunteering. So, we talked about managing the overlap and targeting volunteers and making sure that we cultivate those relationships, but building that confidence, competence, connection, and

community is what it's all about. So, when we look at this wheel, it's amazing to see again, it's a wheel, how it all ties together. It keeps rolling, keeps rolling. We're all a part of something bigger where our organizations have partners, our organizations benefit from each other. So, it's wonderful to see how this works. So, I'm, I'm a big proponent of let's share some resources. Sometimes you can do some joint volunteer training. Some joint volunteer recognition. You know, if you're able to have a organization that you partner with and you combine your budgets, often you can have a little bit bigger of an event. So again, Volunteer Canada is a great resource.

Slide 19: Here's a list of some resources that I referenced in today's module. But please, I invite you, go onto the website and learn and read. Any questions, the Government of Canada's website is really great for referencing. So, if you have a question, the answer should be there. If not, you can always call and speak to a human and they will help you. But Volunteer Canada is my go-to. Community Foundations of Canada and Capacity Canada all have solid information that I've been able to reference, share, actually some of it, I actually keep on my desk. So, I just really encourage you to check them all out.