



# 2022 ANNUAL REPORT

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## Mission

The Edmonton & Area Chapter of AFP upholds the goals of the international Association of Fundraising Professionals organization and advances philanthropy in the Edmonton region by enabling members, prospective members, and representatives of other organizations to practice ethical and effective fundraising.

The Edmonton & Area Chapter fulfills our mission primarily through education and training, promoting credentialing, providing resources, networking, mentoring, advocacy, and recognition.

## Vision

We strive to make sure fundraising is recognized as a credible and respected profession for the betterment of our communities.

## Core Values

**Philanthropy:** The belief that ethical and effective fundraising are the cornerstones of philanthropy and that philanthropy changes the world.

**Community:** Embracing diversity in the fundraising community with a commitment to understanding and addressing the shared and unique needs of all members of the community.

**Collaboration:** Recognizing that we can only accomplish our purpose with the strong support and partnership of other individuals, AFP chapters, and groups who share our vision.

**Knowledge:** Providing the fundraising community with the highest quality of knowledge, research, advocacy, career support, new information, strategic alliances, and related insights and tools to ensure a successful.

**Professionalism:** Conducting business according to the highest ethical principles and servicing as trustworthy stewards of our resources.

**Relationships:** Understanding that our focus is on service to our members, stakeholders, and customers, and that our service is open to new ideals, exceeding expectations, and provided in a timely and thoughtful manner.

# PRESIDENT'S REPORT

Hello AFP Members, colleagues, partners and community,

Time has flown by! I feel like we were just gathering for our AGM last year for the first in-person meeting since the pandemic began to wind down. Since then we've had a very busy 12 months.

In November we returned to the beautiful space at Hall D in the Edmonton Convention Centre for our first back in-person National Philanthropy Day luncheon, sponsored by Edmonton Community Foundation. With over 450 guests in attendance, we celebrated 91 award recipients who embrace philanthropy in the most extraordinary way.

This year, the AFP Edmonton & Area Chapter achieved the IDEA Champion designation and the Ten Star Gold designation as an organization striving for excellence. Knowing the power of connection to keep this profession thriving, our membership committee launched a mentorship program and the IDEA committee partnered with AFP Manitoba to begin an IDEA book club. Sixteen energetic fundraising professionals graduated from the Fundamentals of Fundraising course in March and a number of fantastic education sessions were organized by the education committee.

Our board closed out our 2022 financial year in a healthy financial position that ensures we set up the Chapter for success. I applaud the work of the board to strike an excellent balance of organizational health and commitment to delivering high quality events and programs.

I want to thank the board members who will be leaving us at the end of 2023 and who have committed exceptional time and energy to volunteering with the Chapter. Each one of these board members have brought an incredible impact to our membership and I can't thank them enough for their service. Please join me in thanking Nafisa Bowen, Felicia Hodgson, and Nicole Bray (as of Feb 2023) for everything they have done to raise the profile of this profession in the community and for continually holding true to the values we all believe in.

As we look towards a new Chapter year that will begin in January 2024 we are quite excited to welcome new voices and perspectives to the team that passionately delivers high quality programs and opportunities to our membership. If you are interested in getting involved, don't hesitate to join this group.

It has truly been an honour to serve you, our membership, as your president for these last two years. I have deep respect for this community and all that we do for each other. As many of you well know, it can be easy to face burnout as a fundraiser but it is also incredibly rewarding that we have the privilege to do this work. So together let's celebrate our collective successes and let's support each other through our times of struggle. Let's continue to advocate for a community where every single person feels a deep sense of belonging.

As I look ahead to the upcoming years with our Chapter, I am filled with great hope as we welcome an incredible colleague to the role of president. Jaime Caza leads with a calm, thoughtful and strategic approach and I'm eager to see our membership thrive under her leadership. Jaime, your brilliant light shines brightly and I'm confident you will guide us with unwavering strength through this next stage of our Chapter's journey.



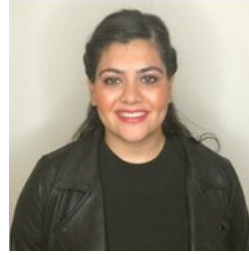
**Kelly Hoskins, CFRE**  
**President**

# 2022/2023

## CHAPTER BOARD



Kelly Hoskins, CFRE  
President



Sabrina Ali  
Past-President



Jaime Caza, CFRE  
President-Elect



Candace Smallwood, CFRE  
Vice-President,  
Community Engagement



Alex Abboud  
Director, Government  
and Sector Relations



Amanda Adkins, CFRE  
Director, Education



Nafisa Bowen, CFRE  
Director, IDEA



Corrie Fortner, CFRE  
Director, Membership



Felicia Hodgson  
Director, National  
Philanthropy Day



Justine Pelletier  
Director, Chapter  
Development



Aimee Winegarden  
Director, Communications

# CHAPTER ACHIEVEMENTS

Thanks to the hard work of our chapter membership and board, we were honoured to be awarded with the AFP Ten Star in 2022. The Chapter Ten Star Award honours those chapters who have accomplished many of the key objectives outlined in the AFP Global strategic plan. The award encourages chapters to perform specific activities designed to increase professionalism within fundraising.



Our chapter successfully achieved the 2022 IDEA Champion Designation for work completed in 2021. The IDEA Champion Designation recognizes those chapters who have accomplished many of the key objectives outlined in the Promote Inclusion, Diversity, Equity and Access strategic pathway. This designation encourages chapters to perform specific activities designed to increase IDEA within fundraising, and public awareness of the importance of philanthropy in all cultures.

# 2022 CHAPTER UPDATES

## IDEA

### Inclusion, Diversity, Equity & Access

AFP Edmonton and Area is committed to the principles of inclusion, diversity, equity and access (IDEA) in the fundraising profession, the philanthropic sector, and throughout all of society.

Events across AFP have highlighted there is much work to be done to ensure all fundraisers feel supported, included, and respected. As a chapter, we continue to learn and grow to ensure we practice the principles of IDEA. We are dedicated to this work and encourage all our members to continue on their learning journey.

Highlights from 2022 include:

- In partnership with AFP Manitoba Chapter, we launched the IDEA Book Club as a great opportunity to connect with colleagues, and share thoughts, challenges, and best practices around issues of IDEA in our work and life.
- We held an IDEA in action panel which brought together speakers from diverse backgrounds to educate and share their perspectives on IDEA.
- The committee created an IDEA pledge for new and recurring members as part of our onboarding process.

Thank you to IDEA committee members Lisa Dayanandan, Donna Ma, Corrie Fortner and Jamie Caza for your commitment to increasing inclusivity, diversity, equity and access in our chapter.

We look forward to continuing our work in the upcoming year!

**Nafisa Bowen, CFRE**  
**Director, IDEA**



# Membership

AFP Edmonton & Area Chapter Board and Committees have worked hard to serve the membership throughout the year. The Membership Engagement Plan is interwoven into all aspects of our work. We are delighted to celebrate rising numbers in our membership and positive feedback and support coming via email and the member survey.

We are working through database transitions with AFP Global. Staying in touch with our membership has been significantly more challenging due to the database change. We continue to do our very best to be proactive in welcoming new and renewed members and reaching out to lapsed members via email. Prior to the system change, we were at a record number of chapter members since the impact of the pandemic in 2020.

We are pleased to say that we have activated our Mentorship Program and are currently working on making matches for the new professionals with those that have had more experience.

Another win for the Membership Committee this year was the growth of the committee. I would like to say a personal thank you to Amanda Bell and Santana Febrey for working with me to try to improve member services. Working as a volunteer on the Committee can be fun and rewarding and meeting great people is my favourite part. The Membership Committee goal is to serve members, and so the Chapter continues to celebrate and support the sector, providing scholarships, educational workshops, networking opportunities, National Philanthropy Day, the AFP Global portal and other member benefits such as social media interactions and the newsletter

AFP Edmonton & Area is a proud professional organization. We strive to support our members through our volunteer efforts. Your participation on committees and the board help to strengthen all of us. We have a lot of work ahead and welcome you to join us. We are here to support you and look forward to connecting, learning and growing with you in the year ahead.

**Corrie Fortner, CFRE**  
**Director, Membership**



**Every Member Campaign**  
Advancing Philanthropy Through Philanthropy





# Education and Professional Development

A key focus for the AFP Edmonton & Area Chapter is to provide relevant and engaging educational and professional development opportunities for our members. This year we began offering in-person sessions once again following a two year shift to online delivery of all our education offerings due to COVID-19 gathering restrictions.

AFP Edmonton and Area Chapter has continued offering education sessions and were proud to host six breakfast/lunch sessions, featuring a wide range of topics including: “Exploring Inclusivity, Diversity, Equality and Accessibility in Fundraising” with a panel of experts including Constance Scarlett, Zachary Weeks, Michelle Okere and Erin Davis and hosted by Nafisa Bowen and Lisa Dayanandan; “Making the Ask” with Sue McCoy, “Vulnerability, Hope and Philanthropy: How Cancer (re)Shaped my Approach to Fundraising” with Lauren Patterson, “Getting Started in Crypto Philanthropy” with Amber Benders and Aimee Winegarden; “Grant Writing” with Amy Gomez.

Additionally, an in depth “Major Gifts Masterclass” led by Guy Mallabone of Global Philanthropic was held in the fall and the two day introductory fundraising workshop, “Fundamentals of Fundraising,” was held in spring 2023.

These sessions and workshops were made possible by the generous support of our sponsors, faculty members and volunteers. Thank you to Edmonton Community Foundation for your commitment and support for the AFP Edmonton & Area Chapter.

Thank you for taking part in our education sessions and programs. We look forward to another exciting lineup of speakers and events in the upcoming year.

**Amanda Adkins, CFRE**  
**Director, Education**



# AFP Communications Year in Review

July 2022 - May 2023:



13

email newsletters  
went out to our subscribers



42

job opportunities were posted to  
support our members with finding  
meaningful careers



20,000+

engagements in social media  
content



28

National Philanthropy Day stories  
were shared on NPD to celebrate  
philanthropy everyday

9% Increase in  
Followers from  
2021



461  
Followers



723  
Followers



1,280  
Followers



297  
Followers





Presented by



## National Philanthropy Day®

2022 saw the return of our in-person event for National Philanthropy Day. What an amazing celebration it was! Although previous virtual events were a huge success, there is nothing quite like getting together, shaking hands, and seeing smiles on people's faces.

As the Director of 2022's event, I was beyond thrilled to coordinate our committee throughout the year in order to celebrate the amazing philanthropists in our community. A big heartfelt thanks to the many people who volunteered on the NPD Committee.

We had over 90 heartwarming stories submitted, each one explaining the true impact that person, group, or company made to people in the Edmonton area. In the stories, we heard of all types of amazing charitable acts. Some acts were pure volunteerism — the donation of time repeatedly to ensure the cause always has hands on deck to make a lasting change in the community. We saw nominations centered around amazing and creative peer-to-peer fundraising activities — such as our Philanthropist of the Year, who raised money through sales of her handmade dolls. We also saw nominations for amazing companies that choose to increase their support of the community in pace with their corporate success through large donations — donations which help ensure organizations can carry out their missions with steadiness and excellence.

Over 450 people attended the National Philanthropy Day event here in Edmonton. Response from attendees was overwhelmingly positive. I was shocked to hear from so many of our nominees that they left the event feeling not just assured that they had made an impact, and not just thoroughly thanked, but the word that kept coming up from them was inspired. Our lovely guests left the event feeling inspired by what others were doing and excited to do more to help the people in our area who need it. Our community is truly filled to the brim with some of the best philanthropists in the world.

While mentioning the best philanthropists in the world, I must also recognize our amazing sponsors for this event, for without them, we could not make this event happen. Without the support of Edmonton Community Foundation, EPCOR, Global Edmonton, the Brick, Global Philanthropic Canada, Sentinel Storage, Burke Group, Invert 720, and Studio Post we would not have been able to return to the 2022 festivities. Our deepest thanks to these companies for their continued support.

AFP Edmonton is so excited to see you in person at National Philanthropy Day 2023 this November!

**Felicia Hodgson**  
**Director, National Philanthropy Day 2022**

# CELEBRATING NPD



CHANGE THE WORLD



WITH A GIVING HEART

## National Philanthropy Day®

# Thank you to our 2022 NPD Committee Members

Justine Pelletier, Nicole Bray, Jenn Woods, Lauren Patterson, Michelle Ngo, Candace Smallwood, Lisa Dayanandan, Nicole Mitchell, Jessica Englert, Jaime Caza, Nafisa Bowen, Joanne Hansen, Brianne Thomas, Stacey Amyotte, Cheryl Sweetman, Shae Nesselbeck, Felicia Hodgson



# Thank You to our SPONSORS

## Presenting Sponsor



## Sector Sponsor

Education Sector



## Gold Sponsors



## Silver Sponsors



## In-Kind Sponsors



# FINANCES

## 2022 Financial Summary

Balance Sheet As at Dec 31, 2022, Compared to Dec, 31, 2021

ASSET	As at Dec 31, 2022	As at Dec 31, 2021
CIBC Bank	29,169.67	53,898.43
CIBC Term Deposits	15,177.53	15,159.84
ATB Financial	30,231.04	0.00
Accounts Receivable	262.50	3,445.00
Prepaid Expense	0.00	1,288.00
Inventory	326.90	0.00
GST Owing (Refund)	453.05	
<b>Total Assets</b>	<u>75,620.69</u>	<u>73,791.27</u>
<b>TOTAL ASSET</b>	<u>75,620.69</u>	<u>73,791.27</u>
<b>LIABILITY</b>		
<b>Liabilities</b>		
President's Bursary	1,250.00	1,250.00
Unearned Revenue	0.00	0.00
Accounts Payable	1,538.94	4,752.34
		-470.52
<b>Total Liabilities</b>	<u>2,788.94</u>	<u>5,531.82</u>
<b>TOTAL LIABILITY</b>	<u>2,788.94</u>	<u>5,531.82</u>
<b>EQUITY</b>		
<b>Equity</b>		
Retained Earnings	72,831.75	68,259.45
Current Earnings		4,572.30
<b>TOTAL EQUITY</b>	<u>72,831.75</u>	<u>72,831.75</u>
<b>TOTAL EQUITY</b>	<u>72,831.75</u>	<u>68,259.45</u>
<b>LIABILITIES AND EQUITY</b>	<u>75,620.69</u>	<u>78,363.57</u>

# 2022 Financial Summary

## Comparative Income Statement

	Jan 1, 2022 - Dec 31, 2022	Jan 1, 2021 - Dec 31, 2021	Annual Budget 2022
<b>Sales</b>			
4100 - Membership dues	14,712.56	10,265.82	11,000.00
4200 - Job Postings / Broadcast	26,790.94	20,900.00	15,000.00
4210 - Consultant Listing		1,800.00	1,750.00
4300 - Interest Earned	37.64	57.55	100.00
4415 - NPD Event	57,497.60	23,250.00	25,500.00
4508 - CFRE Series		-	5,950.00
4509 - Fundamentals of Fundra	7,000.00	13,777.62	5,500.00
4630 - Education Series	7,600.00	3,235.00	6,500.00
4639 - Miscellaneous Workshoj	2,165.00	2,385.00	2,500.00
4070 - Merchandise Sales		60.40	2,500.00
4600 - Networking Event Reven	955.00		
4800 - Programs Sponsorship		5,000.00	2,500.00
4950 - AFP Cdn / Int'l			3,154.00
4900 - Other Income	250.00		
<b>Total Sales</b>	<b>117,008.74</b>	<b>80,731.39</b>	<b>81,954.00</b>
<b>Direct Expenses</b>			
5062 - NPD Main Event	59,892.19	18,566.74	20,000.00
5066 - Fundamentals	5,176.85	4,158.20	2,200.00
5068 - CFRE Review		-	2,200.00
5069 - Education Committee		-	250.00
5080 - Education Series Prograr	9,259.56	391.98	1,250.00
5084 - Miscellaneous Workshoj	1,164.90	1,130.00	4,154.00
Promotional Items			2,500.00
<b>Total Direct Expenses</b>	<b>75,493.50</b>	<b>24,246.92</b>	<b>32,554.00</b>
<b>GROSS PROFIT / LOSS</b>	<b>41,515.24</b>	<b>56,484.47</b>	<b>49,400.00</b>
<b>Expenses</b>			
5010 - Administration	5,441.57	30,532.34	15,000.00
5015 - Credit Card Fees	4,078.42	1,878.51	5,000.00
5020 - Bank Fees and Interest	150.65	116.52	1,000.00
5025 - Office Supplies	340.55	217.11	250.00
5030 - Postage		309.00	500.00
5040 - Telephone	-60.72	624.12	600.00
5050 - Board Operations	5,356.69	1,881.45	3,120.00
5055 - Chapter Travel / Training	16,212.33	925.00	11,088.00
5060 - Bursaries and Awards		650.00	1,000.00
5095 - Communications / Adve	326.32	1,093.51	1,626.00
5100 - Mentorship		-	2,800.00
5110 - Government Relations		-	500.00
5115 - AFP Canada/Int'l/Fdn	3,600.00	3,600.00	3,600.00
5120 - Networking Events	1,390.88		
5990 - Miscellaneous expense	106.25	145.50	500.00
<b>Total Expenses</b>	<b>36,942.94</b>	<b>41,973.06</b>	<b>46,584.00</b>
<b>NET PROFIT / LOSS</b>	<b>4,572.30</b>	<b>14,511.41</b>	<b>2,816.00</b>



### **Contact**

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