

THE **27** years **Crivener**

FIVE REASONS YOU NEED A WILL



YOU HAVE CHILDREN UNDER 18



YOU OWN A HOME



YOU ARE SEPARATED, DIVORCED OR LIVING IN A COMMON-LAW RELATIONSHIP



YOU HAVE PETS



YOU WANT PEACE OF MIND ABOUT YOUR FAMILY'S FUTURE



INSIDE: Wills and Other Personal Planning Documents



Maximizing the Philanthropic Impact of Your Will

Leanne at UBC Farm with a Belted Galloway, a Scottish breed of cattle

Photo: Martin Dee

When it comes to planning a Will, beyond allocating assets to family and friends, many of us wish to make bequests to charities and causes important to us.

When those gifts are sizeable, it is important that we choose recipients wisely to ensure the charities we've chosen maximize the impact of our contribution.

How do we assess the effectiveness of charities?

My passion has always been the humane treatment and well-being of animals. I have followed and supported the work of various animal and environmental protection charities over the years, but was never really sure if I was supporting the most effective organizations.

Was I being swayed to donate to those with the most evocative photographs and campaigns? Perhaps. I admit I never really did much due diligence when it came to making small donations. When I was allocating much larger gifts in my own Will, I knew I had to dig a little deeper. I wanted to ensure my legacy donations were based on more than an emotional response.

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To explore the idea, I left my marketing career in the technology sector and enrolled in UBC's graduate program in Animal Welfare. My idea was to develop a framework to help donors and foundations better assess the effectiveness of animal welfare organizations to improve

their philanthropic decision-making. I figured if I could objectively assess the controversial and emotional field of animal welfare, that tool could also be applied, with slight modification, to other nonprofit entities—to help other donors make better decisions, too.

I surveyed and interviewed the executives of 25 animal welfare organizations and foundations from across North America; their input helped me identify four common themes or pillars of importance. I refer to them as the **PREP** Framework.

Philosophy: The organization's beliefs, values, and position statements

Red Flags: Criteria that indicate problems in the organization

Efficiencies: Financial and operational conduct of the organization

People: Abilities and involvement of those who work for, with, and that support the organization

I believe the two most important aspects are Philosophy and People. They also happen to be the two easiest subjects to investigate.

Philosophy

Although an organization's stated mission and objectives provide a high-level overview of their goals, to truly understand the core values, morals, and beliefs of an organization donors need to review an organization's position statements and ethical policies. At a basic level, those statements should disclose what the organization supports and what it is against.

For example, two organizations may state their goal is to protect waterfowl and their habitat but, on closer examination, one organization proves to be a group of hunters seeking to preserve hunting opportunities, while the other is opposed to hunting and tries to conserve spaces for wild animals to live. Superficially, both groups appear to have the same goal, but their philosophies are very different.

My PREP framework provides a systematic but flexible approach to making informed judgments about organizations.

People

The calibre of an organization's people, particularly its management team, is another major indicator of effectiveness. More telling than its staff credentials are its relationships with credible peers within their sector and the foundations that support them.

Successful organizations tend to participate in collaborative partnerships and projects with other known groups, scientific experts, academics, and government agencies. Evidence of this will be mentioned in their press releases and program work; sponsors will likely be listed on their website. Donors may also wish to call a peer charity and ask for their opinion about



Leanne and Teddy, a white boxer she adopted in 2017

the organization in question. Lack of collaboration with peers or less than positive reviews from other charities or experts is certainly a red flag.

When it comes to efficiencies and red flags, donors and charity rating services often assess efficiency based on the allocation of the organization's funds to program and administration costs. Those details can easily be viewed online in Canada Revenue Agency's Listing of Charities.

Merely meeting an established financial benchmark does not mean that the organization is effective, however. Donors may wish to review an organization's strategic plan or the outcomes of past and current programs and campaigns to see if they have achieved objectives that resulted in positive and measurable change.

As you can imagine, there are many aspects to consider. The amount of research you conduct will likely be commensurate with the size of your donation. My **PREP** framework provides a systematic but flexible approach to making informed judgments about organizations.

If donors combine their research of some or all four pillars of the **PREP** framework, they should garner enough information to ensure that they focus their legacy gifts on capable, fiscally responsible, and effective organizations with philosophies that align with their own values. ▲

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