



Private Giving Foundation

A simple, effective way to support the causes that matter to you.

FALL 2020



Nicole Nakoneshny

Jo-Anne Ryan, Executive Director, Private Giving Foundation (PGF) interviews Nicole Nakoneshny, Partner, KCI Ketchum Canada and Chair, PGF, on the impact of the pandemic on the charitable sector

Jo-Anne: In your opinion, what has been the impact of the pandemic to the charitable sector?

Nicole: The pandemic is having a profound effect on the charitable sector and every charity is feeling its effects in some way. Some are feeling an increased demand for their services, some are experiencing challenges generating revenue and some, unfortunately, are finding themselves in both categories. And like every other type of organization, charities have had to shift strategy, both fundraising and mission delivery, to respond to the realities of physical distancing and safety concerns. At this stage of the pandemic, most charities are now in

a longer-term rethinking mode, seeking to ensure they can sustain themselves over the coming years and months. As a result of all this change and adaptation, donor support is honestly needed now more than ever.

But, as is always the case in times of challenge, there is also much opportunity. Probably one of the most significant is that the pandemic has demonstrated how critical charities are to Canadians' health and well-being and has generated an appreciation of the importance of having a very strong social safety net, whether in healthcare, education, or social services. And, as communities continue to emerge from the pandemic, I believe we will also be reminded how much we need the other 'essential' elements of our lives ...the ones that are filled by sports, recreation, and arts and culture.

Jo-Anne: Which types of charities have been the hardest hit?

Nicole: It's actually hard to pick ones that have been hardest hit as virtually every organization in every sector, whether it be healthcare, education, the arts or social services, have been affected by the pandemic. But while every charity is feeling some sort of effect, I would say those that rely on the 'coming together' of larger groups of people are one group that have been significantly hit the hardest. I'm thinking in particular of arts and culture organizations that rely on audiences for earned revenue, something that is a critical part of their revenue generation activities. In addition, charities that historically rely heavily on event fundraising are also feeling significant downward pressure on their income generating capabilities.

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From a demand point of view, in addition to front line healthcare organizations, the other group seeing a significant uptick are social and community service organizations - those dealing with populations most impacted by the pandemic as well as those dealing with some of its longer-term implications in issues like mental health and poverty.

Jo-Anne : What lessons have charities learned through COVID-19 and what do they need to do differently going forward?

Nicole: There are three things I would point to. The first is building solid, deep and long-lasting relationships with donors, and particularly individual donors. Those that have relied on transactional, event-based fundraising will likely be challenged for some time given the psychological fallout from physical distancing measures. What may also change is who has the capacity to give as we continue to deal with the economic consequences of the pandemic, including high unemployment rates. As such, charities should focus resources and attention on individual giving programs that build personal, ever-deepening relationships, particularly with donors who have greater giving capacity.

The second is investing in the digital space. Given the challenges that physical distancing has created for many charities, creating greater digital capacity to ensure it is adequate likely feels obvious. Organizations with existing digital capacity and facility were able to respond much more quickly to the changes required when physical distancing measures were enacted. But, even if the pandemic were to end tomorrow and we were able to connect in person, growing digital acumen and infrastructure is still an absolute necessity.

And the third is creating a degree of diversification to be certain the charity isn't overly reliant on one revenue stream. And that they have a good mix of fundraising programs, including ones focused on acquiring new donors, ones focused on renewing gifts from donors, and ones focused on encouraging groups of high potential donors to grow their giving.

Jo-Anne : What should donors be thinking about and perhaps be doing differently now?

Nicole: The pandemic has increased awareness of the need for infrastructure and unrestricted support of charities and I'm hoping that donors will have greater openness to supporting a case for creating strong and healthy operations than they have historically shown.

Because the situation continues to be somewhat fluid and shifting, charities ideally need flexibility in their revenues to be able to continue to respond and adapt. So, the greater the degree of unrestricted support they can receive over the coming months and years, the better able they will be to continue to survive and ultimately thrive. I'm hoping that going forward, there will be an increased appetite for donors to allocate some of their giving to ensuring the long-term health and stability of the organizations they are supporting.

Jo-Anne: What criteria should donors be looking at when deciding to support a charity during these challenging times?

Nicole: Donors should support organizations they feel strongly about and that help to address and advance areas of interest and priority to them. And as always, undertake some due diligence to ensure they are

making wise investments with their charitable giving. However, I would also encourage donors, at this time in particular, to think about broadening their giving criteria, both in terms of the kinds of organizations as well as the kind of support they give them. Charities need more support than ever and will be looking to our very generous Canadian donor community to help weather the pandemic and rebuild and recover. And I suspect that not only will widened donor horizons be extremely beneficial to the charitable sector, it may lead to some very fulfilling experiences for donors as well.

Jo-Anne: And finally, I want to end with a personal question. What do you miss most during lockdown?

Nicole: To be honest, as boring and mundane as it sounds, the biggest thing I missed during the period of intense lockdown was a regular routine, both daily and weekly. □



... generosity is thriving in multicultural communities across Canada.

The generosity of newcomers to Canada and second-generation Canadians on charities

Newcomers to Canada and second-generation Canadians are highly motivated to support charitable causes, according to a new survey from Imagine Canada, Ethnicity Matters and a coalition of charities and nonprofits.

The 2020 study, titled the **Multicultural and Newcomer Charitable Giving Study**, is one of the first in Canada to explore the influence of ethnicity on supporting charities. The study's conclusion: the communities surveyed – South Asian, Chinese, Filipino, Black (Afro-Caribbean/African), Arab and Iranian – share a strong willingness to embrace community service.

The study shows that newcomers to Canada and second-generation citizens are driven to give and volunteer out of a sense of duty to advance the well-being of their communities and Canadian society in general. Empathy for those in need is deeply rooted in strong family and religious values. Three quarters of those surveyed say

giving is the right thing to do, while seven-in-ten believe it is very important to pass on these values by teaching their children about the importance of charitable giving.

"The good news emerging from this research is that generosity is thriving in multicultural communities across Canada", says Bruce MacDonald, President & CEO of Imagine Canada. "The experience of settling in a new country has given newcomers and second-generation Canadians a highly compassionate perspective on taking care of others. Charities and nonprofits are on the frontline of providing services when people arrive in this country, so their first experiences reflect a caring society. These groups are highly aware of the goodness created when people help each other." □

To view the full report, please go to:
<https://imaginecanada.ca>



KOTHARI FAMILY FOUNDATION

I firmly believe that all of humanity is one big family wherein everyone is connected, and I owe my achievements to the obvious, as well as to the not so visible, contributions of other members of this family. As a part of this family, it is not possible for me to be truly happy as long as other members are suffering, particularly through the lack of material necessities. Being amongst the more fortunate members of this society it is, therefore, a no brainer for me to extend a helping hand whenever or wherever necessary through monetary and other contributions, to the best of my abilities. After all I am not going to take it with me. However, I don't want to give the impression of being great, or having done anything special. In fact I feel that by giving I have received far more in return. The feeling of personal satisfaction and peace that I get by giving is absolutely more valuable.

Norton Kothari

NANJI FAMILY FOUNDATION

Motivated by a desire to give back to their adopted country of Canada, the Nanji family has donated millions of dollars to hospitals and causes that are closest to their hearts.



Giving back to a community that has given so much to us is just the right thing to do.

Pyarali Nanji



Jo-Anne Ryan in conversation with
Rikki Kadri, Vice President, Portfolio
Manager, Private Investment Advice

Rikki Kadri

Jo-Anne: Tell us why the recent events in Lebanon have impacted you?

Rikki: Being from Lebanese and European origins, and as a first-generation immigrant, I have ties to those parts of the world. With family members and friends in Beirut, young and old, no one has been spared the physical and psychological damages of the explosion. I feel their pain.

Jo-Anne: Is philanthropy important to you?

Rikki: Yes, in my 15 years at TD I've organized charitable giving initiatives with corporate partners, raising funds for schools, hospitals, the Musée Des Beaux Arts de Montréal, and most notably the Cedars Cancer Centre in Montreal.

Jo-Anne: Tell us about the organization Nusaned.

Rikki: I was introduced to the non-governmental organization Nusaned through the vice-president and lead on the Roofs That Shield program, Rana Samara Jubayli. She is a friend I've known for years, as well as a McGill graduate, architect, and American University of Beirut professor, with a Masters in post-war reconstruction. She lives and works in Beirut.

The NGO started as a project to improve the quality of living in the impoverished communities of Lebanon. This includes shelter and community space rehabilitation, delivering relief goods (food parcels, hygiene kits), improving basic living standards and future sustainability projects. After the recent explosion, the focus of the organization has turned to rehabilitate the devastated parts of Beirut.

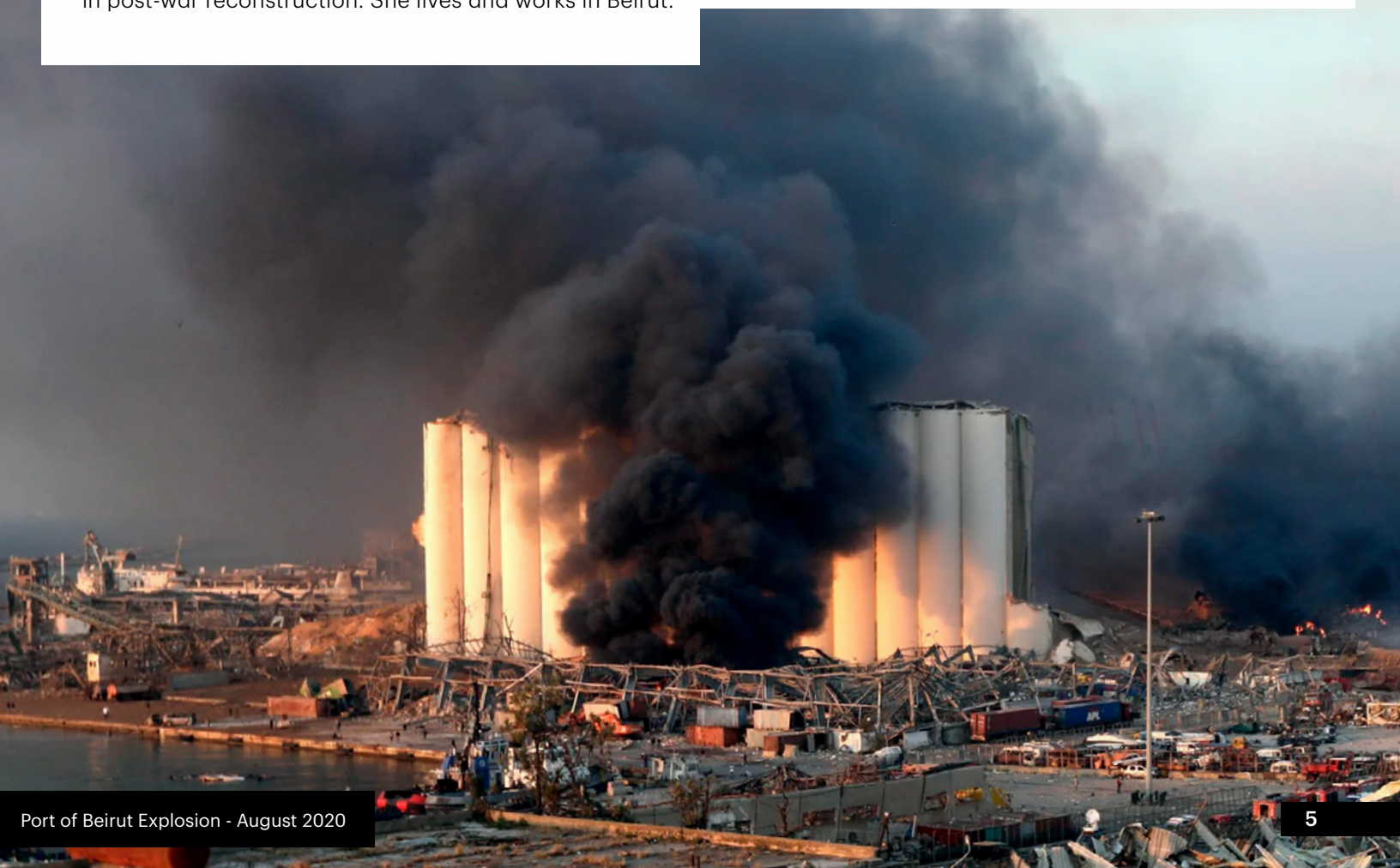
Jo-Anne: Why does Nusaned resonate with you?

Rikki: Early on I recognized that Nusaned, being a grassroots organization, was not structured to offer tax receipts to Canadian donors. With the support of PGF, I was able to coordinate a partnership with the KBF Canada Foundation (<https://www.kbfcanada.ca>). As a result, Canadian donors will now be issued a tax receipt from KBF Canada, who will then ensure that the much-needed funds are directed to Nusaned in Lebanon. Also, PGF donors may now direct funds to KBF Canada to support this project.

Jo-Anne: Why support Nusaned?

Rikki: While there are many noble causes out there, in this case, I appreciate the grassroots approach of this particular NGO. It's a lean operation, led by people whose values are directly aligned with the organization.

For more information on how to support this project, please contact Rikki.Kadri@td.com. □





David Thomson

In memory of David Thomson

It is with great sadness that I announce the passing of David Thomson in February 2020. David was on the PGF Board since its inception in October of 2004. He was Chair for many years, and then Chair Emeritus until September 2019. I thoroughly enjoyed working with David on PGF for 15 years. I found him to be intelligent, compassionate, and a total gentleman. In his obituary, it mentions that after he reads a book, he gives it away to someone. I was fortunate to be on the receiving end of many of his books as well as his knowledge and kindness.

A heartfelt thank you to Sheilagh and Doris and welcome Thomas and Julia

As part of PGF's formal Board succession plan, Sheilagh Johnson, Board Chair, and Doris Chan, Board Secretary, have retired from the PGF Board effective September 21, 2020. We would like to express our deepest gratitude to both Sheilagh and Doris for their years of service to PGF. We are also pleased to welcome two new Board members, Thomas Jedrej and Julia Gorman. Both Thomas and Julia have extensive knowledge of and experience in the charitable sector and we look forward to working with them. In addition, Nicole Nakoneshny has taken on the role of Board Chair and Thomas Jedrej has assumed the role of Board Secretary.



Thomas Jedrej



Julia Gorman

With Gratitude

On behalf the PGF Board of Directors, 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 can be a great way to reduce taxes and support causes that are important to you. For information on tax-effective charitable giving strategies, please contact your TD advisor or joanne.ryan@td.com.



We welcome your questions and comments. Please direct them to joanne.ryan@td.com or call **416-308-6735**.

Jo-Anne Ryan, Vice-President, Philanthropy, Wealth Advisory Services,
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