NATIONAL SUMMIT REPORT

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THIS ARTICLE PROVIDES A SUMMARY OF THE REPORT (Gauthier, Hamilton, Mackenzie, & Faul, 2012) of the National Summit for the Charitable and Nonprofit Sector held in Ottawa November 28-30, 2011. The product of multiple authors and contributors, the report discusses five key Summit outcomes and identifies the path forward for each of the four Priorities for Action that were considered and advanced by more than 500 leaders through in-person and online engagement during the Summit. The Summit was held as part of the ongoing National Engagement Strategy (NES) that, at its core, is about enabling charities and nonprofits to have positive and lasting impact in communities across Canada and around the world.

KEY OUTCOMES OF THE NATIONAL SUMMIT

RECOGNIZING CHARITIES AND NONPROFITS AS A SECTOR: "WE ARE A SECTOR AND NEED TO WORK AS ONE!"

The 2009 community conversations, the 2010 provincial and territorial events, and the 2011 Summit enabled more than 1,100 charities and nonprofits to come together and confirm that they have much in common and that they are part of a vibrant and contributing sector. The first key outcome of the Summit, then, was confirmation that we belong to something bigger than the individual organizations or movements for which we work or volunteer. This realization had been building as we crisscrossed the country to pursue community conversations about the decade ahead and as we discussed and validated the drivers of change through provincial and territorial conversations. It crystallized at the Summit, where more than 500 leaders were able to affirm the value of our collective efforts and assets. This widespread recognition is critical to our future efforts to speak with strong, united voices and work collaboratively in the years ahead.

LEADING COLLABORATIVELY AT THE NATIONAL AND LOCAL LEVELS: "WE CAN AND MUST WORK TOGETHER FOR GREATER IMPACT!"

Seeing ourselves as a sector, while a significant outcome, is insufficient to bring about the change in mindset needed for us to fully leverage our collective assets for the benefit of communities. We also need to act like a sector and model the collaborative leadership that is critical to our collective success. Another key outcome, then, was the modelling of collaborative leadership in the planning, financing, and execution of the Summit.

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The community conversations and the provincial and territorial events required us to develop strong relationships of trust with organizations across the country. In building the strategy from the ground up, we relied on the networks, knowledge, and resources at the local and provincial levels, which in turn laid the groundwork for the display of collaborative leadership at the Summit. The successes of the 2009 and 2010 events are largely attributed to the efforts and engagement of organizations on the ground. They used their power of convening and their in-depth understanding of local and provincial actors to bring the sector together one community and one province after the other.

When it came time for the Summit, Imagine Canada welcomed Community Foundations of Canada, Philanthropic Foundations Canada, and United Way Centraide Canada as co-hosts. All four co-hosts leveraged their networks, expertise, and resources to ensure the success of the event. Staff and volunteers from these organizations worked seamlessly to deliver on all aspects of the Summit. The end result was much more successful than any of us could have achieved independently.

Similarly, twelve co-leads, from across the country and across the generational divide, worked together to plan and design the working sessions for the four priority areas. Lessons were learned by all regarding how to do it better or differently in the future. However, there is little doubt that the working group sessions were enriched by the significant time and energy that the co-leads committed to the process of providing pre-Summit engagement opportunities and using technology to heighten the exchange.

The modelling of collaborative leadership also extended to the ways in which funders engaged in the Summit. The primary funders of the Summit, the Agora Foundation, the J.W. McConnell Family Foundation, and the Ontario Trillium Foundation, engaged informally with the co-hosts throughout the planning process in ways that strengthened the end result. The Ontario Trillium Foundation was also instrumental in catalyzing the partnership among the co-host organizations. Foundations and organizations further modelled collaborative leadership through their overwhelming financial support for the presence of young leaders at the event. The entire Summit was put on by the sector for the sector, with no substantial government funding and welcome but limited dollars from corporate partners.

The collaborative leadership that marked the Summit had a cascading effect in that local leaders emerged during and after the event to bring together colleagues who lived in the same city or province or who shared similar interests. Colleagues from Saskatchewan and London met at the Summit to consider how they might work locally and provincially to advance one or more of the four priorities for action. Other colleagues in Vancouver, Prince Edward Island, and Edmonton are meeting to move the yardsticks in their communities and are pursuing local solutions to local priorities that are aligned with and support the sector's agenda.

ENGAGING FULLY THE NEXT GENERATION OF LEADERS: "WE NEED INTERGENERATIONAL LEADERSHIP TO SUCCEED!"

When the National Engagement Strategy was first conceived, no particular thought was given to the role of young and emerging leaders in defining the future we want and in

mobilizing for change. While young leaders were present at some of the events, they were in the minority, relegated to supporting roles or forced as individuals to speak on behalf of an entire generation. In many instances, those who had worked in the sector for one or more decades would ascribe freely values, expectations, motivations, or behaviour to the next generation of leaders, without these leaders being present in meaningful numbers to speak for themselves.

Having recognized this shortcoming, the Advisory Committee identified the recruitment of young leaders to the Summit as a priority. The committee challenged us to boost the initially proposed target for the participation of young leaders from 40 to 80 participants. In the end, more than 100 young leaders participated either in person or online in the Summit.

Consequently, another key Summit outcome was the successful recruitment and engagement of young leaders in a way that integrated them into an intergenerational conversation about the future of the sector. Via the Summit website, a pre-Summit webinar hosted by the four young co-leads, and opening receptions sponsored by Mackenzie Investments and PricewaterhouseCoopers, young leaders were able to introduce themselves to one another, to local members of MESH, a network for young nonprofit professionals in Ottawa, and to other Summit participants.

The young leaders' views and opinions were also central to the pre-engagement and on-site work on the four Priorities for Action. For each Priority for Action, a young co-lead was identified and contributed to the scope and content of the working group sessions. These same young co-leads were also invited to publish their thoughts about the priority they were working on in the special edition of the Philanthropist shared with participants.

Many long-standing leaders of charities and nonprofits as well as recent arrivals remarked that the mix of young and more established leaders gave the Summit reception, plenaries, and working sessions a very different feel and tone. The presence of the next generation of leaders also enhanced the ethnic diversity of participants. The need for the sector to consciously engage an even greater diversity of Canadians, both as staff and as volunteers, was recognized nonetheless as an important challenge by Summit participants.

Some young leaders noted that the designation of young and emerging leaders did not sit well with them. In some instances, this was because although they were young, they already saw themselves as leaders, not emerging ones. In other instances, being called a young leader when one is nearing 35 seemed to negate the significant experience and knowledge already acquired to date. In the next phase of the National Engagement Strategy, we will heed this feedback to define young leaders' engagement in ways which empower – not diminish or ghettoize – their contributions.

Leveraging the diversity and ubiquity of the sector: "Everyone has a contribution to make!"

From our review of the evaluations and the testimonials, another key outcome of the Summit was the extent to which it represented the dazzling plurality of mission, size, geography, and cultures embodied by the sector. The Summit sought to be authentically inclusive on several fronts. Given the national scope and location of the gathering, we were committed to giving more than lip service to official bilingualism. From the opening slam poetry performed by our emcee, Nathanaël Larochette, through to our closing keynote speaker Julie Payette, we sought to ensure that all aspects of the Summit were inclusive of both of Canada's official languages.

As well, from the very start of the National Engagement Strategy, the late John Hodgson, former Chair of the Agora Foundation whose vision kick started the NES, had challenged Imagine Canada to ensure that small organizations would be engaged and benefit from efforts to strengthen the sector's collective voice. Through dedicated outreach via a wide array of networks, more than 20 percent of Summit participants were attracted from small organizations from across the country. The online component of the Summit and the website posting of video of the plenary sessions extended the reach of the Summit to a greater number of smaller organizations in particular that need flexible access to the content.

The organizing team also reached out to traditionally underrepresented groups such as arts and environmental organizations. As Alain Pineau of the Canadian Conference for the Arts acknowledged in his remarks at the Summit, this was a rare sector event that fully embraced the presence and the vibrancy of the arts community. Similarly, our Summit interaction with colleagues from environmental organizations has laid the foundation for enhanced communication and ongoing joint engagement on key issues like foreign funding of charities and the role of charities in the public policy process. These and other Summit interactions allowed us all to see the great diversity of causes that we represent and perspectives that we bring as an asset rather than a liability. There was strong recognition that everyone who participated can make a significant contribution to strengthening the sector simply by starting in his or her own organization or community.

TAKING RISKS WITH TECHNOLOGY TO HEIGHTEN INTERACTION: "WE CAN AND WILL LEVERAGE TECHNOLOGY EFFECTIVELY!"

During the 2009 and 2010 events, many colleagues noted that the sector was widely recognized for its ability to leverage its vast networks to engage people across sectors and geography. However, many suggested that new technologies were challenging our traditional strength in networking and that they did not feel well-equipped to leverage new technologies and social media strategically. Organizations also said that while everyone was urging them to innovate through technology, few could afford the reputational risk if the technology should fail at an inopportune moment or if their attempts to engage stakeholders online proved unsuccessful.

To model the behaviour that the sector needs to adopt in order to thrive over the next decade, the Summit co-hosts decided to use technology extensively throughout the event, despite the inherent risks of the attempt failing or the technology not being deployed

optimally. The success of the technology portion of the event also required a leap of faith from the Agora Foundation. It provided additional financial support to properly fund the technical requirements and support the planning and deployment of the technology.

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Another key Summit outcome is thus the integration of technology to both heighten the interactivity for face-to-face participants and extend the reach of the Summit to participants and speakers who would have been unable to join us. The use of technology in the plenary sessions enabled both in-room and online participants to pose a wider array of questions to keynote speakers in a more efficient way. It also allowed the organizing team to capture participants' real-time questions and comments and to later redistribute them to all to inform our ongoing thinking and actions on these issues. Overall, the use of technology in the plenary was very well received.

The response to the use made of technology during the working group sessions on the four Priorities for Action was split. Many noted that it allowed participants in the room to quickly gain a more comprehensive sense of the discussion at other tables. It also enabled us to capture all of the raw data from hundreds of table conversations for subsequent review and analysis by all of the 500 participants. The efforts of the theme teams, however, met with mixed reviews. This was due not to the analytical prowess of the "themers," but to concerns that emphasis on common denominators would leave some of the gems or dissenting opinions on the cutting room floor.

Most online participants were very appreciative of the opportunity to engage from afar. In-room participants also indicated strong support for the online offering. Many noted that the sector should do this more often. In future, we will consider marketing the online Summit in parallel with the face-to-face Summit and ensure that each aspect of the offering maximizes online participants' interaction not just with each other but also with in-room participants. We will also consider combining online participation in a national event with local face-to-face gatherings to increase colleagues' sense of engagement in the process.

NEXT STEPS

Priority one: Attraction and retention of paid staff

The HR Council for the Nonprofit Sector has been a partner in the National Engagement Strategy since its inception and expects to assume responsibility for facilitating follow-up on Priority 1. Given its substantial contributions to the sector's understanding of HR issues, the HR Council is well positioned to lead this work. However, the HR Council is entering a time of transition and transformation given recent federal government funding decisions.

A THRIVING HR COUNCIL

During the working group sessions on Priority 1, there was widespread recognition of the importance of supporting the HR Council through its transition so as to preserve its strategic assets. The HR Council is planning for a sustainable future and has begun to meet with partners throughout the sector to identify elements of support that can help

the organization make a significant shift in its operations. When the Summit co-hosts met post-Summit, there was strong support for making the re-incubation of the HR Council – through the engagement of key players from across the sector – a key goal for 2012 in advancing Priority 1.

NEW HR MANAGEMENT RESOURCES FOR THE SECTOR

Even as the focus in the immediate term is on the re-incubation of the HR Council for the sector by the sector, the HR Council is pursuing in 2012 a number of initiatives that align well with Summit participants' wish list. Summit participants in the HR sessions identified the need for quality HR information and support for the implementation of effective HR management policies and practices as one of the key outcomes sought. In addition, Summit participants acknowledged the need for an education campaign about the sector, HR, and pay that is aimed at the sector itself, funders, donors, partners, and the public. The HR Council will engage the co-leads for this priority area, Marlene Deboisbriand, Bob Wyatt, and Miia Suokonautio, in thinking about how best to align the next phase of the HR Council's efforts with the most highly-sought outcomes.

The HR Council continues to work with sector partners who are leading labour force initiatives at the provincial level. This year will also see the completion of a number of projects that line up well with Summit participants' aspirations for quality HR information and support:

- An ongoing forum for convening partners from across the country to discuss labour force initiatives has been undertaken through the Building Cohesion in Labour Force Strategies Project.
- The Skills and Leadership Development in Canada's Nonprofit Sector Project seeks to understand the state of skills development. It also delves into questions about a leadership deficit and develops an occupational standard for administrators of volunteers.
- The Increasing Diversity in Canadian Nonprofits Project is identifying key issues that are preventing nonprofits from accessing the talents of new immigrants and Canadians from diverse cultural backgrounds.
- Finally, the HR Council has just embarked on the second phase of its work aimed at improving access to good labour market information for the sector. This project will likely add eight to ten new information pieces to the website over the next year.

Priority two: Sustainable and diversified financing of the sector

PHILANTHROPY

On the philanthropy front, participants identified advocacy to promote the inclusion of the Stretch Tax Credit for Charitable Giving and the capital gains exemption for gifts of real estate in Budget 2012 as a top outcome sought. There has been significant move-

ment on this front as organizations across the sector, in partnership with Imagine Canada, have worked to raise awareness of, and support for, the Stretch Tax Credit proposal with federal officials and politicians. On December 1st, Imagine Canada's Day on the Hill, a number of sector leaders met in small groups with senior officials and politicians from both the government benches and the opposition to discuss the priorities that had emerged from the National Summit and to promote the inclusion of the Stretch Tax Credit in the next budget.

In mid-December, Michelle Gauthier and Susan Manwaring convened colleagues from across the sector who planned to engage in House of Commons Finance Committee's hearings on charitable giving. More than 80 leaders from across a broad array of subsectors have participated in the working group established to ensure strong consistent messaging in both the written briefs and the presentations to the Committee. Thanks in part to this collaborative effort, the tone and content of the hearings to date have been remarkably positive and rich. The members who sit on the Finance Committee have displayed genuine interest in understanding more fully the current system for incentivizing charitable giving and discussing the merits of a number of proposals. Many sector leaders who participated in the Summit, including the four co-hosts, have or are scheduled to appear at the hearings which began in early February.

GRANTS AND CONTRIBUTIONS

Efforts have also been made to take Summit participants' messages on grants and contributions directly to those who are charged with the implementation of the next phase of the federal government's Action Plan on grants and contributions. Imagine Canada staff members have met with officials at Treasury Board (the federal department with overarching responsibility for grants and contributions) to pursue the conversation about the government's efforts to improve the administration of these programs. Officials expressed strong interest in receiving a copy of the National Summit report as well as the detailed data from the working group sessions of Priority 2, which will help them identify some key client-facing outcomes for the next phase of the reform effort. We relayed in particular the concerns expressed about the need for multi-year funding, full cost-recovery, and standardized applications and reporting forms and shared Imagine Canada's statement on federal funding trends. We also emphasized that one critical area in which the government could improve its track record in the immediate term is to ensure that when charities or nonprofits are successful in attracting grants and contributions, the money be delivered when promised, and not many weeks or months later.

EARNED INCOME AND FINANCIAL LITERACY

Longer term work is required on the third and fourth streams of the Financing Priority, those of earned income and financial literacy. Imagine Canada sees its role as helping to bring into the mainstream the key concepts and activities associated with earned income, social enterprise, and social finance. The goal is to ensure that this form of financing becomes increasingly feasible for a wide range of charities and nonprofits to embrace and implement either for the first time or more extensively. A wide range of players from across all sectors needs to come together to create an enabling environment (be it through more clarity of CRA regulations or legislative changes, business advisory and

support services, better access to capital, and/or the attraction and retention of appropriately skilled HR) to significantly advance the ability of a wide array of charities and nonprofits to enhance their earned income abilities. Over the coming months, Derek Gent, Hilary Pearson, and Adam Spence, the three co-leads of the Financing Priority, will work with Imagine Canada to identify and mobilize those best equipped to contribute to next steps on these third and fourth streams.

Priority three: Better understanding of the sector and its impact

As discussed during the working group sessions at the Summit, the follow-up to this priority is being undertaken in two simultaneous streams. The first stream is a tactical series of Qs and As that address the most common questions to which the sector must respond publicly and routinely. The second stream is a more complex strategic narrative that will lead to the creation and dissemination of key messages on behalf of the sector. It is about shifting the frame from "How do we hold the charitable and nonprofit sector accountable for the resources entrusted to it?" to "What is the sector's impact and how can I/we contribute?"

FOUNDATIONAL QS AND AS

The development of sector-wide Qs and As is already underway, thanks in part to the efforts of the working group that has been meeting since early December in anticipation of the Standing Committee on Finance hearings regarding incentives for charitable giving. To date, Qs and As have been drafted on such topics as charities' engagement in public policy, advocacy, and political activity; foreign funding of charities and nonprofits; the costs of fundraising; administrative costs; and the sector's commitment to transparency and accountability. Qs and As have also been prepared to clarify some of the sector's key federal public policy proposals (see Financing Priority), including the Stretch Tax Credit for Charitable Giving (and its implementation) and the transfer of the appeals process for charities to Tax Court.

These Qs and As are offered as foundational ones for the entire charitable and nonprofit sector. Individual organizations and groups of charities or nonprofits can build upon what we trust are consistent and clear cross-cutting responses to tailor additional or more specific answers for their individual organizational or sub-sector needs. These foundational Qs and As are living documents that will be reviewed at least twice a year and will be easily accessible on the Imagine Canada website and those of partner organizations. This work is ongoing under the direction of the Summit co-leads for this priority area.

A NEW FOUNDATIONAL NARRATIVE

This stream is premised on a sector-wide recognition that surfaced in the first two years of the National Engagement Strategy and that was crystallized at the Summit. The recognition is that as a sector, we have not adequately developed our own narrative, but rather have allowed others to define it for us. This has led to a framing of participation in and with the charitable and nonprofit sector that does not reflect the lived experience of volunteers, staff, donors, and those we serve and engage. The creation of a new foundational narrative – a broader understanding of the sector and its impact – is the

cornerstone of everything we need to do and will directly inform and influence our success on the other Priorities for Action.

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Awareness of the sector is not the ultimate goal. As per the wise counsel provided by Allan Gregg at the Summit, we need to anchor our efforts in behavioural change, not awareness. We need a re-framing of the sector's narrative to fundamentally shift conversations until our message – and the behaviour it seeks to encourage – is the new normal. This is a significant task that requires creating and promoting a new way of viewing the sector, focusing not on ourselves, but on the impact of our work, on the communities we serve and engage, and, ultimately, on what kind of Canada we want to create together.

Stephen Faul, Marcel Lauzière, Caroline Riseboro, and Lee Rose, the lead facilitators, are convening a small working group from across sub-sectors and will seek to secure branding and marketing support to assist with this effort. A number of participants have indicated their interest in working with us. The group will use the raw data from Priority 3 at the Summit as a starting point to create message(s) that will be tested and validated by December 2012. While the Summit co-leads for this priority area can be effective facilitators and conveners to get the work done, they will not succeed without many more at the table, including the voices of the next generation.

Priority four: Enhanced support for organizations to engage volunteers/external talent

Volunteer Canada has agreed to play a lead facilitation role in convening colleagues and following up on Priority 4. In reviewing the raw data for the working group sessions for this priority, three streams emerged. These three streams align well with current strategic directions and a variety of initiatives at Volunteer Canada and partner organizations across the country.

CULTURAL SHIFT AND CHANGING UNDERSTANDING OF VOLUNTEERING

The first stream of work requires sector leaders and enablers of volunteer talent to adopt more inclusive language that recognizes volunteering as citizen engagement and civic participation. It also leads us to reframe volunteering to move beyond a narrow concept of service delivery to a spectrum of engagement that spans individual engagement with a cause to leadership roles in organizations. Volunteering must be recognized as a vehicle for building social capital and social cohesion, and must move from a transactional framework to one that is transformational.

A number of activities are planned for the coming months that will help the sector to further refine the concept of volunteering. Volunteer Canada is currently facilitating dialogue on the changing role of volunteer centres given this emerging context and will reach out to Summit participants on how we can best enable and strengthen volunteerism in communities across the country. As well, in April, a roundtable discussion with national organizations will consider the revised Canadian Code for Volunteer Involvement as a standard of practice aligned with a culture shift in volunteer engagement.

ORGANIZATIONAL CAPACITY TO ENGAGE VOLUNTEERS EFFECTIVELY

As discussed during the working group sessions, building organizational capacity to engage volunteers with changing and growing expectations more effectively may require customized strategies for different groups, types of organizations, and communities. Despite this customization, all strategies necessitate an integrated approach to human resources so that volunteers are involved as a critical component of an organization's full talent pool and not marginalized to "helping out" or passive engagement. Technology will be an essential tool to reach out to volunteers more effectively and engage them more actively.

Volunteer Canada continues to roll out its Building the Bridge campaign to provide usable, web-based tools to support effective engagement based on the paradigm of today's volunteers and with a variety of cohorts such as youth, seniors, new Canadians, family volunteers, and employer-supported volunteers. The research that led to this campaign was developed through broad engagement with volunteers and charitable and nonprofit organizations across the country. A two-year pilot project on skills-based volunteering will result in a variety of tools being made available to sector organizations this spring.

Screening continues to be a huge issue and often a significant challenge for charities and nonprofits who engage volunteers. A National Dialogue on Screening in November has led to the development of an updated screening handbook, revised in partnership with the Department of Public Safety. Once the handbook is released, likely in April, it will be made widely available.

DIVERSITY

Cultural diversity is, of course, a critical lens, but our concept of diversity must also be broader (age, socio-economic, people with disabilities, Aboriginals) to ensure the sector reflects the communities they serve. This applies equally to paid employees and to volunteer engagement. We need to move beyond a perception of volunteering as "charity" for those who can "afford" the time to a frame where everyone can see themselves as a volunteer. A new digital resource centre, which connects new citizens to their communities through volunteering, was recently launched by the Institute for Canadian Citizenship and Volunteer Canada.

Achieving diversity will require joint efforts between those facilitating the follow-up on Priority 2 (the attraction and retention of paid staff) and Priority 4 (volunteerism). The HR Council and Volunteer Canada will consider in the months ahead how best this might be pursued. Ruth MacKenzie, Ilona Dougherty, and Wayne Helgason, the co-leads on Priority 4, will continue to play a role in facilitating the next steps of our collective efforts in collaboration with colleagues from across the sector.

AN INVITATION TO GET INVOLVED

One of the principles that guide our work is shared ownership of, and responsibility for, the process and the results. We therefore welcome ongoing and new contributions to the next phase of the NES. Together, we can lay the groundwork to ensure that the condi-

tions are ripe for all organizations, be they large or small, domestically or internationally focused, operating anywhere in Canada and across a wide array of missions, to have even greater and more sustainable impact.

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Progress on the NES, will be reported at http://nationalsummit.ca . To be added to the NES database for updates, co-ordinates should be sent to Ann Gratton at agratton@imaginecanada.ca .

WEBSITES

National Summit for the Charitable and Nonprofit Sector. http://nationalsummit.ca

National Summit for the Charitable and Nonprofit Sector. Priorities for Action. http://nationalsummit.ca/program/priorities-for-action/

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Canadian Conference for the Arts. Alain Pineau. http://ccarts.ca/about-the-cca/at-the-helm-of-the-cca/the-cca-team/

Canadian Conference for the Arts. http://ccarts.ca/

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National Summit for the Charitable and Nonprofit Sector. Keynote speaker Allan Gregg. http://nationalsummit.ca/speakers/#gregg

National Summit for the Charitable and Nonprofit Sector. Priority 3. http://nationalsummit.ca/program/priorities-for-action/#priority3

Volunteer Canada. http://volunteer.ca/home

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Volunteer Canada. Canadian Code for Volunteer Involvement. http://volunteer.ca/about-volunteerism/canadian-code-volunteer-involvement

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