

# Private Giving Foundation

Celebrates 15 Year Anniversary

Fall 2019



## Happy 15 year anniversary to PGF

In October 2004, Private Giving Foundation (PGF) was launched as a simple, tax-effective way to leave a legacy of giving as an alternative to establishing a private foundation. TD is proud of its leadership role in Canada to be the first financial institution in Canada to launch a donor-advised fund program.

With just over 1200 donor-advised funds and growing, PGF has distributed \$260 million to a wide variety of charitable organizations since inception.

On behalf of TD and the Board of Directors of PGF, we would like to sincerely thank all of our donors for their generosity and for including PGF as part of their financial and estate plans. Not only are donors contributing to PGF during their lifetime, many are choosing to enhance their legacy by including a bequest in their will, and designating PGF as beneficiary of registered plans and life insurance policies.

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## Focus your giving for impact by:

**Gwen Joy** | Manager, Citizenship Impact Measurement & Evaluation | Global Corporate Citizenship | TD Bank Group

With over 86,000 organizations registered as charities with the CRA, philanthropists can struggle to design a charitable giving plan that they know will make a measurable difference to the causes they care about. Here are four key steps that can help donors focus their giving for impact:

### **Choose an impact area.**

Focus is the key to achieving impact. It's hard to change something that you can't define. It may help to start with a cause that you are knowledgeable and passionate about. Take your time, do your homework, and locate a unique need that you can explain to friends and family in three sentences or less. Once you are clear on the change you'd like to see, it's much easier to find the organizations that are actively working to realize it.

### **Research.**

Create a long list of the organizations that work to address your impact area. Pull from resources offered by organizations like Imagine Canada, Philanthropic Foundations Canada, Canada Helps, as well as your own knowledge of the issue. Then look at an organization's mission and vision. Are they in the business of addressing

your impact area? Do they describe it as a first priority, or is it a secondary benefit?

### **Review the evidence.**

Look for evidence of impact. How do you know an organization is making a difference on the issue you care about? Have a look at their annual reports. You should easily find evidence of their outputs (what the organization did) but also of the outcomes of that activity (the direct effects of an organization's work) along with a rationale as to how they contribute to a longer-term vision for change. Have they chosen indicators to measure progress against, year-over-year? Do those indicators link directly to your impact area? Remember, qualitative evidence can also be valid and important. Critically, does an organization regularly ask for feedback from the people or communities they aim to benefit? How specifically do these insights inform their program development? Beyond the numbers, organizations that practice meaningful engagement with their stakeholders are often poised to make the deepest impact.

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"Look for evidence of impact."

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## Case study

Through The Ready Commitment, TD aims to improve access to tools and programs to help people live their lives with greater financial confidence. One of the ways we do this is by helping set children up earlier for success by investing in opportunities to improve reading and math, which are critical skills to succeed in school and life.

That is why we support JUMP Math, an award-winning non-profit that applies evidence-based curricula with the aim of sparking an understanding and a love of math in children. The JUMP Math program prioritizes improving math abilities, with a focus on children from high-need communities where math achievement is below national

standards. JUMP tracks a blend of output and outcome measures. Their output measures include the number of children participating in the program and the number of partner schools. To measure the outcomes of their program, JUMP regularly applies a pre-and post-program testing protocol that assesses the growth in math

achievement for participating students in comparison to a benchmark. These results are then aggregated and tracked year-over-year. By collecting detailed evidence of their impact, JUMP can demonstrate that their program is effective in increasing math skills and they can build their understanding of how they can be even more impactful.

## Interview

**Jo-Anne Ryan, Executive Director, Private Giving Foundation**

**Interviews** Christine Magee, Chair of the Advisory Committee for the Talent Fund

### What is the TALENTFUND? and why is it so important?

**CM:** I first learned about the Talent Fund at an event several years ago and was inspired by its dedication to the development of emerging Canadian filmmakers.

The Talent Fund is vital because it supports the production of first feature films and narrative web series from across the country through Telefilm Canada's Talent to Watch Program (we have supported close to 150 projects so far). The program focuses on creators from indigenous and official-language minority communities, and also has been especially successful in its support of women. Having met several of the program's alumni, I've witnessed firsthand how it launches the careers of emerging professionals who have contributed their stories to Canada's cultural landscape, and whose films have won audiences, critics, and prizes the world over.

As the new Chair of the Advisory Committee for the Talent Fund, I look forward to continuing what Hartley T. Richardson, former Chair, has so passionately advocated and started since its inception.

### Can you provide me an example of a rising star who received support from TALENTFUND?

**CM:** I've had the pleasure of meeting several recipients – and was just at TIFF with my daughter to watch a premiere of a Talent to Watch project (to a sold-out audience) – it's just too hard to pick! One name that come up frequently when talking about successes is **Jasmin Mozaffari**. She is a rising star and has made a name for herself in a short period of time. If you haven't heard of her yet, we're certain you will soon.

Films make a unique contribution to the cultural fabric of our nation. It's a privilege to advocate for Canada's talented emerging creators and invest in their future.

**Christine Magee**



Jasmin gained global attention since premiering her directorial debut FIRECRACKERS at TIFF last year.

Variety also proclaimed her as a “major talent” and her film was named a New York Times Critic’s Pick this past summer.

The film received the 2019 Canadian Screen Awards for Best Achievement in Direction and Editing, which are Canada's version of the Academy Awards. Variety also proclaimed her as a “major talent” and her film was named a New York Times Critic's Pick this past summer. In September, I attended Telefilm's annual Birk's Diamond Tribute to the Year's Women in Film event, where Jasmin was among the honourees. I take great pride in seeing young creators embark on journey that will propel their careers and onto their next projects. We can't wait to see what she does next.

### Where do you go if you are interested in learning more about TALENTFUND?

**CM:** The best place to start learning more about the Talent Fund, as well as the filmmakers it has supported, is to visit the website: [www.thetalentfund.ca](http://www.thetalentfund.ca)

If you have any questions regarding the Talent Fund, or would like to get involved, I welcome you to get in touch with Talent Fund Director, E.J. Alon at [ej.alon@telefilm.ca](mailto:ej.alon@telefilm.ca).

# Thank you Sam and Joanna and welcome Tom and Denny



As part of board succession planning, **Sam Hirsch** and **Joanna Mazin** have completed their board terms. We would like to extend our thanks and gratitude for serving on the Private Giving Foundation Board. We would like to offer a warm welcome to **Tom Kingissepp** and **Denny Young** who have recently joined the Board. We look forward to working with you.

## Special Senate Committee on the Charitable Sector releases report

In June 2019, the Special Senate Committee on the Charitable Sector has released its report. The report is based on 24 public hearings since January 2018 and includes input from 160 witnesses and 695 responses to an e-consultation questionnaire. The witnesses and participants repeatedly shared evidence under four general topics: the people working and volunteering in the sector; funding for the sector; the rules governing the sector; and the need for a "home" within the federal government for the sector. There are 42 recommendations to better support the non-profit sector in Canada. We look forward to seeing how these recommendations unfold to benefit the charities, donors, and volunteers.

## With Gratitude

On behalf the PGF board of directors, we wish to thank you for donating to the PGF and creating a legacy of giving to support the causes that matter to you. Incorporating philanthropy in your overall financial and estate plan is a great way to do just that. As December 31 is fast approaching, please take the time to do year-end tax planning and remember that charitable giving is a great way to reduce taxes and re-direct them to causes that are important to you. For information on various tax planning charitable giving strategies, please contact your TD advisor or [joanne.ryan@td.com](mailto:joanne.ryan@td.com)



We welcome your questions and comments. Please direct them to [joanne.ryan@td.com](mailto:joanne.ryan@td.com) or call **416-308-6735**.

**Jo-Anne Ryan**, Vice-President, Philanthropy, Wealth Advisory Services,  
TD Wealth & Executive Director, Private Giving Foundation

[www.tdwealth.ca/privategiving](http://www.tdwealth.ca/privategiving) | **twitter: @charityjune30**



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