



CANADA
GIVES 

Canada Gives Annual Impact Report 2019





A message from the founder and CEO

Creating positive change from coast to coast

It goes without saying that the generosity of Canadian philanthropists is crucial at the best of times. It ensures that the not-for-profit sector can carry out its transformative work; that challenges are addressed and opportunities embraced; that communities are improved and lives are changed for the better.

This year at Canada Gives we celebrate both unprecedented growth and an opportunity to take our collective philanthropic efforts to another level. And in 2020, at a time of great adversity—when the services of not-for-profits are required more and new donations to charities are fewer—active grant-making foundations are crucial.

That's why we're dedicating our 2019 Annual Impact Report to the giving activities, and life-changing stories of our donors' activities, from across Canada. In sharing our performance data from last year, we'll explain the remarkable work being done in communities both at home



and abroad by the charities they support, and how Canadians enhanced their giving to create or expand a family foundation, which also helped our organization to the best year in its history. Those efforts have only been stepped up in the face of the COVID-19 crisis. You've responded generously to help the many charities that have been forced to curb their fundraising initiatives due to pandemic-related lockdowns.

We're proud of your work, of our growth as a facilitator of individual philanthropy and of our shared achievements—but together we have far more to do. All the better reason to continue pushing forward as we partner together to deliver hope across our country and beyond.

J. Denise Castonguay,
Founder and CEO Canada Gives





Your generosity, by the numbers

If there are boundaries to your kindness, Canada's many deserving non-profits have yet to encounter them.

We're proud to say that our donors are a very generous lot. Canada Gives Foundation accounts typically disburse more to charities as a percentage of charitable assets than most other DAF organizations, as well as many well-established private foundations. This trend not only carried through to the pandemic, but accelerated dramatically throughout the first quarter of this year.

Your grants continue to make our communities more functional, equitable, safer, livable and enjoyable. The simple act of disbursing funds from your Canada Gives Foundation account can spell the difference between the success or failure of an essential charitable program or organization.

The entire team here at Canada Gives is driven to help you grow as a philanthropist. We take inspiration from your passion for creating lasting change across communities, while drawing on your energy as we continue to find exciting new ways to innovate as an organization. Whether that's investing in dynamic new digital technologies or bringing on new talent to help us grow, know that we're as committed as ever to providing a tailored service that caters to your every philanthropic need.



A Year-Over-Year Snapshot of Our Growth in 2019

	2018	2019
Total charitable assets in DAF accounts	\$39.3 MILLION	\$96.1 MILLION
Total number of foundation accounts (DAFs)	128	157
New receipted donations	\$12.8 MILLION	\$58.4 MILLION (AN INCREASE OF 316%)





How Canada Gives creates lasting change

Our customized Canada Gives Foundation accounts (also known as Donor Advised Funds, or DAFs) and proprietary Foundation Administration Platform empowers philanthropists and their families, helping them fund their preferred charities however and whenever they want with the help of their trusted advisors.

A Canada Gives Foundation account offers the same funding choices and executive privileges as a private foundation, but with lower administrative costs and far greater flexibility. This simplified, flexible structure offers philanthropists an effective tool to maximize their legacy and create a lasting impact well into the future. And if you want to learn how the not-for-profit sector works with foundations, and dig deeper to understand how to make a bigger impact with your charitable dollars, Canada Gives has many more services at your disposal. Best of all, setting up a foundation with Canada Gives takes less than a day, compared with up to a year when establishing a private foundation. You select the registered charities to support, as well as how much each should receive and your preferred timing, and we manage the disbursements.

Put simply, we take the burden out of setting up and operating a foundation by providing a boutique experience, which includes full administrative support and seamless reporting services. While we ensure all decisions adhere to Canada Revenue Agency policies, choosing a donor advised fund at Canada Gives as your foundation also ensures complete financial privacy and mitigates personal legal and tax risk.

Here’s how we can help build your philanthropic legacy:



Foundation mission statement
Development and implementation



Donor connection
Provides opportunity for like-minded donors to collaborate



Advisor relations and support



Customized in-depth research
Comparison analysis and due diligence on more than 86,000 charities across Canada



Website development
For those wishing to publicly promote their foundations and attract donations/grant applications



Profile development and management of grant applications
For those wishing to attract funding requests from the non-profit sector



Fundraising support
Including P2P platforms, customized donation forms and ongoing campaign reporting





Coast-to-Coast stories of charitable success

From a year of unprecedented growth as an organization in 2019, to one of unprecedented need across the charitable sector in 2020, we've seen Canadian philanthropists rally in the face of a transformative crisis. Here are just a handful of the ways that Canada Gives donor clients have networked, shared ideas and opportunities across our community—and found creative new ways to make a difference in the year gone by:

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BRITISH COLUMBIA

A business-minded approach to giving back

As we've noted in recent blogs, an increasing number of wealthy individuals are choosing Canada Gives Foundation accounts as they look to become more engaged and structured in their giving. But these dedicated philanthropists—many of whom come from executive or entrepreneurial backgrounds—want to achieve the same impact in their charitable work as they did (or do) in their professional lives. That was the case with a successful B.C.-based donor.

His initial \$2 million contribution could have easily gone to a private foundation rather than a Donor Advised Fund. But instead, he chose Canada Gives after learning about our process and high-touch service model. He was particularly interested in our transparency, the way we manage tax reporting and how we help donors mitigate legal risk, while also protecting privacy by fielding and handling grant requests on their behalf. His wife noticed and appreciated our professional reporting processes.

The support the donor has received from Canada Gives allows he and his wife to focus on selecting and actively engaging with a range of charities, while maintaining full control over their giving. They sit on several boards and are deeply committed to these causes—so much so that they plan to volunteer more of their time in the years ahead as they look to make an even more pronounced, lasting impact with their wealth





ALBERTA

An Alberta-based donor takes steps to amplify his philanthropy

For many philanthropists, the charitable journey begins with a single, selfless goal in mind: using their additional resources to improve the lives of others. For an Alberta family, achieving their full potential as philanthropists meant taking their giving a step (or three) further than simply writing cheques to local charities. After accumulating wealth during the Alberta oil boom, the family reached out to Canada

Gives for guidance in developing a strategy for their charitable foundation. Working closely with our client services team, they began to better understand the not-for-profit sector and its many potential funding options. Through the exploration of personal and family values, they defined a mission statement and created a strategic roadmap that would allow for ongoing and impactful giving to support their favourite causes. Built in was the flexibility to respond quickly to national and international calls for assistance, which was of great importance to the family, as well. The process began by completing a customized questionnaire designed to explore funding interests, how much they wanted to give, across which categories,

whether those donations would be local or national, as well as a range of other criteria. The intention was to create a recurring, long-term plan that would require little effort to implement each year, while satisfying the annual minimum disbursement quota for charitable foundations in Canada—which can feel like a burden for those with large foundations. In working with the Canada Gives client service team, the donors were able to build more meaningful relationships with their recipient charities, while being assured their choices had been carefully vetted by their own team of professionals. By participating in this proactive planning exercise, the donors were able to minimize their own time and effort behind the scenes, while maximizing their giving to fund ongoing and ever-larger projects that represented their own core values and interests as a family.



ONTARIO

Delivering international aid to under-serviced areas

The hurricane that tore through the Bahamas on the Labour Day weekend last year left a devastating trail of destruction in its wake. Thousands of Bahamians were left homeless, without food or water as local officials struggled to provide everything from medical and financial assistance, to basic food and water relief. That's when 'Chuck,' an Ontario-based Canada Gives Foundation account holder who has a vacation home in the Bahamas, took action. Chuck sat on the board of a registered U.S. charity that supports causes on the smaller Bahamas islands. That U.S. charity had provided relief funding after previous natural disasters in the area, but faced a major test after Hurricane Dorian left the less-populated North Abaco island and surrounding communities in ruins.

Chuck contacted Canada Gives to see if we could help. He knew that his Canadian friends and neighbours couldn't donate to the U.S. charity and receive a tax receipt; he also understood that international charities offering immediate aid focused on the more populated areas of the Bahamas. We helped Chuck launch an online fundraising platform within two days to accept donations from Canadian donors and other foundations based in Canada. He managed to raise more than \$200,000 in just two weeks, while all donations were tax-receipted by Canada Gives.

Our Global Projects Initiative team worked with Chuck to identify projects to fund through his platform. We're now working with the U.S. charity (under CRA guidelines) to disburse that money to meet local needs and provide disaster relief solutions in the area where he wanted to provide help. While COVID-19 has slowed our efforts, we're working diligently to help Chuck make a lasting difference.

An advisor who walks the giving walk

For many donors, the path to becoming an active philanthropist is paved by a trusted advisor. That could be anyone from their accountant or lawyer to a wealth manager—many of whom will connect wealthy clients to Canada Gives to help manage their giving. For 'John,' a financial advisor based in Owen Sound, helping clients realize their philanthropic potential has become a major part of his practice, not to mention a personal passion.

John has not only helped several of his clients open Foundation accounts with Canada Gives, but maintains his own, as well. It would be an understatement to say that he promotes philanthropy at every level. For years, he and his family have volunteered at various local charities, have run a successful annual golf tournament that's given away hundreds of thousands of dollars to local causes, helped fund the construction of a local hospice and provided invaluable operational expertise vital to the smooth running of many of the charities they support. His criteria for supporting a cause is less about bottom-line performance, instead focusing largely on the character of the people running it—and their commitment to making a meaningful impact.

And in a creative charitable twist, he eschews typical client gifts around the holidays. Instead, John makes donations to individual charities that are chosen by each of his clients, and on their behalf, funded from his Canada Gives Foundation account. It's a novel way for an advisor to not only help a client be philanthropic, but to lead by example with his generosity.



QUEBEC

Helping to realize an arts patron's generous legacy

For one Montreal-based donor, the arts were not only an interest, but a life-time passion. He'd long been an active supporter of smaller theatre and various arts groups in Quebec, where his funding had a significant impact. When he passed away, the donor left a charitable bequest in his will that designated his financial advisor as the executor. To complicate matters, the donor's charitable bequest stated that he wanted to support the arts, but didn't designate specific organizations as gift recipients. The advisor needed assistance to ensure that his executorial obligations were met under provincial law.

Because the executor lacked experience in this very niche part of the not-for-profit sector, and struggled to select appropriate charities, he was concerned about potential legal liability if he mismanaged the disbursement of funds from the estate. That's when he contacted Canada Gives to help relieve the considerable administrative burden and to identify and vet various organizations that might be candidates for support. Our team was able to provide the executor/advisor with peace of mind that the task would be managed in a professional manner. That included fulfilling the Canada Revenue Agency's annual reporting requirements, while handling a wide range of administrative duties.

Ten years later, most of the charitable funds in the Foundation have been disbursed to charities; we continue to work with the executor as he spends down the remainder of the bequest, while helping to grow the donor's legacy more than a decade after his passing. It's one example of the comprehensive and customized service that we can provide to executors as they work to manage charitable bequests and realize their clients' long-term giving goals.



MARITIMES

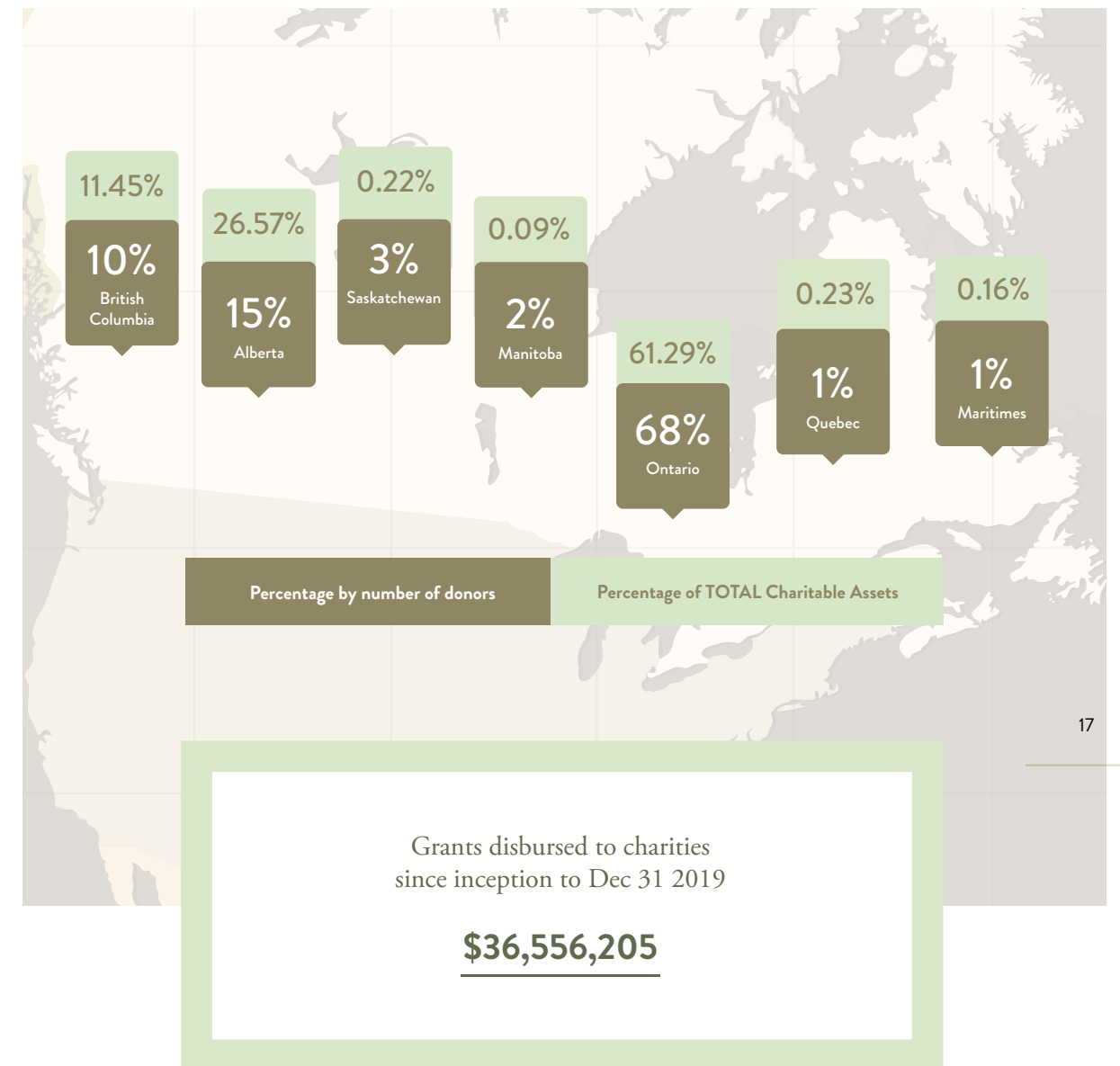
Using philanthropy to honour lives lost

The string of shootings and subsequent deaths of 23 people in Nova Scotia last April left indelible scars across several sleepy communities. Not only were locals struggling to manage in the face of COVID-19 lockdowns and the ensuing economic disruption, but the wanton violence—virtually unheard of in these towns—left neighbours in shock and searching for answers. While one Canada Gives donor could offer little solace to his fellow grieving Maritimers, he was determined to make sure that those who perished would not be forgotten.

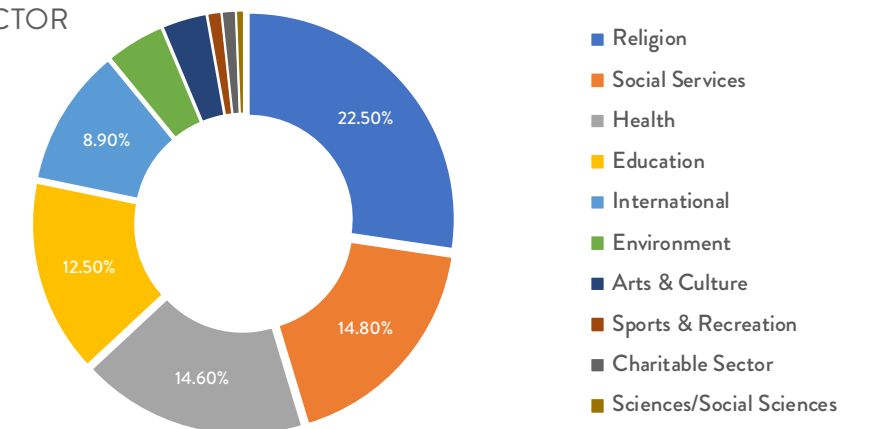
So, he set out to work with the Municipality of the County of Cumberland, Nova Scotia, to build a memorial to the Wentworth-area victims of the shooting. Up to that point, the Canada Gives Foundation account holder had provided funding for university scholarships, churches and a range of other causes across the Maritimes. Of course, this is a very different type of giving. Because the memorial was not a project managed by a registered charity, the funding from the foundation account had to be sent to another type of qualified donee in order to meet Canada Revenue Agency requirements. Our team helped the donor navigate the logistics of making and managing a gift of this sort. The work to build the memorial is ongoing, but the effort highlights the range of options available to philanthropists in Canada.

Many don't realize that it is possible to donate to, and receive a tax receipt from, any organization deemed a 'qualified donee' by the CRA as outlined on the agency's Charities Directorate. The list is long and varied, but underscores the fact that with guidance and creativity, the giving opportunities in Canada are vast.

DONOR AND DAF ASSET ANALYSIS BY PROVINCE (DEC. 31, 2019)



GRANTS PER SECTOR





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CONTACT CANADA GIVES

Let's work together!

Contact us directly or through your professional advisor, and we'll work to customize an individual or corporate Foundation account that achieves your specific goals.



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