

## SENIOR EXECUTIVE FORUM

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### OBA Conference Centre, Toronto

Date: November 18, 2024 | Time: 8:30 am to 5:00 pm

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The Canadian National Fundraising Conference is a One-Day Strategic Executive Forum programmed exclusively for senior leadership and the fundraising teams at major charities, nonprofits, foundations and philanthropic organizations.

The Canadian National Fundraising Conference is a collaboration between **Foundation Magazine** and **The Hilborn Group**, including the **Civil Sector Press** and **Charity eNews**. Attend and you'll be part of a new annual fundraising forum that helps you expand your organization-wide funding and donations. Plus...if you attend the workshop you can also sit in on the keynotes and the networking session.

Plus each delegate will receive a **FREE printed copy** of the new edition of *The Canadian Donor's Guide* the annual reference book for donors and their advisors. A value of \$125.00. **PLUS...**

The Conference also offers a **One-Day, Hands-On Workshop** for the fundraising professional looking for new ideas, proven tactics, impactful strategy and a host of other tools and tips to increase response, increase average donation size, retain donors as supporters and more.

**VISIT THE CONFERENCE WEBSITE** [www.foundationmag.ca/cnfc2024](http://www.foundationmag.ca/cnfc2024)

### CONFERENCE TIMETABLE AND SPEAKERS

**7:45 am** | Registration Opens, Breakfast, Networking

**8:20 am** | Welcoming Remarks | **Jim Hilborn, Conference Co-Chair**

**8:30 am** | Morning Keynote with **Lara O'Donnell, Executive Director, The Weston Family Foundation**

**9:35 am to 10:25 pm** | Super Sessions (2) | **Plus Fundraising Workshop Starts w/ Billy Sharma**

#### **1. Sheldon Pollett, Executive Director, Raising the Roof**

How to Raise the Roof on Fundraising Challenges. The challenge and opportunity of evidenced based investment for evidenced based outcomes. This session will look at comprehensive solutions to complex problems. Ideas we need to think about and respond to effectively: If system change was simple, we would have done it a long time ago; Taking a coalition-based approach to funding and impact; Investment in mission driven organizations and the challenges of partnership and collaboration with diverse stakeholders; Towards a growing movement of impact measurement and outcomes; Hear how Raising the Roof addresses fundraising opportunities and deals with the challenges of finding the right solutions.

#### **2. Mikhael Bornstein, Continuing Education, Professional Fundraiser, George Brown College**

Effective Nonprofit Leadership: What is it and How to Develop it? What makes an effective nonprofit leader? What leadership skills are required? What leadership style is most effective? What should a fundraising leader never do? Participants in this session will learn the answers to all these questions, and more. Based on Canadian research, participants will learn what leadership skills and leadership styles produce the best results. They will learn how to develop these skill and styles to become more effective nonprofit leaders. They will learn how to avoid the common mistakes that sabotage leaders. Finally, participants will receive a list of resources so they can continue their leadership development after the summit. If you want to improve your leadership skills, this session is for you. Participants will leave this session knowing: • what are the most effective leadership styles for nonprofit leaders; • how to incorporate the most effective leadership styles into their own leadership practice; • how to avoid the most common leadership mistakes that sabotage success; • where to find more resources to continue their leadership journey. This session is aimed at new and experienced non-profit leaders.

**10:30 am to 11:25 am | Super Sessions (2)**

**3. Scott Townsend, Vice President, Brand Strategy, Marketing and Communications, Parkinson's Canada & Jon Affleck, Special Advisor, Parkinson's Canada**

Find Your Swagger: Our mission is unwavering: to reclaim the narrative of living with Parkinson's. To inject vibrance where others see only stillness. Step inside the creation and execution of the powerful new fundraising campaign, with insights from the minds behind the strategy and implementation. Get an insight into the reasoning, the process, the research that goes into successful multimedia fundraising where each sway and stutter-step transform Parkinson's into a unique swagger.

**4. Bruce MacDonald, CEO, Imagine Canada**

Riding the Waves: Insights and Trends Affecting Social Good. Charities and nonprofits operate in an ever changing environment. Understanding the shifts and trends is critical for leaders as they look ahead to the future for their organizations. This session will examine recent, new and some yet-to-be published data relating to the operating environment that will inform the strategies and tactics used by fund development teams.

**11:35 am to 12:30 pm | Super Sessions (2)**

**5. Kay Marks, Director of Fundraising, Veterinarians Without Borders**

Ditch the Old Fundraising Funnel: It's Time for an Audience-First Revolution. In today's rapidly evolving philanthropic landscape, successful fundraising requires a shift from organization-centric strategies to donor-centric relationships. Join us for an insightful session that explores the Audience First Approach and the Bowtie Funnel—a model that goes beyond acquisition to focus on long-term donor engagement, retention, and advocacy. Learn how to build personalized donor journeys, create lasting connections, and transform one-time supporters into lifelong champions for your cause. This session is essential for fundraising leaders looking to innovate and maximize impact.

**6. Christian Bolduc, President, LL.B, CFRE, BNP Philanthropic Performance**

Inside the 2024 Succession Planning Survey. This survey has provided valuable information on current strategies and future succession needs for key positions within not-for-profit organizations across the country. It helps to understand effective practices and the challenges faced by different sectors and company sizes. The survey is structured into several sections, each targeting a specific aspect of succession planning: Executive Director (ED) succession planning: This section assesses the methods and procedures in place to ensure a smooth and effective transition of ED responsibilities. We explore competency development plans, identification of potential candidates and handover strategies. Succession planning for the Chair of the Board: Here, we focus on processes dedicated to succession planning for the chair of the Board. It is crucial to understand how

organizations prepare future chair to take over, thereby ensuring continuity of governance and organizational stability.

**12:30 pm to 1:30 pm** | Luncheon, Networking | Afternoon Keynote

**Luncheon Keynote: Steve Burrows**, Author, Birder Murder Mysteries, Environmental Supporter/Speaker

**1:35 pm to 2:30 pm** Super Sessions (2)

**7. Paul Nazareth, Principal, Paul Nazareth Consulting**

A Question of Generosity (with the Generosity Guy...). Fine. Maybe I was wrong? After 25 years of working in the charitable sector, and a lifetime of volunteering on the edge of burnout on top of full-time work; professional development, community board support, sector speaking, intellectual contributions – to what end IS fundraising as a profession? There IS a dissonance between fundraising, philanthropy and generosity. Just like there's a difference between transactional golf tournaments and transitional wealth planning both are integral to modern philanthropy--are either generous? Why were donor-advised funds automatically assumed to be bad and how is the sector's fear costing us more than we might understand? As a sector can we overcome our collective egos and brand-centeredness to ask honest questions in service of plural and civic society, in a spirit of actual truth as much as reconciliation? What we can prove with the data, is no amount of fundraising is going to get out of the crisis of housing, healthcare, homelessness and hunger so let's connect the dots between #GivingTuesday, #NationalPhilanthropyDay and the dreaded December 31 – all fast approaching. I'm going to ask and answer these questions for myself and hope they will prompt some from you too.

**8. George Irish, Fundraising AI**

Hesitating on AI? When to wait and when to start with smart AI fundraising. Unsure if you should start with using ChatGPT and AI for fundraising, but also worried about missing the 'next big thing'? In this interactive session we'll explore the concerns, risks and 'hesitations' that may be holding back fundraisers at this early stage of the AI revolution, and opportunities to get started with safe, ethical, and results-driven AI fundraising.

**2:35 pm to 3:30 pm**

**9. Julie Fiorini, General Manager, Donor Services & Brand Marketing, CanadaHelps**

State of the Sector 2024: From Disconnection to Collective Action. It is a challenging environment to spark change right now. Canadians are increasingly polarized, isolated, and disconnected, many Canadian charities are struggling to raise funds for their charity in part due to the challenging economic conditions facing many Canadians, and even four years later, the lingering effects of the global pandemic have had a lasting impact on some organizations and have contributed to total burnout among some charity professionals. All hope, however, is not lost. In this 60-minute session, Julie Fiorini, General Manager, Donor Services and Brand at CanadaHelps, Canada's largest online donation and fundraising platform, will share ways that Canadian charities can push forward to adapt to challenges and focus on their mission. Session participants will learn: Insights from trends highlighted in CanadaHelps' 2024 Giving Report; Tactics that your charities can leverage to reach and build a community among your supporters to raise more funds; Insights about the way forward for Canadian charities to overcome these challenges.

**10. Cynthia Armour, Principal Consultant, Elderstone.**

Leadership Succession Planning and Its Impact on Fundraising Success. Where do succession planning and fundraising success intersect? Would your organization be able to sustain a decline in

income or fundraising activities if there's a change in leadership? Do investors trust the organization can succeed without the current executive? Who is responsible for donor relations? These are a few questions we'll explore in this fast-paced session with board governance and fundraising pioneer Cynthia Armour, (CFRE since 1995). She will also lead a facilitated discussion identifying roadblocks while inspiring leaders to take practical steps that prepare your organization for leadership transitions at the staff and board levels.

**3:35 pm to 4:30 pm**

**11. Sara Krynitzki, Director of Public Affairs and Research, Philanthropic Foundations Canada.**

How Philanthropic Foundations in Canada are Approaching Their Work in 2024 and Beyond. In Canada, 1 in 8 charities is a foundation, yet foundations in Canada are an enigma to most, even to seasoned leaders in the charitable sector. At this session, hear from Philanthropic Foundations Canada – Canada's national network for philanthropic foundations – to learn more about who foundations are today, what they're up to, and how they are collaborating, learning and advancing change on the issues we all care about. Gain new insights and awareness directly relevant to your own work and strategies involving philanthropic foundations.

**12. Kimberley Mackenzie, Charity Executive and Leadership Coach**

The 4C Framework for High-Performing Teams: Driving Results through Organizational Wellness, Confidence Building, and Coaching Mindsets. In today's competitive environment, high-performing teams are more critical than ever. This session introduces the 4C Framework—Coaching, Collaboration, Confidence, and Clarity—designed to help leaders foster a culture of wellness, resilience, and high performance within their organizations. By focusing on the well-being of the team, participants will learn how to create an environment that boosts morale, fosters deeper collaboration, and ultimately drives more impactful results. The session will blend data-backed insights on wellness, practical coaching strategies, and actionable techniques to build confident, cohesive, and highly motivated teams. Learning Objectives: Understand the data behind team well-being and its impact on performance; Learn and apply concrete practices that enhance the overall wellness and productivity of your team; Foster collaboration and build confidence using a coaching mindset to achieve outstanding results.

**4:30 pm | Closing Presentation**

**Closing Keynote: Suzanne Duncan, VP Philanthropy, Canadian Women's Foundation**

Transforming Charity: Gender Equality, Wealth Transfer, and the Future of Fundraising. The gendered transfer of wealth now under way has the potential to supercharge feminist philanthropy. Suzanne Duncan will discuss how we all have a stake in supporting more intersectional gender-based approaches to Canada's most pressing social problems.

To learn more or become a speaker or sponsor, please email Steve Lloyd, Publisher & Editor in Chief, Foundation Magazine [www.foundationmag.ca](http://www.foundationmag.ca) at [steve.lloyd@lloydmedia.ca](mailto:steve.lloyd@lloydmedia.ca) or call 905-201-6600 or contact Jim Hilborn, Hilborn Charity eNEWS, at <https://hilborn-charityenews.ca> at [james@hilborn.com](mailto:james@hilborn.com) or call 416-554-9403. [www.foundationmag.ca](http://www.foundationmag.ca)