

The background features a blue gradient with a network of white lines and arrows. Various icons are scattered throughout, including a lightbulb, a person, a globe, a megaphone, a pencil, a tablet displaying a dashboard, a gear, a wrench, a tie, a magnifying glass, and a speech bubble. At the bottom, there are silhouettes of five people's heads, each containing several gears of different colors (white, orange, blue).

CCEC July 2021 World Café Notes

Discussions:

1. **Creating better funding applications**
 2. **Including or excluding non-profits which are not charities**
 3. **Paying community organizations for volunteering opportunities and speaking engagements**
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Table 1: Creating better funding applications

- **How can we improve our applications and processes to both meet our business needs and reduce barriers for charities?**
- **How can we embrace equity to be more inclusive?**
- **How can we work with charities to increase the impact of our funding?**

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- **Give Multi-Year, Unrestricted Funding**
 - **Get to know Prospective Grantees, saving nonprofits time in the early stages**
 - **Simplify & Streamline Paperwork**
 - **Be Transparent & Responsive**
 - **Solicit & Act on Feedback**
 - **Offer Support Beyond the Check**

More information at:

www.trustbasedphilanthropy.org



Table 1: Discussion notes

Overall: There's an obvious skills gap in knowing how to maximize the grant application process. It's inherently inequitable and system change is required to address its limitations.

Applications Lack Specificity

- Organizations want to tailor applications but it's difficult if there is lack of clarity and transparency for what the funder is looking for
- Company's should simplify the level of information needed from charities

Rethinking the Dynamic

- More funders are approaching charities directly– the days of blanket applications seem to be over
- Applications can't be a One-Size-Fits-All
- Existing partners shouldn't have to fill out the same application as new organizations

Develop different types of applications: new vs returning/restricted vs unrestricted

Revisiting Reporting

- Make reports available year-round to better manage and track impact
- Focus on simple instructions with clear deliverables
- Standardize across the sector; partnerships don't happen in isolation

Ensure Fairness in Application Requirements

- Avoid possible double standards between funder and grantee



Table 2: Including or excluding non-profits in corporate community engagement programs due to their charitable status

1- What is its corporate status?

2- What is its tax status?

Unincorporated Association

Non-profit Corporation

Registered Charity

Non-profit Organization



- Could have any purpose except profit
- No separate legal existence from individual members. Contracts and liability are with individuals
- Does not need to register with the government or make annual filings
- Internal governance determined by common law and constitution of group
- Info not necessarily available online

- Could have any purpose except profit
- The organization is considered its own legal "person". Contracts and liability are with organization
- Needs to register with the government and make annual filings
- Internal governance determined by statute and bylaws of group
- Limited info available through corporate registry

- Tax exempt
- Can issue tax receipts
- Constituted and operates for exclusively charitable purposes (relief of poverty, advancement of education, advancement of religion, or other purposes beneficial to the community in a way the law regards as charitable)
- Must register with the CRA and face sanctions if violate Income Tax Act
- Info available through CRA database

- Tax exempt
- Cannot Issue tax receipts
- Can operate for social welfare, civic improvement, pleasure, sport, recreation, or any other purpose except profit and cannot operate exclusively for charitable purposes
- Does not need to register with the CRA and will be taxed like a business if found to operate for profit
- Info not necessarily available online



Myth 1
Only registered charities are responsible with donations

- Fact: Non-profits cannot use profits gained to benefit members or employees and their main goal is to support the organizations mission

Myth 2
Non-profits and charities are the same thing

- Fact: While not all non-profits are charities, all charities are non-profits, and both are important in building better communities

Myth 3
Unincorporated Associations are not as impactful as charities

- Fact: They play a pivotal role in society, building and strengthening marginalized communities, enabling civic engagement and advocating and supporting the most pressing social issues facing our communities

Myth 4
Donating is the best way to give back to community

- Fact: Many non-profit and unincorporated associations rely heavily on volunteers. Assisting with pro-bono skills-based projects can have a huge impact on their longevity and overall success

Myth 5
Employees can only give to registered charity's through Benevity and other giving platforms

- Fact:* If the organization is not available in the database, employees can nominate the organization they would like to donate too (CRA # or articles of incorporation or society act or letters patent required)



Table 2: Discussion notes

- Platforms are primarily designed to work with registered charities, but include the ability to nominate causes for inclusion
- CRA oversight and tax receipts are two of the primary benefits of donating to registered charities
- Non-profits don't seek registered status because it requires exclusive focus on charitable activities, registration takes significant time and effort.
- Many employees volunteer with grassroots associations that meet local community needs - and provide opportunities for engagement
- Registered charities are approximately 10-20% of organizations
- About half of all registered charities are religious in nature
- Funding to non-profits tends to be smaller, lower risk
- Important to share the distinctions between non-profits and registered charities
- Liability insurance is available for both CRA and non-profits



Table 3: Paying community organizations for volunteering opportunities and speaking engagements

To Consider:

- Cost: including supplies and staff time (pre-and post event)
- Investment for the non-profit: many community organizations consider the engagement an opportunity to further the relationship and will therefore not ask for reimbursement
- Power Dynamics: for some, even if you offer, they will not accept.
- Principle of Reciprocity: give and take

Ways Volunteer Canada suggests companies approach reimbursing NFPs for their costs:

- Initiate the conversation
 - Suggestion: offer at \$200-250/person hour + supplies, parking and other hard costs
- Budget for it; promote budget/guidelines/education to employees
- Make explicitly part of funding arrangements (don't spring it on them later)
- If volunteering opportunities are a question in funding applications, make it clear that the response does not affect funding (if this is so, if not, make that clear too)
- It is not a donation; it is a reimbursement for their activities to involve your stakeholders.



Table 3: Discussion notes

Build cost into project planning

Make this a part of company guidelines and explicitly part of the funding arrangement prior to the agreement. Budget for it and educate employees about the importance of reimbursement for non-profit partners.

Be aware of power dynamics

As many community organizations consider the engagement an opportunity to deepen their stakeholder connection, they may not be comfortable asking for reimbursement in fear it will jeopardize the relationship. Proactively offer the reimbursement as part of the agreement and encourage the principle of reciprocity. Encourage charities to keep to what they need and say no to company's if they cannot accommodate the team building opportunity.

Know the difference

It is not a donation rather a reimbursement for their activities to involve your stakeholders and this should be made clear from the onset.