Enabling Charities & Donors to Achieve More

2018-2019 Annual Impact Report
OUR MISSION

To inform, inspire, and connect donors and charities, and to democratize access to effective technology and education in the charitable sector.

OUR VISION

We envision a society in which all Canadians are committed to giving and participating in the charitable sector, and in which all charities, regardless of size, have the capacity to increase their impact.
TABLE OF CONTENTS

Message from Our CEO and Board Chair  1

Key Initiatives

Tools for Enabling Charity Success  2

Connecting Donors and Charities  6

Strengthening the Charitable Sector  9

Challenges and Opportunities  13

Financial Report  15

Thank You to Our Supporters, Funders & Partners  16

Governance  17

Leadership Team & Advisory Council  18
At CanadaHelps, we enable passionate people to change the world. We witness this each day with the stories of our charity partners, and the dedication of people who use CanadaHelps to donate, fundraise, and learn. At the end of another strong year, we are so honoured to look back at all we achieved for the charitable sector.

- We reached $1 billion in all time donations! Our incredible momentum in the last few years means that the next billion won’t be far behind.
- We enabled $197 million for charities in Canada this year.
- 27% more charities registered for our services this year, and more than 20,000 charities now use our tools to easily and affordably raise money online.
- Nearly half a million donors used CanadaHelps to support causes they care about.
- Nearly 49,000 Canadians made monthly gifts to at least one charity they love.

These numbers give us hope because they demonstrate how much commitment there is in Canada to supporting the work of charities. But as we saw once again in our 2018 Giving Report, there is a funding crisis in the charitable sector driven largely by changing demographics and attitudes towards charitable giving. Canadian donors are the solution to this crisis, and we believe CanadaHelps plays an important role in turning the tide. This is why we invested this year in our own infrastructure and capacity, continued to optimize our core tools for charities and donors, and developed two new products – a Donor Management System for charities, and cause-based giving for donors – that will be launched in the next fiscal year.

Much of our work provides behind-the-scenes infrastructure for a charitable sector made up of mostly smaller charities, so we must be strong as an organization to ensure the success of the charities and donors that rely on us. This year, we developed and implemented our core values to guide us as we continue to grow as an organization; conducted a thorough review of all our policies and contracts to ensure we are compliant with data protection regulations, thereby reducing the legal and risk burden on charities; renovated and moved into new office space; and continued to expand our team in strategic areas. We also know that our tools for charities must be accompanied by support and education to help charities use them successfully, which is why we continue to invest in our support and charity success teams.

Finally, we wrapped up our strategic planning process to guide our direction for the next few years. In this process, we affirmed that CanadaHelps — with its genuine commitment to doing right by charities, and an independent charitable structure that ensures all it earns is reinvested back into the charitable ecosystem — will continue to provide meaningful value for the sector and that our work will continue to be vital, even in an environment of emerging for-profit and corporate-backed charity competitors. Our first billion in donations took 18 years; the next billion may only take five. Our momentum is strong, and with the support and trust of our charity partners and donors, we will continue to use it for good.

MESSAGE FROM OUR CEO AND BOARD CHAIR

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Marina Glogovac
President & CEO

Ruth MacKenzie
Board Chair
KEY INITIATIVES:
TOOLS FOR ENABLING CHARITY SUCCESS

When we launched Customizable Donation Forms, the first product in our suite of tools for charities in 2013, it was in response to the gap in fundraising tools available to smaller charities in the market. At the time, thousands of charities were happy to link to their Charity Profile on our website, but they needed access to the kind of optimized tools that for-profit e-commerce companies and larger charities were using. Following the launch of our Customizable Forms, we went on to develop our Peer-to-Peer Fundraising and Ticketed Events Management tools. None of these has stayed the same since launch, with technology trends requiring near constant optimizing and iterating, but they remain core tools for charity fundraising success. And because we offer all our tools with no sign-up or set-up fees, there are no barriers for adoption for charities – an important piece of our Mission to democratize access to technology.
CUSTOMIZABLE DONATION FORMS

Our Customizable Donation forms enable charities to offer an easy-to-use donation form on their own websites which have been optimized for their fundraising success. This fundamental tool in charities’ fundraising toolbox offers embeddable, mobile-optimized pages, with options for tribute-first giving, one-time and monthly gifts, branded tax-receipts and thank-you emails, and much more. Each form can be customized for the individual charity, and for the specific campaign type, enabling a fully branded experience for charities, and a seamless user experience for donors.

In addition to continuing to enhance the form design and functionality, this year we added a feature to enable charities to order the way their funds are displayed on the form. It sounds simple, but it is important for charities that raise funds for a number of projects or different initiatives and need to guide their donors to the right place through an efficient user experience, as well as to make fundraising appeals more clearly targeted.

DONATION FORM IN ACTION

In May, Nova Scotia SPCA Enforcement Officers rescued a badly injured dog they later named Bear. Bear had been kept outside most of his life and was found with porcupine quills in his face, which had become badly infected, sores on his body, an ear infection, and generally poor hygiene. The team at Nova Scotia SPCA needed to move fast and were looking for an easy way to execute their fundraising campaign for Bear, and enable social sharing to reach as many dog lovers as possible. They put together an urgent appeal using a CanadaHelps Customizable Donation Form; they were able to reach 1000 new donors and raise nearly $40,000 in 24 hours, the most they’d ever raised in a campaign before, and enough to pay for the urgent medical care Bear needed to survive. Once healthy, Bear found his forever home in a loving family with two young boys.
TOOLS FOR ENABLING CHARITY SUCCESS

TICKETED EVENTS

Our brand-able and embeddable ticketing tool, which is designed to meet the specific needs of charities, including pre- and post-event split-receipting, mobile optimization, and real-time management, continues to grow in popularity. This year, we modernized the look and flow of the ticket purchase for improved usability and donor experience. We also gave charity administrators the ability to add offline ticket sales to their event; this streamlines the issuance of tax receipts, makes reports more accurate, and ensures that all purchasers of event tickets (both online and offline) have a consistent ticket and tax receipt experience.

- **33% MORE CHARITIES RAN EVENTS THROUGH CANADAHELPS**
- **6.5 MILLION FOR CHARITABLE WORK**

EVENTS PLATFORM IN ACTION

The *I Heart Neighbourhood Charity Auction* brought together a wide spectrum of caring and compassionate community organizations to celebrate the importance of neighbourhood. This unique, collaborative fundraising event involved five different community organizations, The Neighbourhood Group, Bellwoods Centres for Community Living Inc., Business in the Streets, Regent Park Focus Youth Media Arts Centre and UrbanArts, working together to raise much-needed funds to support vital programs and services. Collectively, the five agencies serve 50,000 Torontonians each year. When choosing a tool, the group needed a branded page that suited their specialized event, that was easy to manage for administrators, and easily shareable for supporters. Through the CanadaHelps Events platform, the *I Heart Neighbourhood* event raised more than $100,000.

Learn more about the first *I Heart Neighbourhood event on our website.*
TOOLS FOR ENABLING CHARITY SUCCESS

PEER-TO-PEER FUNDRAISING (P2P)

Our powerful P2P platform gives charities the ability to run team-based or individual fundraising events, controlling the branding and reporting of the campaigns, while also giving fundraisers the tools to succeed, including default imagery, copy, and fundraising goals. As always, our P2P pages are mobile-optimized, easy to use, and ready for social sharing.

This year, in addition to modernizing the look and flow of the registration form for donors, our tool now offers charities two powerful solutions in one: charities can continue to host team-based walks, runs and "thons," but now can also enable third-parties to raise funds for the charity outside an organized P2P event – from corporate partners to individuals hosting fundraising occasions, like birthdays, weddings and memorials. We also gave charities the ability to run P2P events with a registration fee, streamlining the sign up experience for the fundraiser so they start their campaign off on the right foot.

- **37% MORE CHARITY P2P CAMPAIGNS THIS YEAR**
- **$7.65 MILLION RAISED BY CHARITIES USING THIS POWERFUL TOOL, 40% YOY GROWTH**

Birds Canada works throughout the country to conserve wild birds through sound science, on-the-ground actions, innovative partnerships, public engagement, and science-based advocacy. In their annual peer-to-peer campaign, The Great Canadian Birdathon, bird-lovers joined together and ventured out into the Canadian outdoors to identify birds and raise funds to advance science and conservation. The top fundraising team, The Warbler Hunters, spent 15 hours in a single day in Ontario in May searching for and identifying 140 species of birds! The 2019 event brought together 462 participants and 90 teams to raise over $200,000 for the cause.
Half of our dual mission is to inform, inspire and connect charities and donors. Through our website, we offer a number of ways to help the 1.6 million people who visit our site each year find a charity to support.

- Donors continue to come back to CanadaHelps.org each year because of the simplicity, ease-of-use, and trust. This year, we continued to improve the donor experience: It’s now easier than ever for donors to manage monthly gifts and access their saved tax receipts within their CanadaHelps donor accounts; and we also modernized the look and flow of our donation and gifts of securities forms, and refreshed our successful Charity Gift Card designs.

- We activated our Crisis Relief Centre for three urgent crises. Generous Canadians pooled their resources to support those affected by Cyclone Idai in southern Africa, the devastating earthquakes in Indonesia, and the 2018 wildfires in British Columbia. We also continue to drive support through email outreach and social media for the ongoing Syrian Refugee crisis.

- Our Fundraising Pages are an easy way for people to crowdfund for charities they love. This year, thousands of Canadians created fundraising campaigns, raising more than $4 million.
Canadians are known around the world for being kind and lending a helping hand to people in need. In June 2019, CanadaHelps, and partner GIV3, celebrated the fifth annual Great Canadian Giving Challenge (GCGC), a national contest that gave Canadians the chance to win $10,000 for their favourite charity. Canadians from coast to coast answered the call and gave generously, making the fifth year our best year yet!

Donations in June were 25% higher this year over last year, and 164% higher than in June 2014, the year before the GCGC was launched. Even more than donations, this initiative is an amazing opportunity for charities to engage directly with their donors and generate excitement during a time of year that is typically low for donations. Charities across the country launched social media campaigns, made videos, shared their mission through email outreach, and connected with their donors directly.

“Every student should have equal access to science education. Support @IISD_ELA this #GivingChallengeCA to help students with limited financial means experience first-hand the #WholeEcosystem research that takes place at world’s #freshwater laboratory.”

Twitter user @dlbryns in support of IISD Experimental Lakes Area

“Arthritis is about so much more than aches and pains. It’s an invisible disease that is often misunderstood. It’s MORE serious than most people think. Help us win $10,000 so we can conduct research that saves lives. #GivingChallengeCa”

Arthritis Research Canada, @ArthritisARC on Twitter

“Winning would allow us to provide 30 more children with six weeks of grief support following the death of a parent or sibling.”

Bereaved Families of Ontario, @SwBfo on Twitter
GivingTuesday, an international, grassroots movement focused on a day of giving after two big shopping days, was launched in Canada in 2013 by CanadaHelps and Giv3.

Celebrating its sixth year in Canada, GivingTuesday had another record-breaking year in 2018, kick-starting the holiday giving season for Canadians and people around the world. In Canada, the day was celebrated by more than 6,500 partners, and millions of Canadians stepped-up to support their favourite causes.

GivingTuesday continued to see growth in donations reported by CanadaHelps and other online donation platforms. Since GivingTuesday began in Canada in 2013, CanadaHelps has seen an increase of 785% in donations on the day (over 2012, the year before GivingTuesday Canada started).

From coast to coast, more than 40 communities organized local movements, demonstrating that grassroots giving involving schools, businesses, charities, and individual Canadians is alive and well. Mayors and provincial premiers from across the country proclaimed November 27th as GivingTuesday in their jurisdictions. Within each community, acts of kindness and giving were performed, including hugs for charity, blood donations, food and toy drives, financial donations, and much, much more.
KEY INITIATIVES: STRENGTHENING THE CHARITABLE SECTOR

The Giving Report reveals new trends and insights around charitable giving in Canada. For the second annual report, we wanted to invite Canadians into the charitable sector to see what we at CanadaHelps see every day: Canada's charitable sector is big, it's innovative, and it's important. The interest of Canadians, those in the sector, and the media was fabulous, with nearly 35,000 visits to our microsite, more than 5500 downloads of the report, and more than 22 million media impressions.

Throughout our history, CanadaHelps has played an educational role within the charitable sector. We've hosted a successful national conference, hosted in-person workshops, and launched an online course for charities on Digital Fundraising, and Donor Acquisition and Retention that was unparalleled in the sector. Our focus in recent years has been on the creation of digital fundraising whitepapers, webinars, tip-sheets and other accessible content, as well as onboarding charities to our tools to ensure they kick off their fundraising successfully using best-practices.

This year we:

As a true partner to the charities we serve, now more than ever we feel a responsibility to help charities adapt to the digital nature of the world. In the next fiscal, we will increase the number of these resources that we produce for charities.

Our Support, Success, and Engagement teams speak with hundreds of charities each day. Our Engagement and Success teams offer free advice and set-up for charities to ensure they know which tools are best for their needs, and to get them off to a strong fundraising start. Our team also began hosting CanadaHelps Fundraising Tool workshops for charities in Toronto. We received such positive feedback, we are planning more workshops across the country in the next fiscal year.

Our small support team offers a free, bilingual help desk for both charities and donors, meaning charities that are registered with CanadaHelps and use our fundraising tools don't have to take on this support work on their own. As the number of charities and donors we serve grows each year, so too does the case volume our team handles, so we are always looking for ways to serve customers better and more efficiently.

This year, we began offering extended support hours for charities and donors throughout the holiday giving season, including evening and weekend hours. We also introduced Live Chat on our website for charities to allow our team to serve more customers, and make reaching out even easier. We've also continued to build out our Help Portals for both charities and donors to ensure support at any hour is at our users' fingertips.

ADVOCATING FOR CHARITIES

Throughout the year, our team speaks and writes about the needs of the charitable sector, and smaller charities in particular. These are just a few excerpts from articles written by our CEO, Marina Glogovac. Read more from Marina on the Giving Life Blog.
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This year we:

- **produced** 12 new educational webinars for charities
- **reached** 6600 registrants
- **published** 41 new blog posts for charities
- **created** 2 new whitepapers and guides

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CHARITY AND DONOR SUPPORT, AND CHARITY SUCCESS

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"I would advise any charity to use CanadaHelps for their events, for their campaigns, for their peer-to-peer fundraising. I’ve never made a call to CanadaHelps where I haven’t been treated with respect, and they always get back to me with the help that we need."

Laina Gibson
VP of Philanthropy & Communications
The Neighbourhood Group.
ADVOCATING FOR CHARITIES

Throughout the year, our team speaks and writes about the needs of the charitable sector, and smaller charities in particular. These are just a few excerpts from articles written by our CEO, Marina Glogovac. Read more from Marina on the Giving Life Blog.

"Why should we care about the survival and success of the charitable sector? Healthy charities in Canada are important for all Canadians, and we’re unlikely to truly understand the social and economic gaps left by failed charities until it is too late. These organizations reflect the increasing diversity of our country; they engender greater inclusion in all aspects of Canadian life; they fill gaps in the health and welfare of people and communities that our governments are slow or unwilling to close; and they can spur transformational innovation by injecting seed capital into novel research in a manner that traditional funding mechanisms do not often allow for."

From “Step One: Mindset Shift. Innovation in the Charitable Sector” by Marina Glogovac and Teresa Marques in Policy Magazine.

"Canadians, by and large, recognize that charities are a necessary part of our social fabric. Canadians regularly and generously donate time, money, and goods to charities that enrich their lives, serve communities they care about, or simply do good things they wish to support. But when evaluating charities, many donors want their support to go exclusively toward program delivery and not into staff, operations, technology, or training and development — as if the two are completely unrelated. This means that charities are afraid to invest in themselves, and are capacity, technology, and infrastructure-starved. This lack of investment makes charities less effective, which is completely contrary to the shared goals of donors, charities, government, and society as a whole.... So my challenge to you is this: next time you are researching the charity you want to support, look for metrics and stories that enable you to evaluate how well they are achieving their mission. And then ask yourself, if they invested in themselves more, could they have a greater impact on the world?"

From “Overhead Shouldn’t Be a Dirty Word”

“I’ve written many times that charities underinvest in themselves in response to persistent donor and public expectations – they pay below-market salaries, don’t invest in training, and often don’t have the tools they need for the job – and this is threatening their ability to succeed. In a sector dominated by women and in a society where women have historically been expected to do caregiving and support labour for free (which is a lot of the types of work charities do), this expectation that charities should sacrifice for the cause is no doubt fed by the way we value women’s work."

From “Closing the Wage Gap this International Women’s Day”.
There has never been more validation for our Mission and what we do as an independent charitable organization. The charitable space continues to be dynamic and attractive to both technology start-ups and established tech and payment companies as more donations move online (following a broader transition to online in other spheres). As a result, our success and the low barriers to entry in this space have attracted new entrants, and increased investment from current players offering fundraising technology to charities at a profit.

As charities across the country are struggling to keep up with the rapid pace of change in technology and donor preferences and behaviours while the demand for their services increases and funding decreases. CanadaHelps has a unique opportunity to help charities through this challenging time by providing them with the tools and know-how that are necessary for their survival. There is lots of advice available to charities online, but a high volume of advice does not make it good advice. As a mission-led organization that is invested in charities’ success, we want to ensure that charities have the best advice. To do this, we need to reach more charities by investing in educational tools, marketing, outreach to charities, and our charity success programs.

We also have the opportunity to be innovative in our approaches to engaging younger donors in the charitable sector. In the next fiscal, we will launch the first phase of our cause-based giving program, which is a new way of facilitating giving based on donor preferences for causes and direct engagement. With this initiative, we also hope to direct more giving to smaller charities to help even out the giving distribution curve. Once launched, there will be opportunities for iterating on this concept, as well as further innovation to continue to engage donors. In this time where giving trends are worrisome, it is essential that we try out new approaches and be willing to learn and change as a sector.

But our biggest opportunity is our forthcoming Donor Management System (DMS) for charities. This fully integrated tool will give smaller charities — those with no DMS system currently, or those using systems that are too complex or expensive for their needs — access to and management of vital
fundraising and donor stewardship information. It will be affordable and useful, built with the guidance of experienced fundraisers and the input of charities. However, what sets this tool apart is that charities can fully manage data from their integrated CanadaHelps fundraising tools, offline fundraising data, and gifts made to their charity through CanadaHelps.org. This is a big project that will keep us busy for years to come, but it will be transformative — both for CanadaHelps as it opens up a new sustainable revenue stream to support our Mission-based work, but also for the large swath of the sector that, until now, hasn’t had a proper tool to meet their needs.

With these incredible opportunities, we also continue to face challenges. Like all charities, generating enough money to fund our work is difficult without external financing while also keeping our rates low — especially as we face increased costs for technological and digital talent, investment in cyber security and fraud prevention to protect donors and charities, and product development. It is also increasingly challenging to continue to provide the valuable and trusted platform that we do in a crowded, and ever-changing market of technology companies that are providing fundraising tools as part of their broader business and shareholder-based strategies.

As an independent charity for nearly twenty years, we've built solid trust within the sector and deep relationships with our charity partners for which we are grateful. As the online space grows in size and inevitable fragmentation occurs, we will keep redefining and refining the best value proposition and best tools for our donors and charities, stay ahead of the threats on the horizon, and be proactive so as to seize the best opportunities related to advancing our Mission and Impact amid these changes.
$189,726,784
TOTAL DONATIONS
Excludes donation and ticket purchase revenue through our Events platform

$11.8 MILLION
IN DONATIONS OF SECURITIES

17%
OF OVERALL DONATION REVENUE COMES FROM MONTHLY GIFTS

23%
MORE DONORS MADE MONTHLY GIFTS

23,178
CHARITIES RECEIVED GIFTS THROUGH CANADAHELPS LAST YEAR

GIVING THROUGH CANADAHELPS

GIFTS DISBURSED TO CHARITIES
OF THE $189.7M DONATIONS OF CASH AND SECURITIES, 96% WERE DISBURSED TO CHARITIES

CanadaHelps is committed to financial transparency, which is why we make our full Audited Financial Statements available on our website.
THANK YOU TO OUR SUPPORTERS, FUNDERS & PARTNERS

CanadaHelps could not do all that it does without the support of individual donors, partners, and funders.

We are especially grateful to the more than 75,000 Canadians and key corporate and foundation funders who included CanadaHelps in their giving plans this year. These gifts provide critical funding for our operations to enable all the work we do. There are so many important causes in this country that need support, and capacity building is often overlooked; but by supporting CanadaHelps with a donation, these individuals and organizations have supported the entire charitable sector.

We are also thankful for the partnership of more than 20,000 Canadian charities who choose to use CanadaHelps’ tools for their own fundraising. As a largely self-funded organization, we can achieve our own mission on a very thin margin because of our scale and reach in the sector. From each transaction we process, we keep approximately 2% which is used to build and maintain our technology platform, support our full team and operations, and resource the very necessary and mission-driven activities (like education) we take on for the sector.
CanadaHelps is governed by a volunteer Board of Directors who follow best practices for board governance, and provide broad strategic oversight to ensure that all of our resources are used in pursuit of the organization’s Mission and mandate. The Directors are experts in their respective fields, drawn from both the public and private sectors. They receive no financial compensation, and serve on one of two standing committees. The Board and each committee meet quarterly for a total of 12 meetings each year.

**The Finance and Audit Committee** oversees the financial affairs of CanadaHelps, receives the initial report from the auditor, and works with the executive management of CanadaHelps on the strategic allocation of financial resources in executing the Mission of the organization.

**The Governance Committee** oversees the governing affairs of CanadaHelps, working to improve the work and function of the Board of Directors and ensure alignment with the Mission and Vision of CanadaHelps. This committee also nominates candidates for the Board, and acts as a review and selection committee for chief executive management.

**BOARD & COMMITTEE MEMBERS AS OF JUNE 30, 2019:**

**Ruth MacKenzie** - Chair  
President & CEO, Canadian Association of Gift Planners

**Denise Baker** - Vice Chair and Secretary  
Former Executive Director, The Vantage Point

**Anita Ferrari** - Treasurer  
Former Partner, Grant Thornton LLP

**Hershel Harris** - Chair of the Governance Committee  
Impact Team Advisor, Georgian Partners

**Andrew Heintzman**
Managing Partner, InvestEco

**Lawrence Mandel**
Director of Engineering, Shopify

**Alan Middleton**
Distinguished Adjunct Professor, Schulich School of Business & Executive Director, Schulich Executive Education Centre

**Sarah Morgenstern**
Director, Business Development, Cubane Consulting
LEADERSHIP TEAM & ADVISORY COUNCIL

STAFF AND LEADERSHIP AS OF JUNE 30, 2019:
CanadaHelps is a team of 48 staff, led by a dedicated group of experienced leaders who are passionate about using technology to drive positive change in the charitable sector.

CanadaHelps Executive Team:
Marina Glogovac, President & CEO
Jane Ricciardelli, Chief Operating Officer
Mike Stairs, Chief Technology Officer

ADVISORY COUNCIL
The CanadaHelps Advisory Council is composed of experts in their respective fields, drawn from both the public and private sectors. As champions of CanadaHelps, Council members contribute their skills and expertise to help CanadaHelps continue to provide leading edge programs and services. Advisory Council members serve as volunteers because they believe in our Mission and our purpose. We’re deeply indebted for their support and the invaluable gifts of their time and knowledge.

Michael Bradley, Managing Director, NorthCard
Matthew Choi, Associate Professor McMaster University, Pediatric Surgeon, McMaster Children’s Hospital, and Co-founder of CanadaHelps
Wayne C. Fox, Managing Partner and Chairman, Cygnus Investment Partners Inc.
Karim Harji, Managing Director, Evalysis
Patrick Johnston, Philanthropic Advisor, Borealis Advisors
Bill Kerr, Director, benefitexpress
Ryan Little, Global Business Development Manager, Impact Hub, and Co-founder of CanadaHelps

Joan McCalla, Former Distinguished Fellow, Internet Business Solutions Group, Cisco Systems
Aaron Pereira, Project Lead, The Wellbeing Project, and Co-founder of CanadaHelps
Jesse Rasch, Founder and Managing Director, Hedgewood
Sue Tomney, Chief Executive Officer, YWCA Calgary
Sean Van Doorselaer, CEO, Lind Equipment
Alec Zimmerman, Former Partner, Borden, Ladner, Gervais LLP

A Note on Staff Compensation
CanadaHelps strives to be an employer of choice. As such, our objective is to hire and retain high quality staff members, while carefully managing expenses, so that we can provide effective technology and the tools and educations charities need and deserve. Our staff salaries are fair and competitive, and we use similar organizations as a guideline for our compensation packages.
CanadaHelps
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www.instagram.com/canadahelps

Charitable Registration Number: 896568417RR0001