CHARITY STARTS AT HOME

A look at Millennials and the shifting landscape of Charity across Canada

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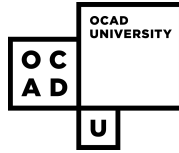
A look at Millennials and the shifting landscape of Charity across Canada

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for the degree of Master of Design in

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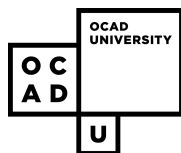Toronto, Ontario, Canada

December, 2015

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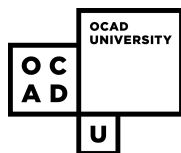
research.

Abstract

The focus of this research is centred on Millennials, who as citizens gaining more importance and authority in their communities, have a shared responsibility to shift perceptions of what being charitable encompasses. This paper begins by exploring the challenges that charities, foundations, nonprofits, and millennials face in terms of their impact through public perception. By conducting interviews to clarify scope of the research study, Millennial workshops, and circulating surveys to experts in the charitable and nonprofit sectors - this paper delves into the donor fabric in Canada, the importance of community empowerment, and how charitable operations have shifted as a result of Millennials' influence. The core contributions of this paper are a set of strategies that any organization from the charitable and nonprofit sectors can bring forward to establish cohesive relationships with Millennials whereby continuous feedback mechanisms serve to enhance engagement.

Keywords: Millennials, Charity, Nonprofits, Foundations, Canada, Civic, Engagement, Community, Empowerment, Strategies

Dedication

I wholeheartedly dedicate this project to my loving parents, Mohamed El-Fayomi and Nadia

Eleish, and my always encouraging sister Lyla El-Fayomi.

My family instilled in me the core values of Charity Starts at Home from a very young age, and

their continued support and constant inspiration has had a profound impact in shaping the

free-thinking individual I am today.

This entire body of work has been absolutely inspired by them.

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CHAPTER 01 - INTRODUCTION

Foreword

Millennials, also known as Generation Y, are the demographic cohort following generation X, and preceding Generation Z. The Millennial generation includes anyone born from the early 1980's to early 2000. Alternative names for this group proposed in the past include: Generation We, Global Generation, Generation Next and the Net Generation. Millennials are sometimes called Echo Boomers, referring to the generation's size relative to the Baby Boomer generation and due to significant increases in birth rates during the 1980s into the 1990s. (PBS, 2010) In Canada, the official body of Statistics Canada has declared 1992 as the last year of birth for Generation Y. (The Globe and Mail, 2013)

We've all heard them. Assumptions, impositions, and generalizations made about Millennials and their collective nature. Experts have deemed Millennials the 'Me Me Me' generation, asserting they're entitled, lazy, and even narcissistic. (Stein, 2013) Simultaneously, there is a vast amount of information out there swirling around in the form of articles, papers, and other research offering insights that Canada is at an all time low with respect to civic engagement of any kind, particularly with financial donations and participation in the charitable and nonprofit sectors. The blame is often shifted onto the shoulders of Millennials, as a group that is lacking motivation in giving their money, time, skills, network, and voice. (Reeve, 2013)

These assertions, regardless of how you feel or where you stand, only offer a partial look at this growing generation. There's much more to Millennials, and it all comes down to asking the right questions. As a result, my research on this journey has led to the uncovering of many contradictions shaping the perceptions and outcomes of inquiry. Contrary to popular belief, this research (amongst others) reveals that Millennials are driven by moments of inspiration, willing and eager to 'do good' if the cause truly resonates. They understand the value of the charitable and nonprofit sectors, and the importance of building authentic and personal relationships with the causes they choose to support. (The Millennial Impact Project, 2013)

Millennials are a generation that self-identify with its members' affinities as donors, advocates, and volunteers - in a space that often says they are lacking the will/desire to participate. Though the ways in which they work with causes has varied from their parents in terms of technology, communication channels, and advocacy methods; Millennials are not as self-centered, egotistical, or apathetic as some have illustrated; but rather highly educated, cause-driven, liberal leaning (as witnessed in the last federal election), collaborative in nature, and connected online. (The Millennial Impact Project, 2013)

Millennials make up a significant portion of Canada's population, workforce, and wealth. There are over 7 million Millennials in Canada aged 18-32 - accounting for almost 20 percent of the Canadian population. (R U Ready 4 Us?, Canadian Millennials, 2012) By the year 2020, it is estimated that Millennials will make up 50 percent of Canada's workforce. (Williams, 2013) For

the sake of continued growth and greater success in the charitable and nonprofit sectors, it's critical to learn how to reach this demographic of individuals gaining more control as they make up a greater percentage of the population by capturing their passions, drive, and age-specific characteristics in order to draw them into a cause. (The Millennial Impact Project, 2013)

This paper aims to make sense of the differing opinions by identify the underlying contradictions, so that charities and nonprofits may better be able to reach Millennials and their preferences in supporting causes.

Establishing Context

The Charitable and nonprofit sectors in Canada have a remarkable story to tell and are of great benefit to each and every Canadian, every day. Pick any neighbourhood, walk down any street, look out any window - and a dense mosaic of institutions and organizations - cultural, religious, social, artistic, athletic, and more make up the Canadian civic array. The charitable and nonprofit sectors aspire to reflect Canadians values sympatico with secular humanism and diversity to help implement their shared visions for a better nation. Yet charities and nonprofits have not always been successful in sharing their stories of impact with Canadians. (Imagine Canada, 2014) Canadians continue to give charities low ratings for the degree to which they report on how donations are used, the impact of programs, and charities' fundraising costs. (The Muttart Foundation, 2013)

A new narrative is forming around finding ways to attract talent, both paid staff and skilled volunteers, and financial resources to serve Canadians in communities here and around the world. (Imagine Canada, 2014)

In 2011, Imagine Canada hosted the first National Summit for the Charitable and Nonprofit Sector, bringing together over 500 people from across the country. The National Summit is a key component of the National Engagement Strategy which is about strengthening collective action on issues that will help charities and nonprofits better serve Canadians and communities across Canada and around the world. (Imagine Canada, 2012) The most significant outcome of the summit came as a result of community consultations which deemed the following sector-wide issues a priority:

1. Solidifying the financing of charities and nonprofits;

2. Attracting and retaining the best and the brightest to work in these sectors;

3. Strengthening volunteerism; and,

4. Finding new ways to talk to Canadians about the sector's contributions to society and the economy. (Imagine Canada, 2014)

In particular, the fourth point above was pivotal to the success of what charities and nonprofits were seeking to accomplish and improve upon. Together these issues painted a picture of a sector that was not well understood by communities, thus sparking the creation of annual reports with full access to the public.

Canadian charities and nonprofit organizations impact many facets of our lives and receive wide support and trust among Canadians. (Imagine Canada, 2014) In relative terms, Canada's charitable and nonprofit sectors are the second largest in the world. (Imagine Canada, 2005) There are an estimated 170,000 charities and nonprofits in Canada - roughly split between registered charities and nonprofit organizations.(Imagine Canada, 2014) Each sector has it's own set of governing rules, but a core distinction between the two is that charities are able to issue tax receipts for donations while nonprofits cannot. While having charity designation has its benefits, nonprofits don't pay tax on income or capital gains, except income from property of an organization whose main purpose is to provide dining or recreation. (Carters, 2010)

The charitable and nonprofit sectors generate $176 billion in income for Canada, employs two million people and accounts for more than 8 percent of the country's GDP. (Imagine Canada, 2012) More than 13 million people, just under half of all Canadians age 15 and over, volunteer annually - devoting two billion hours or the equivalent of just over one million full-time jobs. (Statistics Canada, 2012) Every day, Canadians contribute both their money and time to improve the wellbeing of their societies. Their financial donations help a variety of causes, such and ensuring shelters, social services organizations and good banks are able to deliver their services, universities and hospitals are able to advance medical research, and political, religious and environmental groups can have their voices heard. Volunteering also has a direct impact on the lives of Canadians, whether it is teaching and supporting children, providing health care, or supporting and giving companionship. (Turcotte, 2015) Millennials play a large part in

Volunteerism in Canada. In 2013, younger people aged 15 to 19 were by far the most likely to do volunteer work. Sixty-six percent of Millennials participated in some form of Volunteering. (Turcotte, 2015)

In 2013, the vast majority of Canadians (82 percent) made financial donations to a charitable or nonprofit organization. Among non-religious organizations, organizations in the health sector ($1.7 billion) and social services organizations ($1.6 billion) ranked second and third in terms of amount collected from individual donors. (Turcotte, 2015) When speaking with Canadians about charities and nonprofits, the conversation often focuses on social service agencies and efforts to help people overcome a disadvantage or to alleviate suffering. As necessary and vital as this work is, it is by no means a complete picture of the sector. (Imagine Canada, 2014)

What perhaps is not always as easily identifiable to the public is how far reaching the charitable and nonprofit sector are in Canada. To provide a better picture, the following quote from a report by the Canadian Council on Social Development adds some depth: "Through nonprofit organizations, Canadians build social capital; generate solutions to economic, social, environmental and cultural challenges, and forge the connections between citizens, communities and governments that serve as the basis of good government. Canada has one of the largest charitable and nonprofit sectors in the world, second only to the Netherlands. The organizations account for 43 percent of total revenues in the country in comparison to their GDP. It's far larger than nonprofit sectors in countries such as the United States, the United
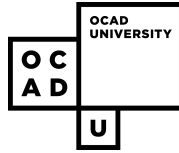
Kingdom, France, Germany, and Australia. Since the late 19th century, Canadians have turned to nonprofit organizations to address community needs and interests. In past decades, Canadian governments have increasingly partnered with nonprofit organizations to build Canada's social policies; to promote social justice, inclusion and human rights; to foster cultural expression; to protect Canada's environment; and to extend assistance to the international community."
(Canadian Council on Social Development, 2006)

Imagine Canada's national survey conducted in 2014 showed favourable results for charities and nonprofits across the country. Overall, almost four in five Canadians said that they have "a lot" or "some trust" in charities. Seventy-nine percent of the population trust charities in Canada. That trust figure far exceeds the trust levels given to the federal government at 45 percent, provincial government at 44 percent, local municipal governments at 57 percent, media at 53 percent, and major corporations at 41 percent. Only small businesses received a higher trust level at 81 percent. (Imagine Canada, 2014) Certain types of charities are trusted more than others. Health topped the list, with hospitals receiving an 86 percent trust level, and children's charities sitting at 82 percent. Environmental charities received 67 percent, art organizations - 60 percent, religious places of worship - 59 percent, and international development organizations scored significantly below the overall level of trust in charities at 50 percent. (The Muttart Foundation, 2013)

Charities are considered important by 93 percent of the population in Canada and 88 percent of

believe charities generally improve their own quality of life. While that number is at an all time

high, many donors are becoming more discerning as they want to be assured that their donation

is achieving high impact.(Imagine Canada, 2014) Overall, Canadians want to know more details

about the organizations they support, which is a positive development in terms of sparking

larger conversations that centre on taking greater action and accountability for those in need in

our societies.

Purpose of the Thesis Research

How do you define charity? The Oxford dictionary defines charity as "the voluntary giving of

help, typically in the form of money, to those in need." Merriam Webster defines charity as "an

organization setup to provide help and raise money for those in need," and Collins defines it as

"kindness and tolerance in judging others." Yet despite these definitions, there is no universal

answer we all reference, and collectively, we don't have a singular understanding of charity.

Generally, society may hold a shared vision of elements they consider falling within charity,

however the detail and depth shifts greatly depending on gender, environment, economic-status,

education, location, upbringing, religion – and most importantly, need.

As a society, we should strive to redefine what it means to be charitable by including any action

performed for the greater good of another as charity; whether it's time, health, words, skills,

resources, networks, and even smiles! Ensuring that charity is all-encompassing and supports

more people t0 participate. This view of charity grants everyone the opportunity, even if they don't have the means and have only been on the receiving end of charity all their life – a chance to be givers. As a result, by redefining the definition of charity, we are redefining the definition of a giver; and by redefining the definition of a giver, we are redefining the definition of a receiver. This idea is the true inspiration behind Charity Starts At Home. Charity can and should start with anyone – in any home, school, workplace, community, city, and country.

First, the right questions must be asked so that we may continue the process of generating larger conversations around charity; ask people what their definition of charity is and you will be amazed by the outcome.

The following are discourses this paper contributes to:
- Civic engagement around Millennials

Not only does this generation vote in large numbers, but their charitable contributions and volunteering/community service rates are much higher than those in the 1970s and '80s. (Millennials Civic Health Index, 2013) This paper aims to showcase that Millennials are a generation worth establishing rooted connections with; and as they grow older, civic involvement will likely continue to rise.
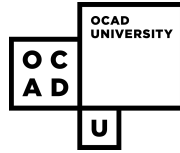
– Culture studies of Millennials

What do Millennials value and why is it important to our nation as a whole? This paper illustrates how Millennials are largely responsible for being catalysts of change; pushing boundaries of innovation in businesses, governments, and communities. They've only just begun to be recognized for their efforts in our nation and others abroad; and as their authority grows, so should their impact.

– Experience design for Charities and Nonprofits

In addition to investigating *why* it's important for the charitable and nonprofit sectors to engage with Millennials, this paper will also delve into strategies for *how* they may go about doing this. It will be about designing strategies that work for the sector and resonate with Millennials to establish steadfast solutions for ardent support.

The discourses of this research can be divided into three levels of analysis as you zoom in or out; macro, meso, and micro (Fig.1).
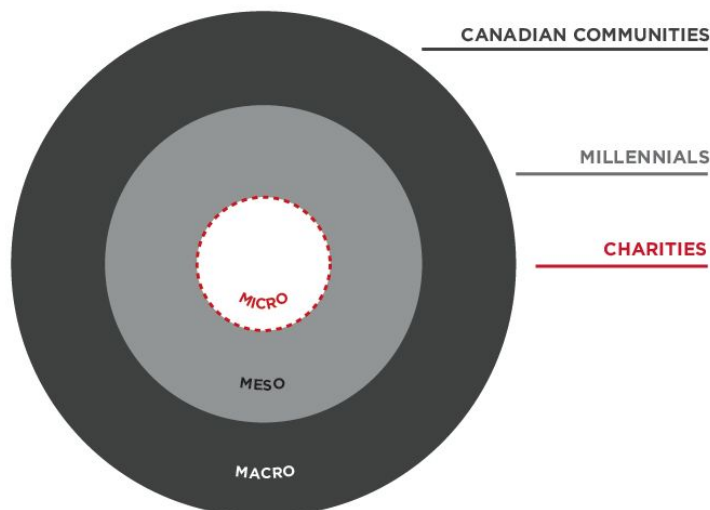
At the macro level, the research study looks at the importance of community empowerment and belonging, by shifting the way charity is defined to establish a sense of community

Fig.1 - Levels of Analysis

empowerment where giving is entrenched in society.

Zooming in to the meso level, which encompasses Millennials, it's about providing Millennials with autonomy of choice over the charities and nonprofits they support, and how they may support them.

At the heart, this research is about charities and the nonprofit sector in terms of identifying contradictions with the goal of providing insights for charities and nonprofits to have a better understanding of Millennials.

When looking at this research at the broadest level, it's about keeping in mind what kind of culture and civil society Canadians will create for the future. Beginning now, visionary leadership coupled with the dedicated contributions of stakeholders (see Fig.2 for those pertaining to this research) across Canada to promote increased giving, volunteering and civic participation would begin to generate a new culture of generosity and entrenched giving in Canada. From a corporate mindset, many organizations are adopting corporate social responsibility (CSR) in their business models to ensure they are self-regulating and tackling issues of sustainability in their

Fig.2 - Stakeholders Reinforcing Loop

practices. Surveys conducted with Millennials illustrate that a company's CSR practices influence whether Millennial's will seek to work with that organization and how long they stay. Figure 2 illustrates how these stakeholders have a direct effect on each other, creating a reinforcing loop. Eventually, through these shared actions, people will increasingly recognize their own influence as they continue to invest in their societies and strengthen Canada's social fabric. It will take time, action, and community to begin to see the first signs of change. Canadians committed to building a new culture of giving, fuelled in part by Millennials and their increasing autonomy, should act now and begin adopting a long-term perspective and comprehensive strategies. The bigger the change we hope to see, the longer we must be willing to invest, work, and wait for it. (Cardus, 2012)

Material to Anticipate

In the next chapter, this paper will explore the contradictions and challenges that charities, foundations, nonprofits, and millennials face in terms of public perception. It will be important to define the parameters and terminology addressed in subsequent chapters. After which we'll delve into how community empowerment and the donor fabric in Canada helped shape some of the research methodology approach. The paper seeks to clarify operations within charities and nonprofits while addressing public opinion about these organizations in Canada. The core of this research centres around the impact of Millennials as a critical generation in shaping the success of the charitable and nonprofit sectors in the future. The paper concludes by exploring considerations moving forward for both Millennials and the charitable and nonprofit sectors.

FRAMES OF REFERENCE

CHAPTER 02 - FRAMES OF REFERENCE

Rationale

As you have read thus far, in addition to contributing to the mosaic that underpins our society, charitable organizations are also a significant economic force and have played a pivotal role in building and defining our nation through the dedication and critical investment by citizens and communities to these varying charities, nonprofits, and organizations. (Cardus, 2012) Firmly rooted in their communities, charities bring a wide range of front-line expertise to policy issues and often speak up for Canadians who are marginalized and unable to do so themselves. Charities are called on to promote or advocate for their mission, and/or educate the public, as part of their day-to-day operations. (Imagine Canada, 2014) Despite all their efforts, sometimes the impact of charities and nonprofits is not always easy to quantify and charities don't always take up the challenge of relaying those stories of impact to the public. The quality of life that Canadians have come to depend on as citizens in a peaceful and prosperous country is directly affected by the often unseen work of the charitable and nonprofit sectors. (Cardus, 2012) While the majority of Canadians are extremely fortunate to live in one of the best countries in the world, it is for that same reason that vulnerable people and the issues they face may go undetected for so long - beneath the guise of living in Canada. Each day, the charitable and nonprofit sectors seek to improve living conditions for all Canadians.

Given the diversity of charitable and nonprofit organizations it would be difficult to provide a 'one size fits all' measurement tool. Similarly, some aspects of the charitable and nonprofit sector's work - such as contributing to social change - make measuring impact a challenge. However as we try to broaden public understanding of charitable work, it is crucial that charities and nonprofits are able to explain not just what they do but the difference they make in communities. (Imagine Canada, 2014) Charity Starts at Home is an all-encompassing term that focuses on the notion of building our communities from the inside out, and in doing so fostering the necessary complex change that supports the success of strategies enacted for the future. The 'big picture' goal for this research is for each country to progressively commit to evaluating, addressing, and improving upon their own needs first - thus shaping stronger generations of people ready to embrace meaningful change both locally and globally. Removing the negative stigma that often surrounds the word charity is critical, to bring forth the understanding that charity is simply the act of helping everyone, including yourself. Everything comes full circle when Charity Starts at Home. We are all capable alone, but more compelling together.

Questions To Be Answered

"Generosity is paradoxical. Those who give, receive back in turn. In giving of ourselves for others' well-being, we enhance our own well-being as well. By giving away our own resources, we move ourselves toward flourishing. This is not only a philosophical or religious teaching. It is a sociological fact." (Smith and Davidson, 2014)

This research paper analyses how we may *understand the correlation of millennials to charities and giving, with the aim of creating mechanisms for increased civic engagement?*

There are many essential questions in examining what the landscape of charity across Canada was, is, and will be in relation to Millennial engagement. For the purposes of conducting this research in a timely and structured manner, segmenting the questions according to Millennials or Canadian charities/nonprofits helped keep the process organized.

Some critical questions raised and answered throughout the process include;

◆ What is currently known about the civic core and charitable giving in Canada, including current donor demographics?

◆ Why are Millennials such an important demographic for the charitable and nonprofit sectors in Canada?

◆ Why should we, collectively and individually, take up the challenge of fundraising, charitable giving, and volunteering to strengthen community philanthropy across Canada?

See appendix for full list of questions. Next we'll examine which theoretical frameworks could be woven within any organizational structure in order to better engage with Millennials.

The Theoretical Framework for Millennial Engagement

The way in which Millennials engage is different from older generations. In part, this is because Millennials rely on digital media and use it more frequently and differently than other generations. Millennials not only engage with social issues, they also seek out employers who can demonstrate their commitment to communities and help solve social issues. (Saratovsky and Feldmann, 2013) The concept of engagement is multifaceted and for millennials, getting engaged means a lot more than just giving money or goods to an organization. Rather they see a range of possibilities for engagement, which can include volunteering, signing petitions, running a facebook campaign or using twitter to raise awareness. (The Millennial Impact Project, 2013) By allowing Millennials to describe how they wish to supports causes, charities and nonprofits will better be able to reach them.

The following trends have emerged and evolved within the realm of the charitable and nonprofit sectors, and are disproving a lot of preconceptions commonly made about Millennials:

◆ Millennials engage with causes to help other people, not institutions.

◆ Millennials support issues rather than organizations.

◆ Millennials prefer to perform smaller actions before fully committing to a cause.

◆ Millennials are influenced by the decisions and behaviours of their peers.

◆ Millennials treat all their assets (time, money, network, etc.) as having equal value.

◆ Millennials need to experience an organization's work without having to be on site.

(Saratovsky and Feldmann, 2013) To Millennials, charity is a way of life, not part of their life. In everything they do on a daily basis, they are engaging in some form of charitable activity; whether it's sending out a tweet, supporting a campaign, sharing a link, discussing with peers, raising awareness, attending a talk - charity is fully integrated in their lives as part of their consciousness. Arguably, Millennials have a higher awareness of being charitable than previous generations before them. Their participation levels have increased because charity for them is no longer strictly about donating money or time. In an informal way, they have expanded on the traditional definition of what it means to be charitable - and that has allowed them to better integrate charity into their lives.

Adapting an existing Framework

Kari Saratovsky - principle of KDS Strategies, and Derrick Feldmann - CEO of Achieve, recognized the rise in importance of addressing Millennials as a core demographic that will make up approximately 50 percent of the Canadian workforce by the year 2020. They co-authored a great resource in 2013, *Cause for Change: The Why and How of Nonprofit Millennial Engagement* whereby they aimed to help organizations navigate through this constantly shifting space. (Saratovsky and Feldmann, 2013) Notably, in *Cause for Change*, they introduce the 'Virtuous Cycle of Engagement' as the core to building an organization's Millennial engagement strategy. Here's what the Cycle looks like – starting with the inquisitive and conscious consumer and moving toward deeper engagement as activists and ultimately true influencers/peer agents.

At each level of engagement, with increased intensity, the number of Millennials within that

level gets smaller. This is natural with this constituent base; given all of the competing forces for

their limited time and dollars. They also tend to move from organization to organization as

different causes and interests are presented to them. It's important for organizations to

understand what messages, individuals, and tools facilitate the movement between each level to

gain perspective on the motivation behind the individual's engagement. (Saratovsky and

Feldmann, 2013) However, like all things in life, nothing is so black and white. It's helpful to

think of involving and engaging Millennials along a continuum, with each level of involvement

building on the other and increasing as individuals move from relatively little information about

causes to having deep connections with them. It was important to note that individuals can

move between different levels and be at various levels of engagement for different

issues/activities/initiatives.
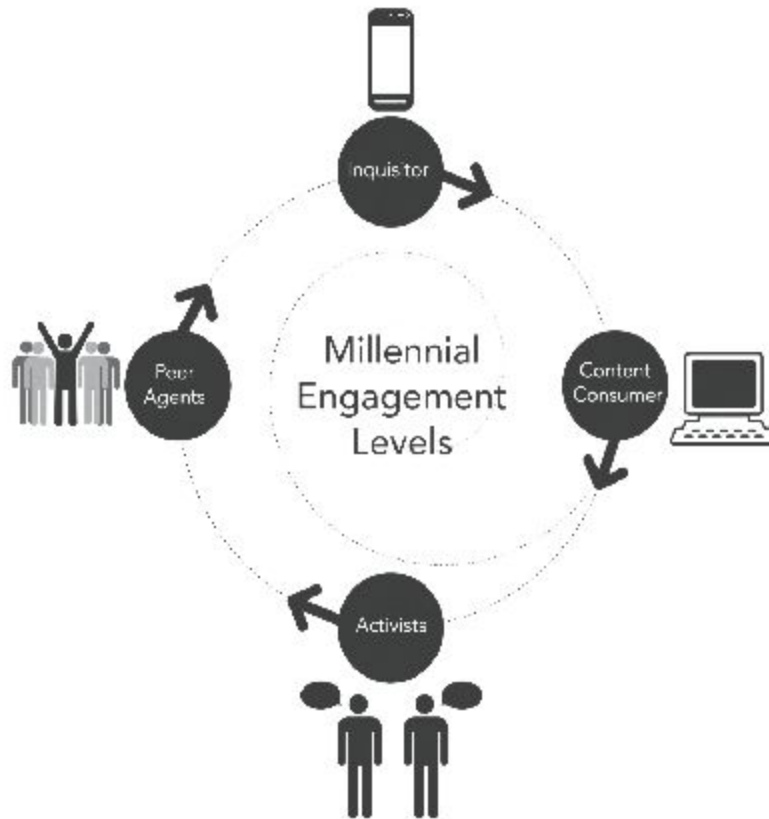
Fig.3 - Millennial Engagement Levels
(Saratovsky and Feldmann, 2013)

Due to these realizations, it was necessary to adapt Saratovsky and Feldmann's 'Virtuous Cycle

of Engagement' to better represent these realities for Millennials, resulting in a framework with

4 levels of engagement that are less rigid, called the 'Continual Cycle of Engagement' (The

United Way, 2014):

1. Awareness - at this level Millennials passively receive information from peers or media

    about a social issue. Millennials are the first truly connected generation. Awareness was

always a constant throughout all previous generations, the main difference amongst

Millennials being that they are constantly and immediately exposed to information

everywhere from more sources and have larger networks which heightens their

awareness.

2. Exploration - at this level, Millennials move beyond receiving information. They are

   interested in the issue enough to go and seek more information about it, for example

   through a website where they may engage lightly with the cause using digital tools.

3. Participation - at this level, Millennials are past the discovery phase and actively look for

   opportunities to do something that interests them. They may become:

   a. Cause champions - spreading the message through their networks to raise

      awareness (i.e., facebook, twitter, instagram).

   b. Volunteer - getting involved with short-term volunteering opportunities such as

      events, offering expertise/skills, and working pro-bono with charities and

      nonprofits.

   c. Content creators - creating blog posts, videos, photos, or programs.

   d. Financial supporters - providing financial support to charities and nonprofits.

4. Leadership - at this level, Millennials are actively seeking involvement and support of

   peers and family on causes that interest them or that they care strongly about.

In this framework what does engagement really encompass? Research has substantiated that

engagement should focus on how Millennials connect, involve, and give to and with causes they

care about. Millennials are a demographic with unique characteristics that need to be

understood in order to create long-term affinity and maximize the impact of their interest, time,

and giving.
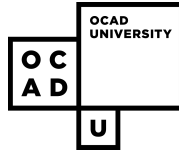
These characteristics can be summarized by building on the 'Continual Cycle of Engagement' to

devise a framework that address the actions associated with engagement; connectivity,

involvement, and giving (The United Way, 2014):

1. Connectivity

    a. Millennials connect to causes, not organizations

    b. Millennials connect to dynamic content that is current, mobile friendly, quickly

        understandable, and available when they want it.

2. Involvement

    a. Millennials want more meaningful involvement opportunities, online and on site,

        to support social causes that matter to them. That means involvement

        opportunities that:

        i.   allow them to do things with a group of friends/peers

        ii. allows them to be involved without having to make long-term

             commitments

        iii. offer opportunities that have a quick feedback mechanism to help them

             see what differences that are making > there is a direct correlation

             between the ability to impact change and the desire to get involved

3. Giving

    a. Millennials give their time (volunteer), network (share content or like something to encourage peers to read it), and resources (money and expertise/skills).

    b. Millennials treat their time, money, and assets as having equal value to a cause.

These frameworks can be embedded within any organization, business, charity, and nonprofit to ensure ensure a good foundation is set for increasing Millennial engagement. As Millennials grow in size, importance, and influence; they are provoking a shift in organizational structures, the ways in which charities and nonprofits run, and the legacy system with which they were previously operating. In order to establish sustainable strategies, mechanisms for continuous feedback and communication must be in present at all levels.

In the next section, the literature review will serve as a tool to look at the multifaceted nature of engagement, while examining both the optimistic and pessimistic views of where Canada's civic sector is headed.

LITERATURE REVIEW:

Addressing the Contradictions and Challenges

It's important to note that when I first embarked on this research study, I was under the impression that civic engagement in Canada was at an all time low because the initial sources I was turning to were perpetuating and supporting that notion. However, thanks in large part to my expert interviews and access to a lot of data from surveys their organizations conducted nationwide - I quickly learned that the landscape of charity across Canada is as strong as ever. Regardless, it was imperative to examine both aspects of this data, in order to bring those contradictions to light to conduct a deeper analysis of the landscape of charity across Canada. This literature review will serve as an inquiry into both the negative and positive assertions researchers have been making, and how both sides are in direct contradiction to each other. Similar to my own process, I will begin with the research supporting the decline to charitable giving in Canada and move to disprove it.

One of the more vocal proponents on the negative side are Cardus - a think tank dedicated to the renewal of North American social architecture, conducting independent and original research for the purpose of publishing papers for constituents in Canada and the United States. (Cardus, 2015) They surmised that warning signs are beginning to appear on the horizon, despite Canada's charitable and nonprofit sectors remaining relatively strong. They state that "*Current trends provide enough reasons for concern due to low and sharply disproportionate levels of volunteering, giving and participation by citizens - indicating that charitable and nonprofit*

sectors in Canada remain under-resourced and are entering an early period of decline."

(Cardus, 2012) They go on to say that Canadian society thrives in large part because of the civic investment practiced by a small minority of the population, characterized as 'Canada's civic core.' They maintain that strategic action is required now due to deepening trends skewing toward disengagement, and that it will be much more difficult to reverse these patterns in the future. (Cardus, 2012)

The challenges, then, are both long-term and short-term. If Cardus' predictions holds true, Canada's civic core of individuals participating in the charitable and nonprofit sectors needs to grow in the long-term. The circle of engaged citizens within this civic core needs to widen and expand to include more people. Leaders inside and outside the charitable and nonprofit sectors need to find new ways to engage people by raising awareness of these challenges so more take part in donating, volunteering and serving to advance the public good in their communities. Cardus makes the assumption that "most citizens take the health of civil society for granted,"(Cardus, 2012) and therefore citizens and leaders have to redirect public attention to real-world examples of this growing civic deficit and its impact on communities. Their main agenda is to build a case that "cultural change is needed immediately."(Cardus, 2012)

In the short-term, Cardus cites that citizens who make up the civic core need additional resources to do more of what they're presently doing well. They posit that "it may take a longer time to change patterns at a cultural level—to grow the population within the civic core—so how

can we empower contributors to do more?"(Cardus, 2012) Empowering contributors to do more should not happen by simply asking those who already committed (or overcommitted) to do more. Rather, instead they need to be equipped with resources to continue expanding the existing work they are doing within their communities. (Cardus, 2012) In an attempt to find the right balance, this project hopes to inspire an increase in civic engagement and responsibility, woven in the mosaic that makes up the nation for generations to come. It's aim is also to have charitable organizations think more deeply in terms of creating optimal donor experiences. Considerations in donor trust, motivations, and purpose are all critical in establishing the proper relationships for donor loyalty moving forward. (Community Foundations of Canada, 2015)

Canada's Civic Deficit

In the past 15 years extensive research has been conducted into the size and health of civil society in Canada. Using social scientific surveys, researchers have measured and tracked trends in charitable giving, volunteering and civic engagement. One important finding has been that Canadians take part in these 'contributory behaviours' less frequently than has generally been assumed. To be more precise, researchers have discovered the existence of a small 'civic core' in Canada—a dedicated minority of citizens who are responsible for the overwhelming majority of all charitable giving, volunteering and civic engagement. (Cardus, 2012) Often when charitable giving is discussed, the assumption is that charities are passive in their collection of donations, meaning the blame is shifted onto charities for not doing enough to ask for more donations from

the public and that they primarily rely on government funding. Yet most charities do ask people to give. Some citizens are active in their giving, seek out information about charities, and stay regularly informed. Others, however, may be more passive, or may not know how to gather information about charities. And so, charities may need to fundraise in order to both ask people for contributions, and as a way to advertise or provide more information about their goals and services. Fundraising however, sometimes carries negative connotations - as does charity - in that the public may be 'badgered' or 'pressured' to donate in on-the-spot situations. Moreover, many charities may prefer to focus their efforts on the provision of services, rather than raising revenues for their operations. This could be a direct effect from lack of resources, so prioritization in terms of spending may affect their ability to market their organization and inadvertently receive more donations. (Cardus, 2012)

The Volunteer Deficit

Popular perception regards volunteers as generous people pursuing altruistic pastimes. The real work of volunteers in Canadian society is more complex and looks much different. Their impact reaches much further than the stereotype suggests. (Cardus, 2012) Volunteering appears to be the least common form of civic engagement in Canada. Between 1987-2000 the rate of volunteering fluctuated between 27 and 31 percent of the population and has declined since then. (Cardus, 2012) The general volunteer participation rate of 27-31 percent conceals the fact that the majority of individuals who volunteer contribute only a handful of hours over the span of a year. (Cardus, 2015) By comparison, nearly half of the population in those years was

engaged civically by attending meetings or participating as members of organizations. Just under 80 percent reported making at least one monetary contribution to charity. (Cardus, 2012)

<u>The Giving Deficit</u>

Charitable giving is practiced routinely by a small percentage of citizens - which directly contradicts studies which claim that 86% of Canadians give. The studies that Cardus leverages state that charitable giving in Canada reveal comparatively low levels of giving to the charitable and nonprofit sectors. Many citizens may donate to charitable organizations in the course of a year but they often donate incidentally, and not part of a regular, planned series of contributions. (Cardus, 2012) Many who reported that they gave a donation or volunteered also stated that they preferred to contribute outside formal channels of local community or charitable organizations. They gave money directly to people in need and provided help to neighbours. (Cardus, 2012)

In addition, the gaps relating to fundraising costs and the use of donations are increasing. Over the past decade, the percentages of Canadians identifying information about fundraising costs as very important have increased steadily, while the percentages saying charities are doing a good or excellent job at providing this information have decreased. The net effect of these trends is that the information gap for fundraising costs has increased from 40 percent in 2004 to 52 percent in 2013. (The Muttart Foundation, 2013) Information gaps are closely related to levels of trust in charities. Regardless of the specific type of information, the size of the gap between
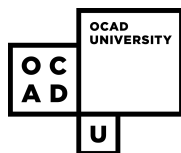
how important the information is and how well charities are perceived at providing it increases, as the level of trust in charities decreases.(The Muttart Foundation, 2013)

As my research went on, I soon realized this negativity only represented a small portion of the charitable landscape in Canada. This sharp criticism of society, charities, foundations, nonprofits, the Government, and Millennials not doing enough to take up the challenge of charitable giving across the nation was skewed with such heavy bias. Upon interviewing experts from the charitable and nonprofit sectors and being given access to recent internal research and studies, as well as being made aware of publications I had not come across before, the opposite is actually true of the nation.

A primary reason for the shift in optimism is due in part to breaking free from the financial crisis of 2008 in Canada. Support before and after the recession change drastically; attributed to lower unemployment rates, an increase in tax benefits, and better government spending on programs that helped alleviate some of the financial struggles people were experiencing. As a result, the upswing in the country's economy has continued to increase support for the charitable and nonprofit sector. The percentage of leaders predicting their organization will be better able to carry out its mission in one year's time has increased to 37 percent from a low of 30 percent in mid-2012. (Imagine Canada, 2014) The number of leaders predicting increased revenues has climbed to 22 percent from 17 percent in mid-2012. (Imagine Canada, 2014) Larger organizations, both in terms of paid staff and annual revenues, have generally had more

positive experiences and are more optimistic in their predictions for the future. (Imagine Canada, 2014)

Impact of Current Economic Conditions:

Overall, challenges due to external economic factors appear broadly in line with what has been seen over the previous two and a half years, though there have been some small shifts. Just under half of charity leaders (49 percent) agree their organizations are experiencing difficulties fulfilling their mission.(Imagine Canada, 2014) While difficulties may be down slightly, demand appears to be up. Just over half of charity leaders (53 percent) agree they are seeing increased demand for the products and services their organization offers, up from 50 percent in 2012. (Imagine Canada, 2014)

Predictions for the Future:

Charities appear to be somewhat more confident in their predictions for the future than they were 12 to 18 months ago. Rising consumer confidence carries the effect of being self-fulfilling, making households more willing to spend, which can boost hiring and output. Economists predict gross domestic product expanded 0.1 percent in August, and GDP grew 0.4 percent and 0.3 percent in June and July. (Bloomberg Business, 2015) This illustrates strength in the Canadian economy, and the recent federal election win for the Liberals has only increased that sentiment of growth. The percentage of leaders predicting their organizations will be better able to perform their mission in 12 month's time has increased 37 percent, up from 30 percent a year

ago. It is important to remember that while this shift is positive, the percentage of leaders predicting increased strength still remains below mid-2011 levels.(Imagine Canada, 2014) Although charity leaders are more likely to predict increased demand and increased ability to carry out their missions over the medium-term, there are few predictions of increases in the financial and human resources upon which they can draw. The percentages of leaders predicting increased expenditures, paid staff and volunteer numbers are all unchanged from one year, or even 18 months ago. Revenues mark the only exception. Twenty two percent of leaders predict increased revenues, up from 17 percent a year ago. While this is certainly welcome news, it remains to be seen how the predicted increase in demand will be met without corresponding increased in paid staff and volunteer resources and without increasing expenditures.(Imagine Canada, 2014) Looking at other dimensions of variation, charities in Alberta and Ontario are more likely to predict increased strength, while Quebec charities are less likely to do so (Atlantic charities are also less likely to predict specifically long-term strength). Predictions for the future tend to vary with the characteristics of charities. Philanthropic Intermediaries and Voluntarism Promotion organizations are more likely to predict greater short-term and long-term strength because of their larger revenue capacity of over $1.5 million. While Social Services organizations, who typically have an annual income under $150,000, are less likely to do so. (Imagine Canada, 2014)

It's important to remember that the real story lies somewhere in the middle. This literature review has illustrated both the optimistic and pessimistic side that charities and nonprofits will

face to varying degrees. While it's great that charities and nonprofits have an increased confidence and are reporting support for their organizations is on the upswing, it is also evident that there is an increase in demand for their products and services. Predictions of increased demand for products and services are at their highest levels since 2010, and that large demand could potentially drive organizational stresses up within the charitable and nonprofit sector. These shifts do not appear to be mirrored by predicted increases in the revenues needed to meet this demand. Sector stakeholders should keep a lookout for emergent challenges and create adaptive strategies according to that increased demand. (Imagine Canada, 2014) In addition, a close eye should be evaluating the stresses of small and medium-sized organizations who will be more likely to report higher levels of organizational stress because of fewer resources. Small and medium-sized charities represent the bulk of the charitable and nonprofit sectors, so their challenged will inevitably ripple through the charitable ecosystem as a whole.

In the coming chapters, this paper takes a closer look at defining those stakeholders and delving into their operations.

Chapter 03
RESEARCH SCOPE

CHAPTER 03 – RESEARCH SCOPE

Defining the Parameters and Terminology in Review

We have reviewed the historical context of the charitable and nonprofit sectors in Canada, established the underlying theoretical frameworks that should be embedded, and addressed some of the contradictions currently being discussed. However, prior to investigating the operational structures within the charitable and nonprofit sectors, it's important to lay the foundation in understanding some of their organizational parameters, guidelines, and definitions. The Canada Revenue Agency (CRA) is the governing body for the charitable and nonprofit sectors, and they define advocacy as "demonstrated support for a cause or particular point of view."(Canada Revenue Agency, 2012) The CRA goes on to note that "advocacy is not necessarily a political activity, but it sometimes can be." To effectively address their cause, many charities find it necessary to engage in various degrees of advocacy. This might take the form of trying to influence public opinion in a way that furthers their mission. (The Muttart Foundation, 2013) Alternatively, it might involve asking political leaders or public officials to change existing policies and/or adopt new ones. The legislative framework governing charities specifically allows them to engage in these types of activities, provided they adhere to certain rules (notably, not engaging in partisan political activity). (The Muttart Foundation, 2013)

Before moving forward, it's important to establish what is meant by charitable, political and partisan activities.

Charitable

Charities are called on to promote or advocate for their mission as part of their day-to-day operations. While it does not itself use the term 'advocacy,' the Canada Revenue Agency (CRA) recognizes that much of this charitable activity is not subject to any restrictions or limits in the Income Tax Act. According to the CRA, "when a registered charity makes a representation, whether by invitation or not, to an elected representative or public official, the activity is considered to be charitable. " (Canada Revenue Agency, 2003) This means that even if the charity explicitly advocates in opposition of or for a change in the law, policy, or decision by any level of government in Canada or foreign country, the activity is considered to fall within the scope of general charitable activities.

Political

The CRA defines political activity as a call to political action such as encouraging the public to contact a public official in support of the charity's position. Political activity must relate to a charity's purpose and charities are generally not allowed to devote more than 10 percent of their resources to political activity. (Ibid) Note: making a gift to another qualified donee to support political activities is itself considered a political activity.

<u>Partisan</u>

Partisan political activity is the direct or indirect promotion of a political candidate or party, or the direct or indirect opposition to a political party or candidate. Partisan political activity by charities is explicitly banned. (Ibid)

Legally, all Canadian registered charities are designated by the Canada Revenue Agency (CRA) under the Income Tax Act as belonging to one of three groups: private foundations, public foundations, and charitable organizations.
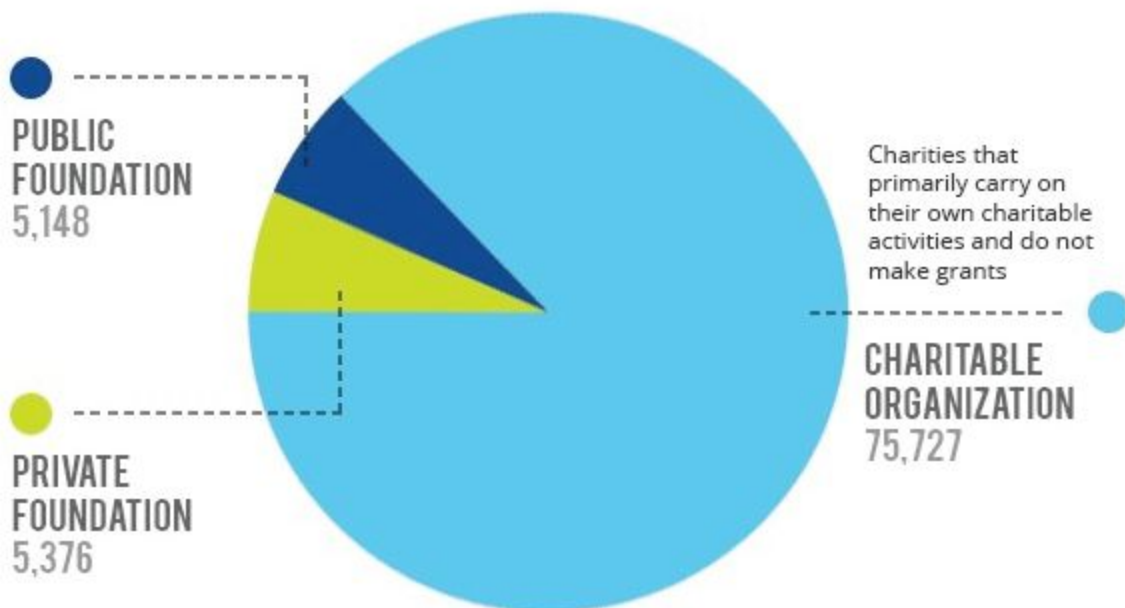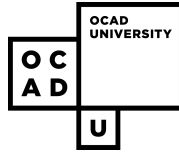
Fig.4 - Overview of the Foundation Sector
(Prince George Community Foundation, 2015)

Private and public foundations are differentiated by the independence of their directors from each other and the source of their capital. With private foundations, half or more of the foundation's directors do not deal with each other at arm's length and/or 50 percent or more of the foundation's funding comes from a person or group of persons that control the charity in some way. (Canada Revenue Agency, 2013) With public foundations and operating charities, a majority of the foundation's directors deal with each other at arm's' length and the majority of the organization's funding typically comes from arms' length supporters, which falls in line with some of the trends surrounding how Millennials like to engage with causes. Public foundations are distinct from operating charities in that they must spend the equivalent of more than half their annual income on making gifts to qualified donees. Private foundations can allocate spending to making gifts to qualified donees or on carrying out their own charitable programs as they see fit. (Canada Revenue Agency, 2013)

Nonprofit organizations are engaged at all stages of the process. They are most prominent in identifying issues in need of attention. Child poverty, poverty among the elderly, breast cancer, AIDS, famines and illiteracy, prisoner abuse, fragmentation within public and private pension systems, and the potential extinction of certain species of animals and birds - all emerge from organizations working at the community level and beyond. (The Philanthropist Vol 23, No.4)

Charitable Scope

To be evaluated, organizations had to meet a number of scope criteria:

1. To be designated by CRA as either a public foundation or private foundation;

2. To have not had their charitable status revoked; and

3. To have received more than 50 percent of their revenues from non-governmental sources

(Imagine Canada, 2014)

Social norms and market norms in the context of the charitable and nonprofit sectors are also critical to consider when creating targeted strategies. Social norms operate in our everyday relationships, while market norms drive our consumer behaviour. Most charitable giving falls within the world of social norms, which are driven by ideals of being a good person and in good standing of one's "tribe." Shopping, for example, is considered a market norm activity with the goal of maximizing self-interest. (Rovner, 2013) Some charities and nonprofits try to marry the two concepts, using marketing as a means to generate donations through selling products.

However, according to Millennial's motivations and affinities to causes, they want to see impact more than they want to buy products. Generating more widespread donor loyalty amongst Millennials should correspond with their desire to see a greater impact on a local scale. Millennials, for the most part, want to focus their efforts on a community level, and are more likely to do so if they feel a sense of belonging within their communities.

The next section further examines why Millennials feel this way, how this may be achieved, and who stands to benefit.

The Importance of Community Empowerment

Feeling connected to something larger than yourself and engagement are two important elements of belonging. Engagement is our commitment to community and the willingness to take action or participate in activities that make our communities better. (Vancouver Foundation, 2012) Surveys have proven that people who feel they belong to a community are more likely to take action with others for the common good. (Vallie Painter C, 2013) So how can we strengthen belonging to each other and our communities? Well, it's really a two-way street: Communities need to send signals of acceptance and inclusion; and individuals need to cultivate connection with other people and engagement in the community. (Vallie Painter C, 2015) The proportion of Canadians with a very strong sense of belonging to Canada is 63 percent, to their province is at 45 percent, and 32 percent to their community. (Community Foundations of Canada, 2015)

Personal Benefits

As a result, research has been conducted to investigate the effects on several aspects of a person's life when they feel connected to those around them. When we feel a strong sense of belonging and connection to the people around us:

1. We are healthier

Belonging to social groups and networks is as important to our health as diet and exercise.

People with strong support networks tend to have a lower prevalence of mental illness and

better overall physical health. (Jetten, C Haslam, S.A Haslam, Branscombe., 2009)

2. Sustained employment improves

Extensive support networks provide better opportunities for sustained and secure employment.

(Xue, 2008)

3. Children learn better

Belonging is a key element in the curriculum for early childhood education across Canada.

(Ontario Ministry of Education, 2014)

4. Life has more purpose

When people have a stronger sense of belonging, they perceive life to be more meaningful.

(Lambert, 2013)

Community Benefits

Zooming out to the community level, similarly, positive outcomes result when communities are

made up of people who feel they belong and trust each other:

1. Neighborhoods are safer

As connectedness among people in communities increases, so does neighborhood safety and a

sense of community pride. (Marmot and Wilkinson, 2005)

2. Contributions of time and money increase

People who feel they belong are more likely to volunteer, donate to the community, and be involved in community governance. (Canada 25, 2007)

3. Culture and identity flourish

Aboriginal communities that have maintained more elements of their culture and a greater level of self-governance feel more individual and community continuity and identity. (Canada 25, 2007)

4. Communities bound back after emergencies

Communities in which there are many social connections are more resilient during emergency events. (Putnam, 2000)

National Benefits

Finally, zooming out further to the higher level of Canada as a whole - the possibilities are endless when people feel a strong sense of belonging to their country:

1. Social inclusion improves

Belonging is a common indicator of how well someone has integrated into society, and helps build social cohesion within a country. (Vallie Painter C, 2015)

2. Public health improves

When more people feel connected to others in their community, individuals report higher levels of positive mental health (Mental Health Commission of Canada, 2015) and seek out health services they need when they need them. (Institute of Medicine Committee on Health and Behaviour, 2001)

3. Participation in society increases

Belonging to community, region or country influences identity and the extent to which citizens participate in society. (Employment and Social Development Canada, 2015)

What does this mean for Millennials? Millennials have underscored their priority to contribute locally within their communities. One core reason being that they feel they can better track impact while it's happening on a local scale around them, versus contributing to a cause abroad where the impact may not be as apparent or thoroughly monitored. This is also driven by their desire to help those they see in need around them, and given their confidence in the skills they possess - they are constantly looking for innovative ways to create lasting and sustainable solutions. For the charitable and nonprofit sectors, this is welcome news. Creating more local initiatives would resonate with Millennials' desire for opportunities to engage within their communities. In the next section, we'll take a closer look at the mosaic that currently makes up Canada's civic core.

The Donor Fabric in Canada

For the purposes of this paper, donors are defined as those who have made at least one donation to a charity or nonprofit during the 12 months preceding this research. This definition includes donations of money, food, clothing, household goods, and time/skills by way of volunteering. (Turcotte, 2015)

Millennials have shown that they are most likely to volunteer. In 2013, 12.7 million Canadians or 44 percent of people aged 15 years and older did volunteer work. They devoted about 1.96 billion hours to their volunteer activities, a volume of work that is equivalent to about 1 million full-time jobs. (Turcotte, 2015) A much stronger correlation existed between age and volunteerism. In 2013, older seniors aged 75 and over were the least likely to volunteer (27 percent), followed by those aged 65 to 74 (38 percent). (Turcotte, 2015) Younger people aged 15 to 19 were, by far, were the most likely to do some volunteer work, as two thirds of them did so (66 percent, unchanged from 2010). (Turcotte, 2015) Older Canadians were more likely to donate to religious organizations, health organizations, and hospitals over younger Canadians. On the other hand, they were proportionally less likely to contribute to educational organizations. (Turcotte, 2015) What may distinguish them the most from other Canadians, however, is the average amount of money they gave.

In 2013, donors aged 75 and over gave an average of $726 to nonprofit or charitable organizations, about $300 more than donors aged 35 to 44. Looking at gender inclusively, women contributed 53 percent of all donations to religious organizations. (Turcotte, 2015) In contrast, men gave more than women to non-religious organizations, $366 compared to $264 for women. Overall, 56 percent of all donations to non-religious organizations were made by men. (Turcotte, 2015)

The rate of volunteering and donating varies across Canada. In 2013, the volunteer rate was highest in Saskatchewan at 56 percent and Manitoba at 52 percent. Both were significantly higher than the national average of 44 percent. In contrast, the rate of volunteering was lowest in Quebec, sat at 32 percent of the population aged 15 and over volunteered for an organization. Quebec was also the only province with an average number of volunteer hours below the national average.(Turcotte, 2015) The highest donor rate can be found in Newfoundland and Labrador. The proportion of Canadians making a financial donation in the last year ranged from a high of 87 percent in Newfoundland and Labrador to a low 78 percent in British Columbia. The amount of donations per person per year also different throughout the country, with donors in Alberta ($863), British Columbia ($704) and Manitoba ($699) reporting higher than average financial donations in 2013. Conversely, average donations were lowest in Quebec ($264) and New Brunswick ($345). (Turcotte, 2015) It's interesting to note how neighboring provinces can see such drastic differences in donations and are not linked to the economic health of the province or the average level of disposable income.

Direct marketers had a good thing going before the Internet came along. Fundraisers could trace back nearly every gift that came in to a specific direct mail piece, phone call, or street encounter. Measuring ROI was straightforward. (Rovner, 2013) Fast-forward to the present and nothing is straightforward. Donors routinely respond to direct mail pieces by making online donations. (Rovner, 2013) Online donors switch back and forth between the Internet and direct mail. Time-honoured practices such as door-to-door canvassing and peer-to-peer fundraising are

resurging. (Rovner, 2013) And it's not just the multiplicity of channels making this confusing; it's the spider web of interdependencies, the ways communicating via one channel influence behaviours via another - making an assessment of effectiveness difficult for charities and nonprofit organizations. (Rovner, 2013)

A generalization that deserves to be laid to rest is the notion that digital is for young people and offline engagement is for old people. (Rovner, 2013) Donors give online in growing numbers but they also increasingly turn to cyberspace to stay connected with their preferred causes. The truth is, all generations value a mix of online and offline. Donors say they value receiving email from causes: overall, 59 percent say getting email updates is important. (Rovner, 2013) Also, the line between desktop and mobile continues to blur as a rapidly growing proportion of emails are opened and read on smartphones, tablets, and other mobile devices. (Rovner, 2013) This is primarily driven by the different ways in which Millennials communicate and choose to receive/retain information.

The next section focuses on research methodology conducted, and the insights gathered and used to generate strategies in the following chapter.

Research Methodology

The core research question seeks to understand the correlation between Millennials and the charitable and nonprofit sectors to create mechanisms for increased civic engagement and giving. To answer this, it was important to reach out to Millennials to assess their current understanding and motivations with respect to charity, as well as experts within the charitable and nonprofit sectors representing different industries. The methods used to answer the overarching research question was lead off by conducting expert interviews, then holding a two-day workshop with Millennials, and finally circulating a survey to experts for final insights and output assessment for future strategies.

- Expert Interviews

As an additive to the initial literature review, reaching out to experts was helpful to orient myself in the field, as well as gaining access to organization's internally valued resources in which large samples of Canadians were surveyed. These interviews also provided a critical shift in direction for the paper, shedding light on a lot of the positive data surrounding the charitable and nonprofit sector - painting a very different picture from a lot of the cynicism surrounding Millennials as a generation.

Charities interviewed included; The United Way, Plan Canada, and Earth Day. Each charity was chosen to provide a very distinct perspective of the charity landscape both locally and globally. As the interviews progressed, I noticed they all shared similarities in their attitudes and

operations, yet because they each represented a different area within the charitable and

nonprofit sectors, there were also differences between them. Some similarities present across all

three organizations included:

◆ Canada is not at an all time low for civic engagement

All three organizations provided resources, statistics, surveys, and case studies to support this.

◆ Millennials are an important demographic they're all striving to reach, but strategies

need to shift in order to increase their participation

The second core insight was that Millennials are a generation with rising importance, especially

looking five years out. All three organizations gave me access to many resources, the core take

away being that Millennials support causes - not organizations. This meant that storytelling was

vital to captivating and engaging with this group. All three organizations hold round tables,

attend events, and have think tanks devoted to studying this group.

They were also asking similar questions in looking to increase engagement with Millennials by

providing them with opportunities that truly resonate - it was just a matter of finding out what

those opportunities were and enacting them. As organizations representing different areas

within the sector, they each engage with their audiences quite differently. Plan Canada, for

example, obtains half of their funding from grants, and the other half from independent

donations and corporate giving. Corporate sponsorships are a core means of fundraising and

engaging with the public. Earth Day tends to engage with the public by creating events that raise

broader awareness. They also rely on celebrities and government officials to validate their cause

and take up the role of ambassadors on their behalf. Some similarities they all shared included plans for future events that centred around holding more rallies and TED-style talks with Millennials, while long-term plans included creating clubs/groups on school campuses which will recruit students to help organize events on a monthly basis. They all acknowledged that Millennials are a group with large networks, influence over friends and family, that want to be seen as important, have many skills that can be leveraged, and that increasingly want autonomy and responsibility. For these reasons, they are an excellent group to leverage for their leadership to widen the reach and spread the word for new causes and initiatives.

These expert interviews also revealed disparities leading to critical insights for developing strategies moving forward; by looking at what they're currently doing, what could be optimized, and where there are potential gaps to fill. Most of the differences within Plan Canada were at an operational level, being that they are a global development charity with outreach abroad. Some of their current challenges lie in obtaining new corporate sponsorships. This comes as a result of employees within organizations placing higher priority on giving back locally, which is very inline with the statistics around Millennials striving to 'do good' in their own communities. Another difference in outreach can be seen within Earth Day Canada, which uses a very multidimensional approach for participation in their campaigns. They are usually targeting those who are younger in age, with an effective use of social media mixed with volunteerism. Their success in engaging people online and in person is in contradiction to some of the challenges Plan Canada is facing around social media engagement in their Canadian offices.

They fall in 3rd place globally behind Spain and the Netherlands in terms of twitter engagement, and 7th place for facebook participation.

All three organizations provided a great foundation in my research. After concluding the interviews and conducting further research, asking questions that would help further develop the Millennial workshop and survey which would be sent near the end of the research journey. Their vast knowledge and understanding of the charitable and nonprofit sector also helped validate the recommendations I put forward at the conclusion of this paper.

   – Workshop

Since the main demographic in question in this paper are Millennials, it made sense that part of my research should seek to actually speak with members of that generation. A two-day workshop was held to canvas Millennial's general opinions and thoughts on questions surrounding charity.

8 Millennials participated in these workshops, which acted more as a focus group near the end of my research process. All 8 of them were from varying cultural, educational, and vocational backgrounds - they also brought their own experiences growing up abroad, each representing a different country from around the world.

Image Source: Millennial Workshop 2015

Some key insights emerged when we started the workshop off by asking everyone to write down

what their definition of charity is, and it's it's changed over time. Everyone had a very different

way of defining charity. A few people had a hard time putting their perspectives and

understanding of what charity meant to them in a sentence or definition. Two individuals

expressed that their way of viewing charity when they were younger has been tainted the older

they became. This was, in part, because of corruption and scandals within the charitable sector

making headlines, and their interpretation of people giving for selfish reasons to further their
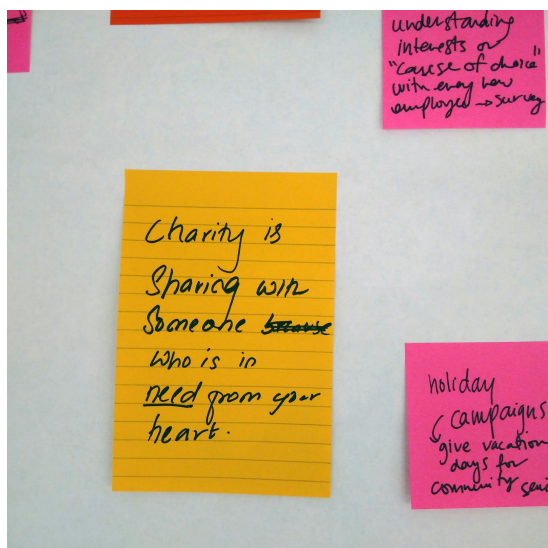
own agendas or simply to look good amongst others.

A distinction came when someone voiced that their

definition of charity is "sharing with someone who is

in <u>need</u> from your heart." When asked to explain

what that meant, they elaborated by saying that

having good intentions behind the action was the

charitable piece to them, and creating positive impact

for another was the most important attribute to

charity. Even those with a more negative take on charity agreed that if the intention and impact

is shared, that is the kind of charity they are more likely to take part in.
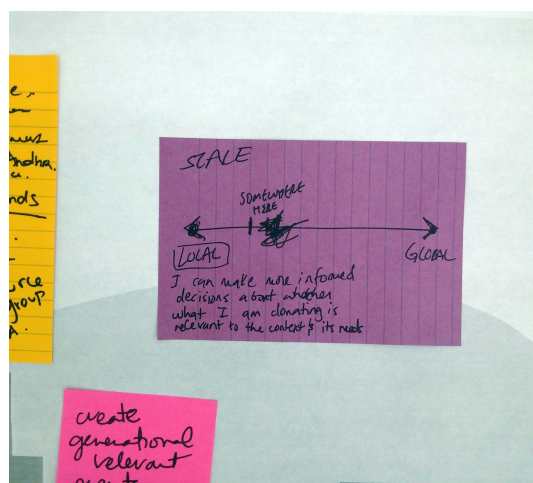
They were then asked which they value more,

supporting local community initiatives or global

campaigns. The majority of participants said they

valued supported local initiatives over global

campaigns, because it's easier to track impact and the

results are often more immediate so the difference

seems greater. This was very much in line with a lot of
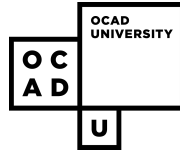
the statistics surrounding Millennials and their motivations for participation. One participant

decided to illustrate their commitment along a scale between local and global involvement, citing that they could only make more informed decisions about whether what they're donating is relevant to the context and its needs, and that their contributions tend to fall more on the local side of the scale because it's easier to assess that need. Another person candidly said that their reason for participating in charity more locally is selfish in nature because they want to feel like they're giving back to the communities

that helped them the most. They also cited that is was more convenient to participate locally, and the sense of transparency and growth that occurs as a result is measurable on a local scale. That's not to say that Millennials as a group don't value global engagement as well, there were many among the group that specifically said that they've never thought of charity as having

borders, and that as a country that is well off it is also critical to give aid elsewhere as long as that impact is measured and transparent. We then transitioned into discussing previous charitable campaigns they thought were successful. Almost everyone mentioned the Ice Bucket Challenge as a campaign they thought was great at engaging Millennials. A great outcome that resulted from having a very diverse focus group was in that they also mentioned successful

campaigns from abroad. Over the last year, all participants engaged in traditional charitable activities such as donating money or volunteering. However, they primarily supported causes through online and social media methods on a regular basis. Some participants were critical of the difference between feeling free to select their own initiatives and campaigns to support and volunteer with, rather than feeling pressured and "voluntold." Surveys conducted with Millennials suggest that they feel constrained to supporting causes and campaigns their workplaces have corporate partnerships and sponsorships with. While some don't mind it, others would prefer to choose based on their own criteria and interests. Employers can engage in deeper conversations with their employees to get a better sense of which organizations they would prefer to support, and then seek out corporate sponsorships/partnerships based on those conversations. Transparency was a topic that continued to come up throughout the workshop. Millennials want to see a greater sense of accountability, not just in terms of how or where the money is going, but where the impact is as a result of the time, skills, and money donated. The same can be said for employers and the causes they choose to designate as
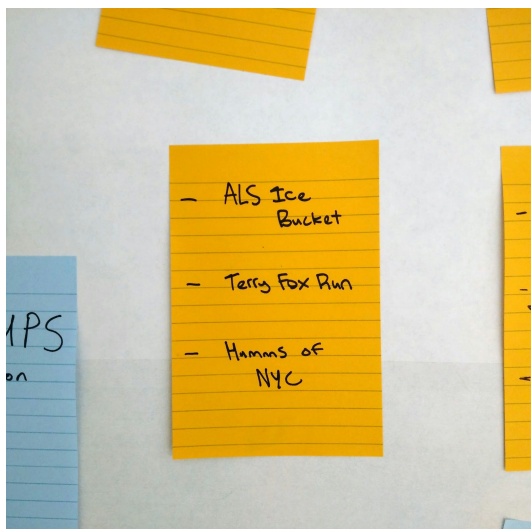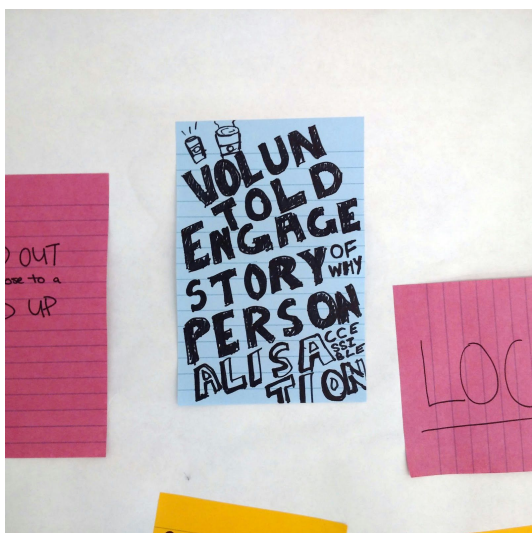
workplace partnerships. Showcasing to employees why those organizations or causes are of
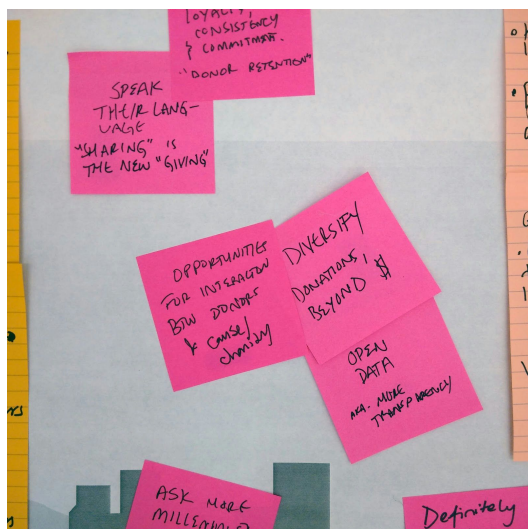
great benefit/impact will help get more people on board. As a result, employees will be more likely to engage with those causes and embrace workplace activities when they occur. Not only do Millennials want to see stories of impact, they also reiterated the importance of celebrating donor success stories for further encouragement. Another great insight generated through the workshop was the idea of personalization. We're seeing the increase of personalization as an option when it pertains to many things primarily in retail, however why not apply the same metrics that have provided success in one industry to another? Personalization, not just in choosing causes, but in terms of
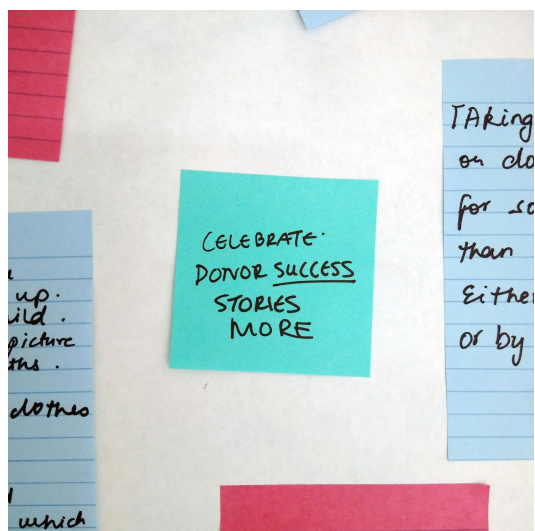
deciding how to support them. From a financial perspective, perhaps creating an employee benefits program whereby giving is more accessible and occurs automatically. Another aspect of that would be giving employees the opportunity to go outside of work to volunteer or participate in charitable activities as part of a cause work program. Overall, their insights were not only valuable in understanding Millennial's as demographic, but in considering their motivations and intentions behind supporting certain
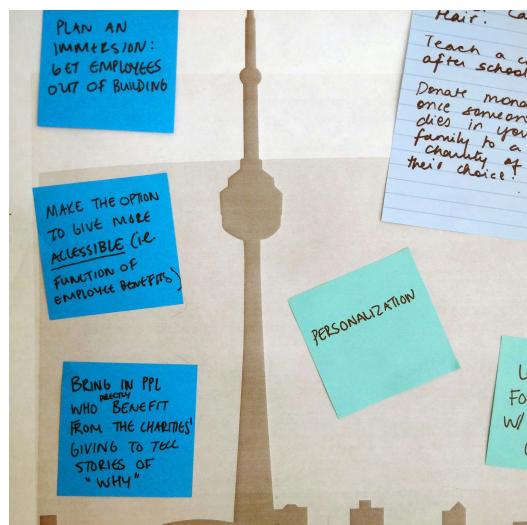
causes/organizations over others. Insights gained from speaking with them are embedded throughout this paper and helped validate and confirm a lot of the positive research statistics leveraged in this study. In addition, their participation aided in optimizing suggestions and in the selection strategies that would really resonate with them for the 'future recommendations' segment. See appendix for full list of questions asked during the workshop.

– Online Survey

The final phase in methodology invited experts from the charitable and nonprofit sector to take an online survey that takes a deeper look at the correlation between the organizations they represent and their understanding of Millennials as a growing demographic, in importance and size.

A total of 10 respondents were surveyed. Participants' names and answers were kept confidential, but the sampling included experts from:

◆ Career Skills Incubator

◆ Earth Day Canada

◆ Children's Aid Foundation

◆ Assaulted Women's Helpline

◆ Plan International Canada

◆ The Princess Margaret Foundation

◆ The United Way

All respondents were largely responsible for some form of public engagement and communication as part of their day-to-day role within their organizations. 50 percent of respondents cited their organizations efforts as focused more locally, and the other 50 percent answered globally. 60 percent of respondents considered themselves to be part of the Millennial generation, 30 percent answered Generation X, and 10 percent fell within the Baby Boomers generation. Ninety percent of respondents agreed resoundedly with the statement that Millennials are critical to charity efforts because they are a large portion of Canada's population, workforce, and wealth. When asked whether they agreed with whether Millennials primarily support causes or organizations, one organization had a great perspective to share in stating that *"It is both true and false. They definitely support causes but they also link with specific organizations that they feel support that cause. One of the challenges is that NGO organizations have specific 'agendas' related to causes that may not provide Millennials with the true picture of the cause. As such Millennials need to research on their own to evaluate their position on a cause and link with the appropriate organization."*

When asked on a scale of 1 to 10, how important it is to their organization to engage with

Millennials, all respondents chose 8 and above. They were then asked to elaborate on their

numerical selection, and these were some of their insights:

Charity x Millennials Experts Survey

This survey takes a deeper look at the correlation between charities/foundations/organizations
and Millennials as a growing demographic, in importance and size.

The overarching research question is: How may we understand the correlation of millennials to
charities and giving to create mechanisms for increased civic engagement and giving?

"It is important for organizations to engage with all Canadians. The Millennials are key as

they represent our future. But we must also engage their parents and teachers as they

influence the choices Millennials make and the causes they support." This was an interesting

distinction, saying that in order to effectively reach Millennials, it's not only about reaching

them directly but rather collaborating with the other key influencers in their life to increase

scope and probability of success/reach.

"Millennials represent - both empirically and inspirationally, a huge population for future philanthropy." This statement was resoundedly consistent and representative of all participants' views. It's of key recognition in moving forward, ensuring that charities and nonprofits are on the same page in terms of strategies that can eventually mesh well together in the sector as a whole.

"Engaging millennials doesn't always equal to straight donations but they are more motivated into hosting events and fundraisers. The focus is not just on raising money but on raising awareness on the profile of the cause." Another great distinction, because we now know that Millennials support causes in ways that exceed traditional expectations of monetary gain. For that reason, having a Millennial onboard with your cause does not always lead to direct financial gain - however the support can go a long way. Having a Millennial respect and support the cause can mean wonders for the bottom line eventually, but the first step is to have to recognize the importance of the impact that could be generated. Another organization supported this notion by also stating, *"Millennials are at the early stages of their career and tend to be social justice oriented. They have a propensity to give either through volunteering or financially. Their financial donations tend to be smaller however they are open to creating strong ties with an organization."* Their support could potentially mean more supporters from their deep networks. Awareness raised for the cause will inevitably lead to more support and more financial gain down the road.

Another key insight came from the recognition of Millennials as changemakers with real impact on the ways in which charitable organizations operate: *"It is critical to mobilize and engage millennials in the work we do since they will be the decision-makers of the future on sustainability and development. They are also very globally minded and it's important to us to engage them from both an advocacy and fundraising perspective. They have a voice to make change at different levels of government but also within their communities."* This statement coincides with the majority of research conducted through surveys engaging Millennials. Their high connectivity with their networks, communities, and countries around the world lend itself well to having wider global perspectives on a multitude of issues. They are constantly looking for ways to engage more sustainably within their own practices and in the places around them. As a charity or nonprofit, tapping into Millennial curiosity and their connectedness is important. They have solid opinions and perspectives that can be leveraged to further a cause and it's impact.

Participants were also asked what some methods are presently being used in their organizations to engage with Millennials; email, social media, and targeted campaigns were among the top three. The majority of respondents agreed that they could try to improve upon their use of social media for engagement, volunteer opportunities provided, and special events to bring together Millennials and their communities. Respondents were also asked to rank the 3 most important attributes (in their experience) of a charity that Millennials value, and almost unanimously they chose impact of cause/initiative, transparency, and feeling like they're making a difference.

Most respondents said their organizations post annual reports made available to the public through their website, and in addition are providing people with more insight into how their financials are spent. However, as research in this study has suggested, older generations are more interested in seeing the financials behind organizations while Millennials want to see impact. There is an opportunity for organizations to shift their priority in publishing more stories of impact and details of how their initiatives are helping causes in addition to where and how the money is being spent.

When asked on a scale of 1 to 10, how important donor retention was to their organizations, 90% of respondents answered by selecting 10. The percentage remained the same when respondents were asked how important Millennial retention was to their organizations. Overwhelmingly, all respondents were also in favour of supporting and prioritizing Millennial-specific strategies to expand their scope and influence. Investigating their suggestions and inputs has helped inspire much of the strategy development in this paper which can be seen in the following chapter.

Chapter 04
FINDINGS

CHAPTER 04 – FINDINGS

The Impact of Millennials on Operations within the Charitable Sector

"I find that it is dangerous to overgeneralize this demographic. We have encountered many who are thoughtful, resourceful, open-minded, and even visionary community stewards… Our challenge is to personalize the impact and engage them in ways that engender ownership and investment." - Greg Johnson, Chair and CEO, Damar Services

As we have already noted in this paper, Millennials already support the nonprofit sector in various ways and their rates of civic participation are the same or higher than older generations. (The United Way, 2014) The average annual contribution to causes or charities that Millennials make is $639 per person, which is valued at almost $2 billion as of 2013. (The United Way, 2014) 2012 data demonstrates that national rates of "civic engagement activities" for youth 18-34 closely mirror those of the older cohort, although they are slightly more likely to have volunteered. (The United Way, 2014) However, the way in which Millennials engage is different from older generations. In part, this is because Millennials trust digital media and use it more frequently and differently than other generations to actively promote causes. Millennial Canadians between the ages of 18-34 use online technologies to discuss politics in much greater numbers and are more likely to rely on social networks as a major source for news. (The United Way, 2014)

Whether discussing big, philosophical issues such as how to advance philanthropy in Canada or more tactical topics like trends in fundraising programs, it's apparent that the Canadian charitable and nonprofit sectors are facing new optimistic horizons. (KCI, 2012) Just as it is important to consider the future, Charities must have peripheral vision. A manifestation of peripheral vision is recognizing that when it comes to raising money, it's more than just about programs like major gifts, annual fund and special events, usually at the core of generating philanthropic support. (KCI, 2012) Charities commonly provide current and prospective donors with a range of information to solicit and retain their support. Providing information that makes the case for support and shows the charity's impact is important for recruiting and retaining donors. (The Muttart Foundation, 2013)

Similarly, failing to provide supporters with adequate information may lead them to give less than they otherwise might, or stop donating completely. (The Muttart Foundation, 2013) It may seem provocative to encourage charities to ask less, especially considering that the most commonly cited reason for not making a charitable gift is 'nobody asked.'(KCI, 2012) Yet, it's important to balance this with the myriad evidence that tells us that over-solicitation is one of the most commonly cited reasons for ceasing to give to a charity. (KCI, 2012) In attempting to find the right balance, it's helpful to think in terms of creating an optimal donor experience. In an effort to build customer loyalty, perhaps rather than suggesting that charities should ask less, we should consider how charities can 'ask better' or 'ask smarter.' (KCI, 2012) Programs like

monthly giving where a donor is solicited once with ongoing stewardship feel like a smarter

solution.

In examining how Millennials engage with causes, it was important to decide what 'engagement'

really encompasses. Research for this paper has helped determine that engagement can be

summed up by how Millennials connect, involve, and give to causes they care about. Connection

includes how Millennials discover and communicate with a cause, ranging from the first time

they sign up for more information to their actions on mobile communication and social media.

Involvement includes small actions, such as microvolunteering - easy, quick, and no (or low)

commitment online or offline actions to benefit a cause - all the way up to board leadership.

Giving includes both smaller and larger donations, as well as peer fundraising and soliciting

donations on behalf of the cause. These forms of action and interaction - connect, involve, give -

combine to help us measure and understand Millennial engagement. (The Millennial Impact

Project, 2013)

Throughout this paper's development, the following observations emerged:

<u>Millennials engage with causes to help other people, not institutions.</u>
Friends and peers motivate a Millennial's passion for a specific cause. In addition to peer

influence, involvement is inspired by how the Millennial can visibly cause some sort of change or

tangibly help change someone's life for the better. Millennials' top motivations for getting

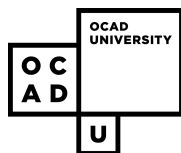involved or volunteering with a nonprofit included working with a cause they are passionate about, meeting new people who care about the same cause, and being able to lend pro-bono skills and expertise to an issue or cause. (The Millennial Impact Project, 2013) Whether it's locally or abroad, Millennial's are more likely to engage with a cause if the need and impact are clearly communicated. This is also how they will leverage their own networks to participate as well, if they feel they can transparently identify what the ask is and how they may be able to help or ask others to help.

Millennials are influenced by the decisions and behaviors of their peers.

Peer influence plays an important role in motivating Millennials to volunteer, attend events, participate in programs and give. (The Millennial Impact Project, 2013) The vast majority of Millennials prefer to learn about volunteering opportunities through their peers. And even if Millennials can't give as much as other demographic groups, they're willing to help raise funds for causes they care about, usually by activating or helping to activate social networks on the part of charities. (The Millennial Impact Project, 2013) It's not enough for a charity or nonprofit to assume that their cause will be important enough in the eyes of Millennials to attract them on a singular basis. The style in which Millennial's view/receive information has also changed - long scrolling lists viewed at a glance. Realizing the ways in which Millennials share/view information with one another can help in creating specific content that resonates immediately. In reality, charities and nonprofits are competing with so many other media sources, retails
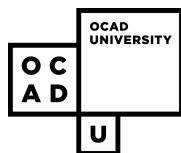
brands, and other organizations for the attention of Millennials. So in effect, you have a very

short window of time to captivate Millennials amidst their long feeds of news/information.

Millennials treat their time, money, and assets as having equal value.

Millennials see assets related to time, money, skills, etc., as having equal value when given to a

cause. Interestingly, survey results show that Millennials consistently view both their network

and their voice as two additional types of assets they can offer a cause. Aided by technology, an

individual who donates his or her voice may still give skills, time, and money, then go beyond

these actions to advocacy. Donating one's network involves capitalizing on professional and

personal relationships to expose others to a cause. (The Millennial Impact Project, 2013) This

means that traditional ways of perceiving support needs to change. Millennials view support in a

multidimensional way, equating all vehicles for support as similar in importance. Creating

multidimensional means for people to support a campaign through many avenues will ensure

greater championing among more people for that cause.

Perceptions of the importance of charities and the way they conduct their work also play an

important role in structuring opinions and attitudes about charities. Within the charitable and

nonprofit sectors, there appears to be a general belief that the more important Canadians think

charities are and the more they agree with how charities conduct themselves, the more willing

Canadians will be to support them through contributions of time and money and the more

trusting Canadians will be of both charities and their leaders. (The Muttart Foundation, 2013)

Views on the importance of charities vary most significantly by Canadians' gender and level of formal education. Women have more favourable opinions regarding charities than men and are more likely to agree with almost all statements in this section. For example, 96 percent of women agree charities are important to Canadians, compared to 91 percent of men. The only exception is the question asking whether charities should be expected to continue to deliver programs and services that government stops funding. (The Muttart Foundation, 2013)

Canadians' opinions on how charities spend their money are less favourable. When Canadians evaluate charities and nonprofits they often focus on financial details - which of course are import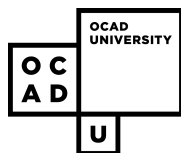ant - but sometimes do so at the expense of considering an organization's impact. (Imagine Canada, 2014) Generally, Canadians seem to agree that charities are very good at spending money wisely (51 percent somewhat agree and 9 percent strongly agree). In spite of this, there is an extremely widespread perception that the amounts charities spend on salaries and administration are too high. Nearly three-quarters (73 percent) of Canadians believe this (23 percent agree strongly and 50 percent somewhat agree). Canadians tend to have specific and often unrealistic expectations about how much charities need to spend to be effective. This situation has likely been exacerbated recently with the emergence of charity ranking and rating organizations that often rely on low overhead expenses as a measure of success. (Imagine Canada, 2014) It is difficult to understand how Canadians simultaneously hold these two seemingly contradictory opinions, yet large numbers do — fully half somewhat or strongly agree with both ideas simultaneously. (The Muttart Foundation, 2013)
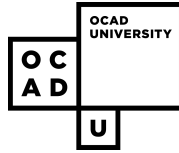
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It is going to be a challenge to reconcile these opinions with the realities of the charitable and nonprofit sectors. Charities do not operate in a different universe than governments and business - one in which hard costs such as rent and wages do not exist. What if other professions were evaluated only on their inputs? If you were presented with a list of all the teachers in a school and the amount of money they spent on their classrooms, would you automatically assume the teacher who had spent the least was the best? Likely not - you quite rightly would want additional information such as how well the students did on tests, how many graduated, etc. It seems unreasonable to apply this metric to charities and nonprofits.(Imagine Canada, 2014) This growing interest in overhead expenses is occurring at the same time many funders are shifting their support to specific projects as opposed to general mission support. (Imagine Canada, 2014) The same can be said for how Millennials support the charitable and nonprofit sectors. Millennials prefer to support causes and specific missions rather than whole organizations. It also mirrors opinions in elections - that issues should be voted on - not parties. Having a good understanding of Canadians' opinions around fundraising is important because the relationship between charities and prospective donors is so key to the sector's capacity to carry out its work. (The Muttart Foundation, 2013) By comparing Canadians' views of the importance of various forms of information with their views of how effective charities are at providing this information, it is possible to gain further insight into areas where charities may be falling short. (The Muttart Foundation, 2013)

<u>Millennials prefer to perform smaller actions before fully committing to a cause.</u>

The majority of Millennial volunteers and donors seem to enter a cause by first completing smaller actions rather than making a long-term commitment. Millennials are more motivated to "Like" a Facebook page, share a video or attend an event before participating in higher states of engagement. But the stronger their relationship with an organization, the more likely they are to give larger gifts over time. (The Millennial Impact Project, 2013) Millennials' interactions with nonprofit organizations are more impulsive and immediate. When inspired, they will act quickly – from small donations to short volunteer stints – provided that the opportunities are present and the barriers to entry are low. (The Millennial Impact Project, 2013) Millennials are consistent in their desire to see exactly how time, talent and dollars translate into people helped. They want their contributions, no matter the type or amount, to achieve actual results for a cause. Members of this generation are more likely to give smaller amounts to multiple organizations than to focus their giving on any one recipient. (The Millennial Impact Project, 2013) Millennials are most likely to give volunteer time if they know their efforts will make a tangible difference in someone's life. They tend to get "hands on" with causes they care about when an organization can offer a range of volunteer opportunities, from one-time, episodic commitments to long-term, pro-bono or skills-based opportunities. Ultimately, they want to lend their knowledge, expertise, and time to help the people or issues the organization touches. (The Millennial Impact Project, 2013) Statistics have proven that when Millennials form long-term volunteer relationships with organization, they tend to give larger gifts and encourage more people from their own networks to contribute as well.
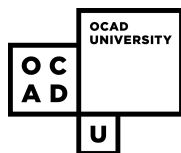
Political Activity within the Charitable Sector

In the spring of 2012, some politicians and the media questioned the right of charitable and nonprofit organizations to contribute to public policy debates. The sector argued strongly to the contrary, noting that charities are firmly rooted in their communities and bring a wide range of expertise to public policy issues and speak up for Canadians who are marginalized and unable to do so themselves. It would be detrimental to the country if we created an uneven playing field, restricting charities' public policy engagement while continuing to facilitate lobbying by corporations. An engaged and informed citizenry is a prerequisite of a health and robust democracy. (Imagine Canada, 2014) We never know where the next good idea is going to come from and ensuring that front-line organizations have the capacity to develop and share policy recommendations and participate in the process helps maintain a wide-open and innovative marketplace of ideas that Millennials could thereby contribute to. Millennials are constantly pushing the legislative envelope, provoking change in the ways charities operate to place core priority in creating impact.

Why is it important that charities contribute to policy decisions?

Charities in Canada have a long and proud history of public policy work. For example, health charities were instrumental in advocating for smoke-free environments and substantially reduced tobacco consumption. Similarly, charities have contributed to the creation of the Registered Disability Savings Plan, the Canadian Initiative for Maternal, Newborn and Child Health, the treaty to End Land-Mines and the Canada-United States acid rain treaty. (Imagine
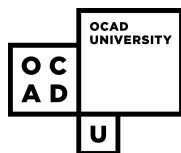
Canada, 2014) It is this kind of change that Millennials strive to share and contribute to. The stakes are higher for charities in their ability to see change through with a generation that keeps a watchful eye on any and all progressions towards those shared goals.

How many charities engage in political activities?

According to Imagine Canada research in 2010, "just over a third (39 percent) of charities engaged in permitted political activities over the previous year. In terms of specific activities, charities are most likely to encourage the public to contact elected representatives or government officials (22 percent) or to make a statement to the media (19 percent)… most organizations engage in these activities irregularly (40 percent) or a few times a year (37 percent) - just 6 percent engage in them a few times a week or more." (Imagine Canada, 2010) There are deeper implications for charities, as Millennials are pushing them towards enacting change and sustainable impact rather than focusing on self interest or internal goals related to the charities themselves.

What does this mean overall for the charitable and nonprofit sector?

Organizations must be proactive in demonstrating that they operate transparently and are publicly accountable. As a sector, charities and nonprofits need to do a better job at educating Canadians about not only the value of charitable and nonprofit work, but the realistic costs associated with their often complex and varies organizations' programs and services. (Imagine Canada, 2014) In addition, the more charities advocate for complex change and profound
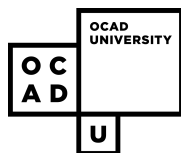
impact, the better support they will receive from Millennials on all fronts. This means engaging

with Millennials by creating multidimensional methods in which they can demonstrate their

support and champion the cause amongst their networks.

Addressing Public Opinion in Canada

Public trust is of central importance to Canadian charities. It underpins many key relationships:

with donors, volunteers, clients, policymakers, regulators, and corporate sponsors. High levels

of trust provide charities with greater freedom of operation and result in higher levels of

support. Declining or low levels of trust may result in lower levels of public support and in more

oversight and constraints being placed on how charities operate. (The Muttart Foundation,

2013) Canadians place a high degree of importance on monitoring how charities spend and raise

their money. Substantially all Canadians (92 percent) believe more attention should be paid to

how charities spend their money (64 percent strongly agree and 29 percent somewhat agree).

Slightly fewer believe more attention should be paid to the amounts of money charities spend on

program activities (86 percent) and professional fundraisers (85 percent). Of these two needs,

increased attention to the amounts spent on professional fundraisers appears to be the greater

priority, as shown by the higher numbers strongly agreeing this should be a concern (52 percent

vs. 43 percent for spending on program activities). (The Muttart Foundation, 2013)
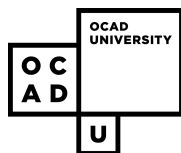
<u>What are charities themselves doing to show that they are transparent and accountable?</u>

Canadian charities are required to publicly account for their organizational activities and finances, including information about fundraising costs and staff compensation. (Imagine Canada, 2014) Many charities make their financial information, audited statements, and annual reports available online. Others make that information available to donors who inquire. Charities rely on the trust and goodwill of Canadians and it's in their best interest to remain as transparent and accountable as possible.

Those who are older are generally more likely than those who are younger to see a need to monitor charities' activities. For example, 73 percent of those 65 and older strongly agree more attention should be paid to the ways charities spend their money, compared to 64 percent of Canadians generally, and just 55 percent of Millennials. (The Muttart Foundation, 2013) Trust in charities is highest amongst Millennials: 79 percent of those between 18 and 24 years of age and 77 percent of those between 25 and 34 years of age say they have some or a lot of trust in charities. (The Muttart Foundation, 2013)

While learning more about donors and their attitudes, behaviours and motivations is interesting in and of itself, what's most important is what that knowledge enables charities and nonprofits to do. Armed with more robust information about donors, organizations can create donor segments, targeting cultivation and solicitation activities to better match each segment's needs and wants. The concept of picking segments leads to another important point: it's unrealistic to

think that every donor is going to be a lifetime donor. So charities and nonprofits should not come to expect it. In reality, all organizations probably have three types of donors - one time, episodic, and long-term. (KCI, 2012) As a result, it's crucial to track the different motivations and entry points for giving to help charities and nonprofits understand who is most likely to give regularly, as well as who may give only once or twice. This should be of priority when it comes to interacting with Millennial donors. Since we know that Millennials connect with causes over organizations, they are a harder demographic to count on for long-term support. Their efforts should be focused on segmenting Millennials, identifying their habits and behaviours, and applying the right strategy to each segment according. This will ensure that charities and nonprofits are not trying in vain to turn a classic 'one-time or episodic' Millennial/donor into a lifelong donor. Saving donor retention and loyalty strategies for those with a greater likelihood of giving over the long term. It's important to note that most donors, spanning from every generation, fit within the episodic category of donor types. Therefore as Millennial's continue to advance the ways that charities engage with the public, the strategies they utilize to do so can apply to more than just Millennials. These strategies may bring to bear people from all generations and groups.

Connecting donors to an organization's mission and impact lies at the centre of prioritizing donor experience. (KCI, 2012) And so ultimately, the key to better managing and optimizing relationships with donors at all levels of the organization will be to bond the 'hard' (analytics, segmentation) with the 'soft' (engagement strategies, the art of communicating in ways that
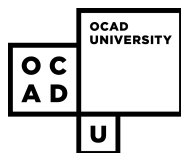
maximise donor experience). The sweet spot lies at the intersection of the two. (KCI, 2012) It

will be crucial for all charities and nonprofits to work even harder in the future to ensure that

relationships with Millennials and donors are sound and able to continue to attract

philanthropic support in the long term.

Millennials don't need to be on site to experience a cause's work.

Millennials have notably grown in their desire for and attraction to imagery and video. They use

these media elements to vicariously experience the need and see how their small action can help

alleviate it. To create this valuable opportunity, visuals must focus on the story behind the cause.

More than 60 percent of Millennials said they felt most invested in a cause when the nonprofit

shared a compelling story about successful projects or the people it helps. In 2012, many

participants in the study said they would give to whatever inspires them in the moment. (The

Millennial Impact Project, 2013) Equally important as the visuals and compelling stories is the

platform on which those elements are delivered. Once Millennials engage through social media,

they greatly prefer donating through a specific online donation portal. Social media is not a

preferred platform for donating. Millennials have given or want to give online via an

organization's website; in-person giving was the second most preferred method of giving. (The

Millennial Impact Project, 2013) Mobile technology continues to grow in importance for this

generation, as it gives them instant access to their preferred channels at any time.
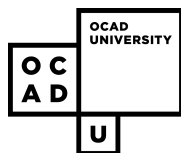

Building relationships has always been an anchoring tenet in how to think about and approach

donors. And more recently, organizations have also oriented their thinking around the very

useful concept of making sure that they are being 'donor-centred' in their approach and activities. (KCI, 2012) While maintaining terms like stewardship and donor-centredness is important, there are some new ideas being added into the mix - things like gathering donor insight, understanding donor behaviour and optimizing the donor experience. These different ways of thinking about donors are all areas to which smart organizations are devoting 'think time' in an effort to build stronger, longer and deeper relationships with their donors at all gift levels. (KCI, 2012) Central to these ideas is one theme - the need for charities and nonprofits to better know their donors. In order to do this, organizations need two things: the first is to adopt an orientation that is curious about their donors and anxious to learn as much about them as possible. The second is data. (KCI, 2012) To be successful, gathering donor insight cannot be viewed as an event, but rather as part of an ongoing shift towards creating a 'culture of curiosity.' (KCI, 2012)

Companies increasingly approach employee culture and corporate responsibility as important assets that inspire retention, productivity and a variety of other organizational benefits. Millennials' preferences in the workplace - how they engage with their company and what they look for in corporate cause work, with 'cause work' meaning the programs and initiatives companies execute that help people and communities. As companies and nonprofits work together more and more employers include cause work in their values, research is needed to understand the next generation of employees, their attitudes and their preferences for company cause work. (The Millennial Impact Project, 2014) Companies need to build relationships with

Millennial employees from the beginning to spark their passions and create opportunities to engage both their professional and personal interests. (The Millennial Impact Project, 2014) Charities and nonprofits should partner with companies to develop a triple platform of involvement - company-wide, department-based and interest driven - through the workplace. When given a list of ways to be involved in company's cause work, 94 percent of Millennial employees preference using their individual skills and talents to help a cause.
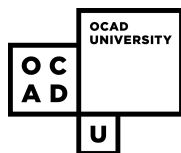
Top three cause-related programs or actions Millennials wanted to see more of at work (The Millennial Impact Project, 2014):

1. Company-wide volunteer opportunities

2. Sabbaticals (a break from work to serve and volunteer)

3. Cause projects within departments or teams

This illustrates the importance in understanding the employee experience through the Millennials lens and better understand what is working well and what we can do to continue to improve their experiences. This provides a great opportunity for new partnerships, where charities and nonprofits engage companies - not just as donors, but to provide these incentives and value adds for companies and their HR recruiters. (The United Way, 2014) Moving forward, this paper will take all the insights gathered in this research process and translate them into strategies moving forward. The next section will highlight their importance and relevance for Millennials, charities, nonprofits, and organizations.

Chapter 05
CONSIDERATIONS

CHAPTER 05 – CONSIDERATIONS

Overall, this paper will conclude by highlighting the importance of engaging in more analysis on giving and charitable operations with Millennials and within organizations.
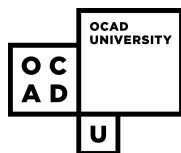
Strategies Moving Forward

Consider the following takeaways for better engagement with Millennials:

1. The question charities and nonprofits should be examining is how to inspire Millennials to work through and with causes, rather than for the charity and nonprofit itself.

Millennials prefer to be involved in cause work at their own pace, rather than long-term volunteer commitments sponsored by a charity or nonprofit. Millennials don't like to be 'voluntold,' an insight that came up a lot during the two-day workshop I held. Millennials also constantly challenge the relevance of the work that charities and nonprofits do. Millennials know they can do beneficial things for causes, issues, and people without actually working with or within that charity or nonprofit - giving them opportunities to get involved.

2. From a communications standpoint, charities and nonprofits need to invest time and resources into helping Millennials feel, experience, and the impact of the cause.
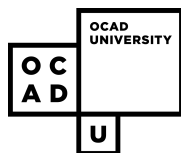
Investments by charities and nonprofits in photography, video, digital storytelling, experiential

learning, and other visuals are worthwhile to inspire more Millennials to take up their cause and

share within their networks.

3. It's up to charities and nonprofits to equip Millennials with resources (video, information,

statistics) to help them spread the word within their networks.

Through their engagement with causes, Millennials collectively have taken on the role of digital

marketers for issues. Unlike with previous generations, tools such as social media and peer

fundraising put cause marketing in the hands of their constituents. (The Millennial Impact

Project, 2014) Since Millennials are taking on this marketing role in an unofficial capacity, they

are creating what can best be described as a grassroots movement.

4. Millennial preferences are becoming more than just preferences - they are becoming the

social norm.

Millennials are influencing how charities and nonprofits communicate to all audiences. We're at

the point where marketing and messaging will lend themselves more to the Millennial style of

communication. (The Millennial Impact Project, 2014) Charities, nonprofits, and organizations

can no longer afford to cater only to older donor and volunteer segments. Today, younger

audiences demand that the causes they support evolve and show true change and impact in the
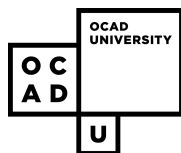
issues they address.

Millennials will inevitably be spending a great deal of their day at work, so how can that time be leveraged for good? We've studied Millennials as individuals who participate in social causes. Now we have a clearer picture of how their desire to 'do good' is reflected in their employment - from the companies they consider in an initial job search to the effect an employer's cause work has on overall job satisfaction. The idea isn't to be recognized for doing good, rather, the point is to be able to do good and make a tangible difference through the workplace. (The Millennial Impact Report, 2012) As time progresses and Millennials move from being a small, unique segment of the overall workforce to the predominant source of employees, understanding this picture will be crucial in the ability to recruit and retain the best people.

After sifting through the data and findings from various surveys, research papers, and expert interviews - and in congruence with the Millennial Impact Report - companies can benefit from doing the following actions:

◆ Embrace a three-pronged approach to company cause work. Focus on providing the following three specific types of service opportunities: 1) company-wide days of volunteering, 2) department/team service projects, and 3) opportunities to use individual skills or interests to benefit a cause of their own choice.

◆ Offer a wide-range of cause work actions. Allow Millennials to perform both small actions from their desk, as well as larger projects with others.
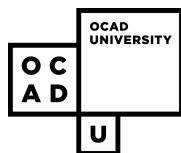
◆ Prioritize storytelling to demonstrate impact. Don't let Millennials assume the
   differences their volunteering and giving have made; show them who benefited from
   these actions and highlight individuals who made a difference.

Millennial employees' preferences are already being reflected in forward-thinking and
innovative organizations across the nation. Companies that recognize and nurture their
Millennial workers' passions and talents are seeing a more committed workforce, a strong
bottom line - and a difference in the world based on their cause work. (The Millennial Impact
Report, 2012) It's not enough for a company to talk about their corporate social responsibility
endeavors to gain public relations points. Millennials pride themselves on seeing through those
fake facades - they want to see impact. To create a culture of cause work that inspires better
Millennial recruitment and retention, companies must offer employees meaningful
opportunities to give, be involved, and connect with one another and with the cause.
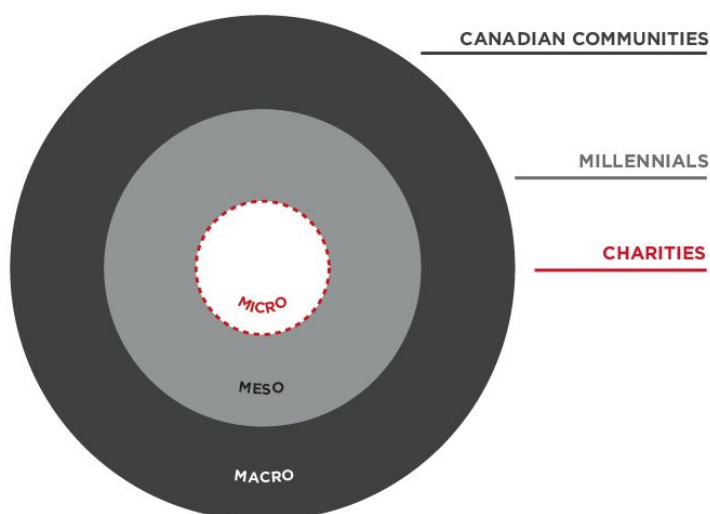
The discourses of this research have shown that though the charitable and nonprofit sectors remain at the heart of any change that should take place, they need to activate the help of Millennials and their communities to foster change
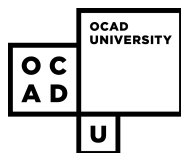
Fig.1 - Levels of Analysis

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and engagement on a national level. At the macro level, community empowerment is essential to generating the deeply rooted change charities and nonprofits are seeking. This paper has shown how communities may better be engagement when everyone feels a sense of belonging entrenched in their societies. Zooming in to the meso level, engaging Millennials and treating them as a demographic that could be leveraged for their skills, time, leadership, voice, and networks will be critical for the charitable and nonprofit sectors. This paper has demonstrated Millennials' importance as a generation that is continuously shifting the way in which organizations operate. Demonstrating impact will be crucial in keeping Millennials engaged.

At the end of the day, this research should help to serve the charitable and nonprofit sector in terms of observing Millennials through a new perspective of importance. The kind of change they should be seeking is collaborative and complex, but well worth the work. It's important to remember that no matter the circumstance, we are never alone, and when people, communities, and nations join forces - we are all the more powerful for it. Change is tricky, because it's always happening. The charitable and nonprofit sectors should seek to constantly tap into the best human nature has to offer - human kindness. The goal should be to inspire this young generation of Millennials to support causes that help improve the lives of those around them, and give the vulnerable a voice that sees them reaching their aspirations.
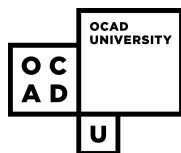
The Future

As Charles Darwin said, "*It's not the strongest of the species who survive, nor the most intelligent, but the ones most responsive to change.*" As a result, the status quo is no longer sufficient and the charities, nonprofits, and organizations that will thrive in this ever changing environment will need strong peripheral vision. What does having strong peripheral vision look like in the context of fundraising? It means questioning assumptions, being open to and curious about doing things differently, and taking a longer term view of planning. That might be a hospital foundation and allied health charity pitching a joint project to a single donor. Or one social organization partnering with another agency to deliver a program that would be beneficial to its clients. Or even two or more cultural organizations coming together to jointly mark a special occasion like the UN Decade of biodiversity. Strong peripheral vision requires leadership to go beyond the myopic view of the organization as a single entity to one that explores new ways to deliver on its mission and ensure relevance among funders. (KCI, 2012)

We find ourselves living in a time where information is available 24/7 and where there is a tendency on the part of those sharing that information to be fixated on the short term ups and downs of the markets, resulting in Canadians becoming more cautious when it comes to their finances. Keeping in mind that the recent recession taught us that charitable giving is strongly linked to the health of our personal finances, there is a strong sense that a tone of cautious optimism will accompany fundraising and philanthropy for the foreseeable future. (KCI, 2012) It will be crucial for charities to work even harder over the next while to ensure that relationships
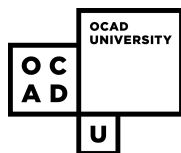
Chapter 06
CONCLUSIONS

with donors, specifically Millennials, are sound and that charities and nonprofits are able to continue to attract philanthropic support.

CHAPTER 06 - CONCLUSIONS

The organizations that make up Canada's charitable and nonprofit sectors are present in every neighbourhood and have widespread impact on every facet of our lives on a daily basis. They aspire to reflect our values as Canadians, and assist us in implementing our shared visions for a better nation. Ninety-three percent of the population consider charities of critical importance and 88 percent believe they have a direct effect on improving their own quality of life. Given this statistic, why are only 57% of Millennials currently engaged within the charitable and nonprofit sectors on a monthly basis? How can this number be increased to engage more?
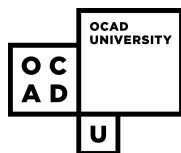
This research paper sought to analyze the importance in understanding the correlation of Millennials to charities and giving, with the aim of creating mechanisms for increased civic engagement. At the heart of that question, lies the goal creating a stronger sense of community and belonging woven across Canada. As a result, we looked at the contradictions and challenges that Millennials, charities, foundations, nonprofits and organizations face in terms of public perception and increasing engagement. We addressed the importance of community empowerment as it pertained to the role of donors and Millennials and addressed public opinion

about these organizations in Canada. We did this by focusing on the impact of Millennials as a critical generation in shaping the success of the charitable and nonprofit sectors in the future. The paper concluded by exploring strategies moving forward for both Millennials and the charitable and nonprofit sectors.

For the sake of continued growth and greater success in the charitable and nonprofit sectors in Canada, it's critical to learn how to Millennials, a demographic raising the stakes in the charitable and nonprofit sectors; asking for more accountability, transparency, and constantly pushing for legislative change in terms of how charities operate. It will be paramount for charities and nonprofits to capture this generation's passions, desires, and drive in order to draw them into their causes. The civic sector will need to work even harder over the next while to ensure that relationships with donors, specifically Millennials, are sound and that charities and nonprofits are able to continue to attract philanthropic support. Generating more widespread donor loyalty amongst Millennials should correspond with their desire to see a greater impact on a local scale. Charities and nonprofits should begin by creating more local initiatives that would resonate with Millennials' desire for opportunities to engage within their communities. As a society, we should strive to redefine what it means to be charitable by including any action performed for the greater good of another as charity. This is the true meaning of Charity Starts At Home. Charity can and should start with anyone – in any home, school, workplace, community, city, and country. At the end of the day, we are all capable alone, but more compelling together.
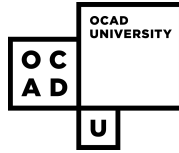
Personal Innovation Plan

How do we turn the insights gathered throughout this research study into actionable results in the charitable and nonprofit sectors? It's not only about Millennial involvement, it's about encouraging all sectors of society to take up this challenge for change. When we are successful in changing the definition of charity, we are involving more people in the process. How do we enact that kind of change? Personally, I would love to be involved with more organizations that are at the forefront of the current charitable scene. Also, finding a way to work with policy makers or people of influence within legislation, to give more charities freedom to evolve at the same rate that society. When we are successful in changing perspectives and understanding in these rapidly evolving concepts, charities and nonprofits will be able to galvanate more support and eventually become a force for change - instead of being forced to change.

Further Research

Presently, elements of charity should be better labelled to accurately encompass the multifaceted nature of what being charitable could mean in this day and age - with the potential to be optimized for greater community and Millennial reach. Communities must start by changing the definition, the focus, and the narrative by removing the negative stigma often associated with charity. As a society, we draw a line and classify people as charitable on one side and receivers on the other. In doing so, we are creating a 'status' society that values those who give, and curtails those who receive.
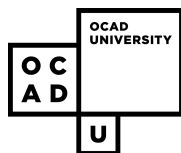
In many instances, society makes those who receive charity feel bad for taking it. Unpacking this further, imagine this: A long line of people standing in queue at a foodbank, waiting to receive charity in the form of food. How do they feel while they're waiting for their turn? Of course there is a certain level of gratitude felt for the opportunity at some additional help. Yet, they are in that situation because they have nowhere else to turn and no present means to generate a better circumstance.

No matter what positive spin we may put on it, in essence, those people feel disadvantaged and we as a society are partially to blame for that. This archaic way of thinking about charity is actually perpetuating that depreciated mentality - that as a receiver you're on the depraved side of the line and the rest society is flourishing on the other. Perhaps one day when that receiver is able to get out of that awful circumstance, 'turn their life around' - only then may they stand tall and 'give back,' because they've stepped over the line and assume the role of the giver.

This needs to change. People should feel free to be both givers and recipients without negative stigma being attached to either side. Charity should be free of the divisive lines that create those boundaries and keep people within them. As a society, we should strive to identify any action we may perform for the greater good of another as having the possibility to be charitable. Whether it's time, health, words, skills, resources, networks, and even smiles! Granting people the opportunity, even if they don't have the income or means and have only been on the receiving end of charity all their life - a chance to be givers. It's not about being charitable, it's about

establishing a society of givers with the perception that charity is entrenched within themselves, their households, and their communities.

"By clinging to what we currently have, we lose out on pleasures that we might have gained. In keeping what we possess, we diminish its long-term value to us. By always protecting ourselves against future uncertainties and misfortunes, we are formed in ways that make us more anxious and actually more vulnerable to future misfortunes." Smith and Davidson, 2014) In other words, if we fail to take care of each other, we're actually not properly taking care of ourselves. Generosity, or lack thereof, has been linked with well-being, shaping personal growth and purpose, health, and happiness.

As a result, by redefining the definition of charity, we are redefining the definition of a giver. By redefining the definition of a giver, we are redefining the definition of a receiver. That is the true inspiration behind the idea that Charity Starts At Home. Charity can start in any home, school, workplace, community, city, and country. It doesn't have to begin with the privileged, it should be intrinsically valued deep within everyone.

This is a long-held belief of mine, and through the research conducted for this paper, it's only been strengthened. I believe everyone, when given the right opportunities, has the ability to be a force for good. This type of thinking is very much in line with the Effective Altruism movement, in that effective altruism begins with a personal commitment to making a change in the world.
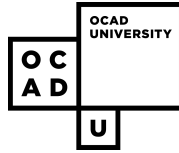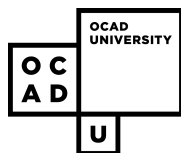
Beyond that, it's about remaining engaged in the long-term and focused on maximizing best

practices to make the best possible difference for social good.

(The Centre for Effective Altruism, 2015)

Taking this project further, perhaps at a phD level, I would love to explore the wider

implications of altruism on a community level in empowering individuals to take up the

challenge of charity.

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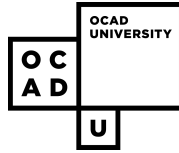
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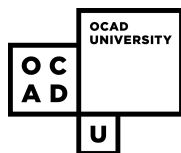
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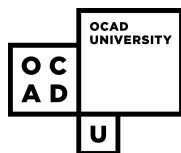http://www.ccsd.ca/images/research/UPP/PDF/PovertyReductionCanada_2008.pdf

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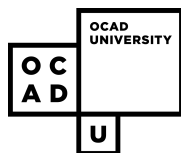http://www.cra-arc.gc.ca/E/pbg/tf/t3010/

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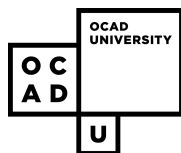http://kciphilanthropy.com/download_trends/1-KCI_English_2012_1A.pdf

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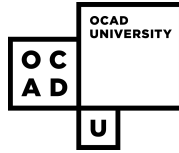Valle Painter, C. 2013. Sense of Belonging: Literature Review. Ottawa: Citizenship and Immigration Canada.

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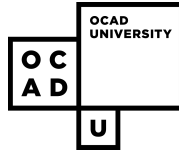
08

APPENDIX

APPENDIX

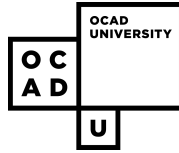### *Workshop Questions*

1. How do you define charity?

    a. Has this definition changed?

    b. If yes, how and why?

2. Name some charitable campaigns you thought were very successful.

    a. Why do you think they were successful?

    b. Did you participate?

        i. If yes, why?

        ii. If no, why not?

            1. What could they have done differently to get you to participate?

3. Name some charitable campaigns you thought weren't successful.

    a. What could they have done differently?

4. Approximately how much money have you donated in the last year?

    a. How many hours have you spent volunteering?

    b. How many initiatives/campaigns have you supported/shared on social media (including fb, twitter, and instagram)?

    c. Have you participated/supported any crowdfunding campaigns?

        i. If yes, how many?

5. What are some important considerations you think of before supporting a cause?

    a. What do you expect from charities/foundations you support in order for you to continue supporting them?

    b. How important is good storytelling? How do you define a good campaign story?

    c. How important is demonstrating impact/differences made?

6. Do you feel charities/foundations are being transparent enough about where/how donations and funds are being used?

    a. What are some ways they could do a better job of this?

7. Which method of donation do you typically use the most? (i.e in-person, in-store, street-vendors, online).

8. Which do you value more, supporting local community initiatives or global campaigns?

9. Think back to all the places you've been employed, what are some ways companies were engaging you in the realm of charity?

    a. What were they doing well?

    b. What could they have done better?

    c. What do you think is missing?

10. Does a company's CSR or participation in cause work motivate/influence you when applying for a job?

11. How do you feel about company-wide giving campaigns/initiatives?

    a. Do you feel pressured to give to certain organizations?

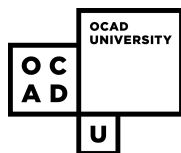   b. Would you prefer to have choice over the campaigns/initiatives you support at work?

12. Do you prefer volunteering with co-workers or using individual skills to help a cause?

    a. How do you feel about company-wide service days, where the company's entire workforce takes a day to volunteer in the community?

13. Does cause work, corporate responsibility, and company-wide service days affect how you perceive a company's culture?

14. Are there differences in how female employees want to volunteer compared to male employees?

15. What are some ways to facilitate better conversation/feedback between employees + employers, and donors + charities/foundations?

Online Survey

The final phase in methodology invited experts from the charitable and nonprofit sector to take an online survey that takes a deeper look at the correlation between the organizations they represent and their understanding of Millennials as a growing demographic, in importance and size.

Some of the questions they were asked included:

◆ Identify which generation they consider themselves to be a part of

◆ Whether their organization's efforts were focused more locally or globally

◆ If they believe Millennial's prefer to support causes rather than organizations

◆ How much emphasis does their organization place on engaging with Millennials

◆ What methods they're presently using to engage with Millennials, and plans to improve

◆ If the ways in which they engage with Millennials is different than other generations or the general public

◆ How important Millennial retention is to their organizations

◆ How their organizations strive to be transparent

◆ Some ways they can help Millennials asses the value of their charitable campaigns

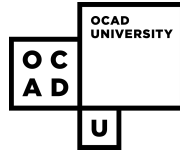◆ Ways in which they can facilitate better feedback between Millennials and their organizations

Some core observations collected from this survey include the following:

On a scale of 1 to 10, how important is it to your organization to engage with Millennials

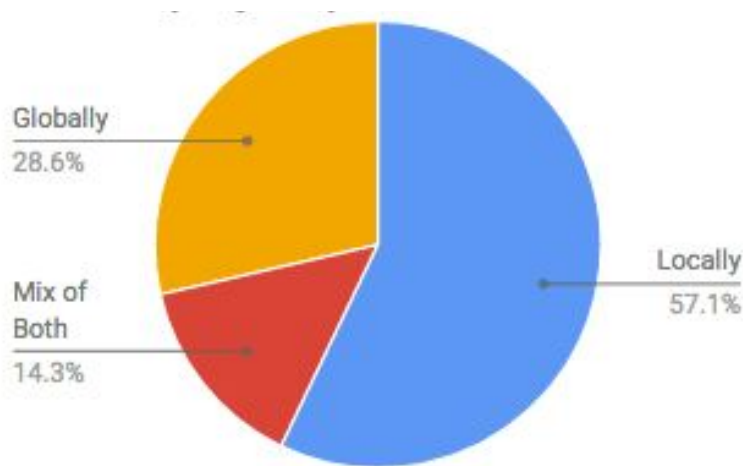On a scale of 1 to 10, how important is donor retention in your organization

On a scale of 1 to 10, how important is Millennial retention in your organization
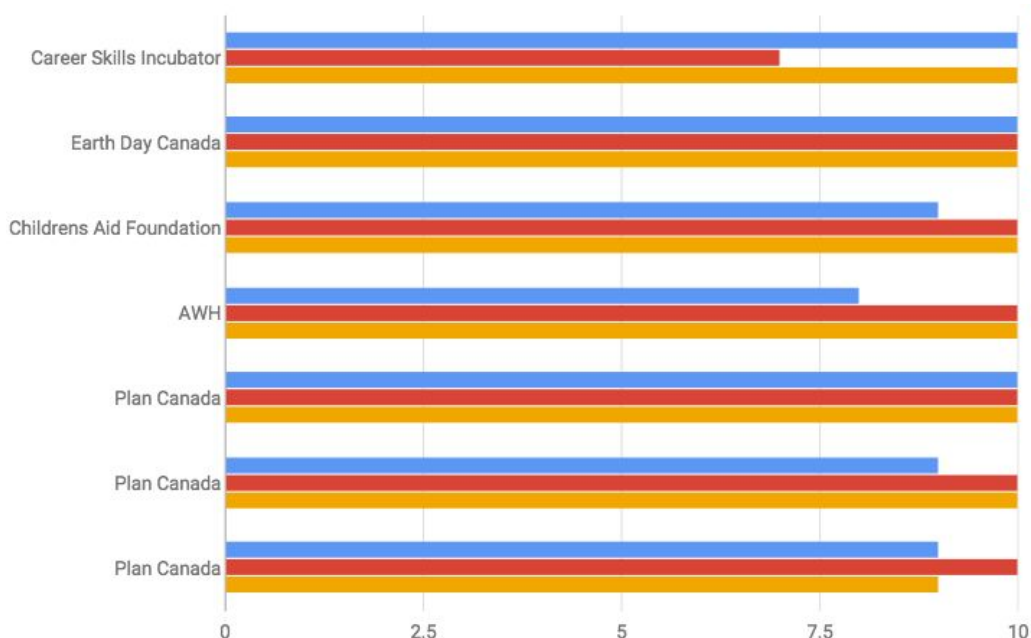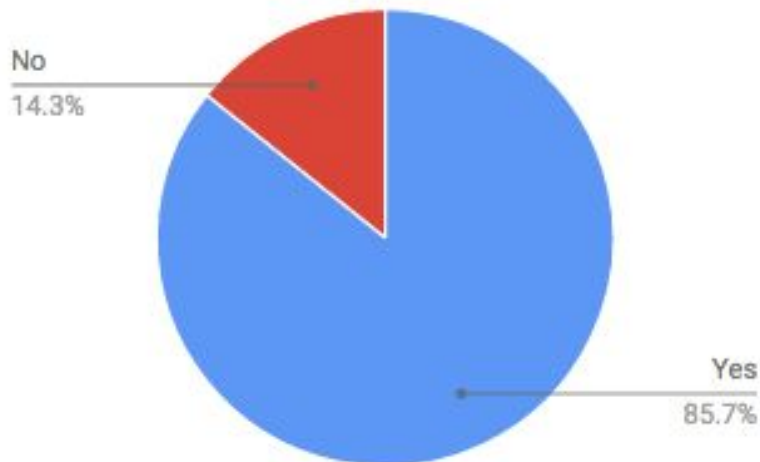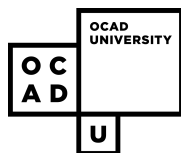
When asked whether their organization's efforts were focused more locally or globally, the

majority were local or a mix of both:

The majority agreed with the statement that Millennials are critical to charity efforts because

they are a large portion of Canada's population, workforce, and wealth.

Expert Interviews

As an additive to the initial literature review, reaching out to experts was helpful to orient myself in the field, as well as gaining access to their organization's internally valued resources in which large samples of Canadians were surveyed. These interviews also provided a critical shift in direction for the paper, shedding light on a lot of the positive data surrounding the charitable and nonprofit sector - painting a very different picture from a lot of the cynicism surrounding Millennials as a generation.

Experts interviewed included:

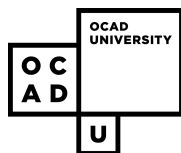Susan Vardon, Director of Millennial Strategy - *The United Way*

Lesa O'Brien, Director of Digital Engagement - *Plan Canada*

Catherine Pefhany, Campaign Director - *Earth Day Canada*

Susan Vardon, Director of Millennial Strategy at the United way, was the first person I interviewed, and the primary reason for the shift in research direction. I had initially sent her my research proposal and first draft of my literature review, and upon meeting her, she had a lot of constructive criticism for me. At this stage, that was exactly what I needed to narrow my scope. From my meeting with her, the following three insights could be discerned:

1. Canada is not at an all time low for civic engagement

Susan revealed that all too often it's the resources with the loudest voice which perpetuate the same pessimism without offering up a different side to the landscape. Susan suggested that I
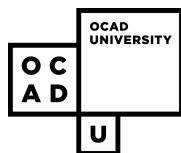
examine reports and surveys by Imagine Canada, KCI Ketchum Canada, the Canadian Council

on Social development, the Muttart Foundation, and '*Volunteering and Charitable Giving in*

Canada' by Martin Turcotte. She also gave me access to a lot of internal data from research the

United Way has conducted. These new resources offered a balanced view to my literature review,

grounded in cautious optimism and opportunity for growth.

2. Millennials are important, they just participate differently

The second core insight was that Millennials are a generation with rising importance, especially

looking five years out. A lot of the resources she handed me showed they diferent ways in which

Millennials operate with charities, the core take away being that they support causes - not

organizations. This means that storytelling is vital to captivating and engaging with this group.

Susan also expresses that other charities and nonprofits from the sector are presently

overlooking and not prioritizing Millennials as a demographic with clout. This realization comes

as a result of the United Way attending many national events each year, where the discussions

haven't yet embraced this collective. At the United Way, they are spending a great deal of time

trying to ensure that they can better capture this demographic - something Susan notes they've

struggled with in the past. She explained that they hold round tables and think tanks devoted to

studying this group.

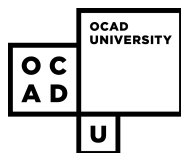3. How can we take up the challenge to engage millennials with opportunities that
   resonate?

These round tables and think tanks analyse where the United Way could improve on their reach.

Susan discloses that their primary way of attempting to attract more youth and Millennials to

their cause will be through schools and university campuses. She divulged many plans they have in the future, some included holding rallies and TED-style talks, while some of their more long-term plans centred around creating clubs/groups that recruit students to help organize events on a monthly basis so they always have a presence on campus. Susan noted that Millennials are a group with large networks, influence over friends and family, that want to be seen as important, have many skills that can be leveraged, and that increasingly want autonomy and responsibility. For these reasons, they are an excellent group to leverage for their leadership to widen the reach and spread the word for new causes and initiatives.
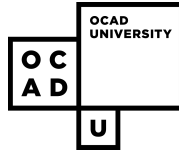
Lesa O'Brien, Director of Digital Engagement at Plan Canada, took on the role of my secondary advisor. Lesa aided in giving me a meaningful global perspective on Charity, grounded in the work they do here in Canada. Plan Canada is one of the largest charities in terms of their revenue, and half of their funding comes from grants while the other half comes from independent donations and corporate giving. The core takeaway from my interview with her was that as a global development charity with outreach abroad, they are currently having some difficulty obtaining new corporate sponsorships. This comes as a result of employees within organizations placing higher priority on giving back locally, which is very inline with the statistics around Millennials striving to 'do good' in their own communities. We also spent a lot of time chatting with how the different chapters Plan International engage Millennials, and where Canada falls on that list. In terms of social media engagement, Canada sits at 3rd place for Twitter behind Spain (2nd) and the Netherlands (1st), and 7th place for Facebook. Lesa

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mentioned this wasn't of great concern for them, because the way the analytics are calculated

don't take into account the total population of the country they are engaging. Therefore,

Canada's overall population is much larger, and they are actually engaging more people than

other countries. The only difference is that Spain and Netherlands, for example, are able to

reach more of their smaller populations - so technically it could be argued that they are doing a

better job at capturing more people. Lesa also gave me access to some great research, and

pointed me in the direction of Sector Monitor by Imagine Canada, to look at the industry as a

whole, and Blackbaud's research into specific methods for targeting Millennials.

Catherine Pefhany, Campaign Manager at Earth Day Canada, provided an excellent case study in

engaging youth and Millennials across Canada for their new campaign #EarthDayEveryDay.

Their campaign's focus was to obtain signatures for the 2015 Earth Day flag from citizens across

the nation, pledging to reduce their carbon emissions. At a time where it seemed like the federal

government wasn't placing enough emphasis on environmentalism and sustainable living, the

signatures on the flag were symbolic of Canadians commitment to fighting climate change.

Nationwide, Earth Day Canada held events for six months to rally support and have people sign

pieces of cloth that would eventually be combined together for the final flag. They also accepted

electronic signatures online, and had a great use of social media for those who couldn't be there

to participate in person. Throughout the six-month campaign, the support was overwhelming -

over one million signatures on the final flag. They also received wide support from government

officials and local celebrities, helping to validate and bring on more people to join the

movement. Catherine noted that Earth Day transformed a normally serious topic like reducing carbon emissions into a fun activity that increased participation while still maintaining the larger discussion. The events were used as an opportunity to educate, as well as championing more support for their cause and their organization.

These expert interviews also revealed disparities leading to critical insights for developing strategies moving forward; by looking at what they're currently doing, what could be optimized, and where there are potential gaps to fill. Their vast knowledge and understanding of the charitable and nonprofit sector certified the recommendations I put forward near the conclusion of this paper.