

GrantStream Quarterly

Sharing knowledge, insights and experience

From the editor

this issue

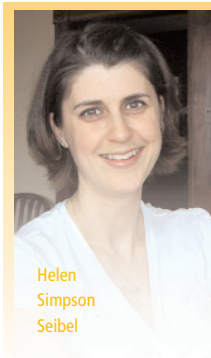
The "how-to's"
of keeping your
CI program vibrant.



Recent
upgrades and
new features
for GrantRight®
& MatchRight®



Canadian
expectations:
stats from the
2006 CSR Monitor



Helen
Simpson
Seibel

WELCOME BACK! Hopefully you all enjoyed your summer and spent some time outside at a lake, on a boat, in the mountains or just out of the office. I hauled my 16 month old daughter around Hungary and Germany — not exactly relaxing but we did manage to soak in a few hot springs, visit some really old places and eat a fair amount of schnitzel.

While I was away, our translator was very busy. The result: www.grantstream.com is now bilingual. As a national company, we feel it's an important complement to our fully bilingual client support team. Just follow the "français" link in the top right-hand corner of each page and please, let us know what you think.

We've packed a lot of information into this issue. Our technology section highlights some of the new product upgrades and features designed to make your job a bit easier. An article on keeping your CI program vibrant asks you to pause and reflect: is your program exciting or is it showing its age?

We have a few revitalization ideas. So take a break and enjoy the read. □

Helen

For the number lovers...

The CSR Monitor is a syndicated annual survey on what Canadians think about the role of companies in society. I like to think of it as the temperature gauge for corporate citizenship in Canada. And it shows that all the work you do in your CI programs, is being recognized. Here are a few stats from the 2006 survey.

- **90%** of corporate employees agree that CSR increases their motivation and loyalty
- **65%** of Canadians surveyed agree that companies are generous with their support of charities and their communities
- **More than 1/4** of Canadians surveyed believe that working to solve a specific problem is the best way a company can contribute to society

For more information on the survey, visit www.globescan.com or contact Chris Coulter directly at 416-969-3088.

Green Tips

Mulch.

Did you know it's both a verb and a noun?

It's also a great excuse for doing less work in the garden.

Leave those grass clippings where they fall. Rake those leaves onto your flower beds.

They will keep your garden moist and help protect against heat, cold and wind.

Just relax and let nature do the rest of the work.

Recent upgrades and new features for GrantRight® & MatchRight®

AS YOU KNOW, MATTHEW STUBBORNLY REFUSES TO move away from Montreal, but travels frequently across Canada to meet with our clients. Even though we don't often see him in person at the Oakville office, we hear from him constantly — either phoning quickly from a client's office to check on a detail; hurrying a last question in before the “fasten seatbelt” light goes on; or contacting us just as we're about to leave the office with his I-know-it's-closing-time-in-Toronto-but-I-just-had-an-epiphany-about-how-we-can-improve-

GrantRight® call. All these conversations — between Matthew, our clients and our development and support team — contribute to our goal of continually improving GrantStream products.

Often the tweaks we make are in the background, invisible to the user but designed to improve performance. Other changes we hope you will notice and make use of. Here are a few recent upgrades and new features available. Some you may have already noticed; some are being rolled out later this year. □

Upgrades

SUMMARY PAGE FOR GRANTRIGHT®

A one-page snapshot of your company's investment activities

This page provides a quick update of the status of your company's investments — a snapshot of the year on one page. How many applications have been received? What's pending? What's unpaid? How much is committed?

The summary page will be rolled out to all clients at **no charge**. Contact [Monique](#) for more details.

“QUICKSEARCH” FOR GRANTRIGHT®

Find a request in seconds

Matthew's favourite upgrade: Rather than having to go to the search page every time you want to find a request, simply enter either the reference number or the name of the organization into a search field at the top of your screen. Hit enter and see the results.

The “QuickSearch” feature is being rolled out to all clients at **no charge**. Contact [Monique](#) for more details.

INVALID CRA FLAG FOR GRANTRIGHT®

One glance tells you if you need to look further

GrantRight® can automatically flag applications with incorrect CRA numbers. For clients that require confirmation of CRA-registered charitable status, this is a real help. A tiny red question mark in the applicant list makes it much easier for you to identify applications that require a bit of upfront investigation to verify accuracy.

The Invalid CRA Flag can be implemented at **no charge**. Contact [Monique](#) for more details.

ENHANCED ORGANIZATION SEARCH FOR MATCHRIGHT® APPLICANTS

Easier for your employees

MatchRight®'s new live organization search makes it easy for employees to find and enter valid information. Drawn from data in your system and from the CRA database, it keeps your data consistent and, as our developers here like to say, clean! It also removes one more step from the process, making the employee experience that much easier.

The new live organization search will be rolled out to clients at **no charge**. Contact [Monique](#) for more details.

- RECENT UPGRADES AND NEW FEATURES FOR GRANTRIGHT® & MATCHRIGHT® continued

New Features Available

DYNAMIC EXCLUSIONARY CRITERIA

Making it even easier to manage donations and sponsorships with one system

While *GrantRight*® has always had the capability to allow companies to automatically flag exclusionary (and inclusionary) criteria, this feature has been significantly enhanced. Different funds, different regions, different programs, donation vs. sponsorship: these may all require different sets of eligibility criteria. The system can now be set up to discern the subtleties.

If you need different criteria in different situations, contact [Matthew](#) to learn more and get an estimate for implementation.

MANAGING MULTIPLE APPLICATION FORMS

One size doesn't necessarily fit all

As our clients customize their community investment programs, so too must we customize the way in which applicants make requests. A single application may not work for all the funds or programs you have developed. Perhaps requests from the field need to be processed differently. *GrantRight*® can support extremely dynamic forms or even multiple applications forms that all feed into the same review interface. It's seamless to the applicant and clearly identified for the reviewer.

If you think you need your current application form adapted or even need to add another, contact [Matthew](#) to learn more and get an estimate for development.

Save the Date

Imagine Canada will announce the winners of its Business & Community Partnership Awards on **February 7, 2006** at the Fairmont Royal York in Toronto. You heard it here first.

Lost that lovin' feeling? How to keep your CI program vibrant

SEVERAL YEARS AGO, I MANAGED A COMMUNITY investment program that was very cool. An online awards program that encouraged nonprofits to submit their ideas for using internet technology to further their cause. The program originated in a business unit before being adopted by corporate marketing and falling under my management. I loved the program. But it just wasn't getting that **"wow, that's fantastic"** response from others. After some objective reflection, I realized the program had great bones but needed a bit more life.

If you manage a community investment (CI) program, you probably know what I'm talking about. After a few years, programs start to show their age. As managers, we get lost in the day to day tasks of programs we love and forget to step back

and reassess. A vibrant CI program gets people's attention. Your employees want to be part of it. It's the human face of your brand, an opportunity for your company to make a difference in the community. But like anything, if left on the shelf for too long, it will go stale. And it's hard to get excited when something loses its crunch.

Consider the consistently high expectations that Canadians continue to have when it comes to corporate citizenship. Globescan's 2006 CSR Monitor found almost 80% of Canadians they surveyed expect large companies to be socially responsible. Yet 55% of Canadians aren't seeing a response from the companies. This isn't a reprimand. It's a reminder. There is an opportunity here for companies to stand up and show leadership.

• HOW TO KEEP YOUR CI PROGRAM VIBRANT continued

Revitalize your CI program and stay current.

In 2005, **Bell Canada** unveiled their *Connected to Communities* program at The Economic Club of Toronto with a speech delivered by BCE President and CEO, Michael Sabia. The program has a clear focus on enabling children and youth to reach their full potential, as well as support for Community Economic Development and significant new funding commitments. With *Connected to Communities*, **Bell** presents us with a current and updated program. It speaks to projects they have funded and supported for years, like Kids Help Phone. It reinforces the strength of their program and their commitment.

Making sure they had a strong program that was strategically aligned, focused and engaging led **The Beer Store** to revitalize their program. It had become more challenging to describe what they supported and why. And it was getting difficult to find champions at the store level. “Corporate makes those decisions” was a typical response to inquiries from the community and employees.

The Beer Store needed a clear program with consistent messaging that their 441 stores and 5,600+ employees could get behind and own. GrantStream worked with them to review what they were doing and talk to people across the company. This discovery process gained internal buy-in and shone a light on the importance of localizing the program in their stores and leveraging their consumer participation. Today, **The Beer Store** employees celebrate their program. The company has retired the “mile wide, inch deep” approach to CI. They know what they support and

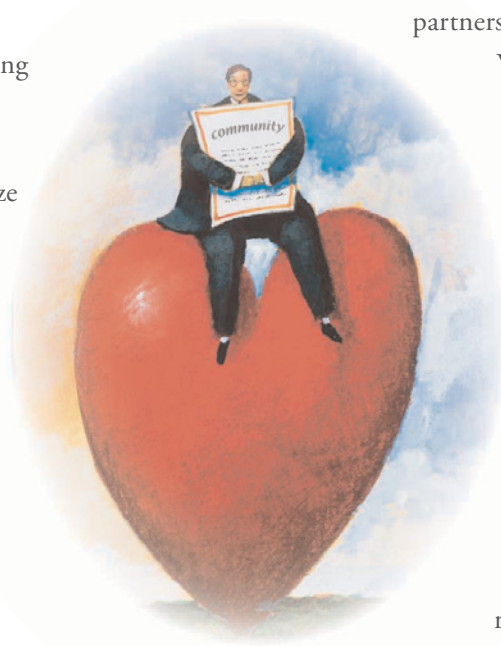
what they don’t support. And they can speak about their commitments with confidence.

Quick Fix or Fundamental Change? It really depends. Maybe you need to reconsider your communications. Or maybe you need some strategic thinking around a change of business direction. Ask yourself a few questions: Do your employees know about your program? Are they engaged and excited by it? What is it doing for your company? Are you making a difference in the community? Is your program designed to let you easily measure and evaluate your impact? Take some time to talk to your colleagues and community partners as well to see what they think.

We ask these same questions and many more when we’re working with clients to restructure and invigorate their community investment programs. They are questions I asked about my community awards program many years ago. It took a year of hard work. We adjusted our strategy, added an employee component and engaged the skills and expertise of our research and development labs.

The core concept of a cool awards program for nonprofits remained, but we’d given the program life. Soon, I wasn’t the only one who could speak about it with genuine passion. Our exposure was international; we reached thousands of nonprofits; our employees were on the ground, working to help our community partners. We captured the humanity of our company and it excited everyone who saw it.

If your community investment program has lost that lovin’ feeling and needs some rejuvenation, call [Richard](#) or [Helen](#) today. □



Great new corporate citizenship courses from Boston College

The Boston College Center for Corporate Citizenship is in the process of reviewing their executive education certificate program. If you look at their course list, you'll see lots of new options. In fact, you may wonder where some of their mainstay courses, like *The Institute*, have gone. It's been renamed and refreshed. Still a core part of their curriculum and a mandatory course for their certificate program, it's called *Developing a Strategic Corporate Community Involvement Program*. The course delivers a comprehensive overview of corporate citizenship and a step-by-step framework for making it happen. Other courses, like *Building and Branding a Breakthrough Signature Program*, taught by our very own Richard Pringle in partnership with Eric Young of E.Y.E., are developed in response to the changing needs of CI professionals and their varying degree of experience in the field of corporate citizenship. See below for dates or visit www.bcccc.net to learn more.

Developing a Strategic Corporate Community Involvement Program

December 6-8, 2006; Miami, Florida
February 7-9, 2007; San Diego, California
May 9-11, 2007; Toronto, Ontario

Building and Branding a Breakthrough Signature Program

November 8-10, 2006; San Antonio, Texas
May 9-11, 2007; Toronto, Ontario



Monique Belzile

The Inside Scoop

Monique Belzile is Manager of Client Services here at GrantStream. Our client service group is the linchpin of our operations — that critical liaison between our technical team and you. Monique coordinates

company set-ups and customized services, conducts online training and provides support for each and every one of you who emails or calls with a question. Parlez vous français? Pas de problème. French was the language spoken in the Belzile family household.

Monique's bilingualism has been central to her career. Before Monique joined the world of community investment, she worked in the travel industry as a sales coordinator. Making sure all her clients had the "trip of a

lifetime" was her goal. This required some serious attention to detail and a keen ability to multi-task (skills that continue to be invaluable at GrantStream). Every vacation package she worked on and every country she visited further fueled her passion for travel.

Monique likes to visit one new place every year — adding another pin to that giant world map hanging on her wall at home. But if you're wondering where she's going this year, it isn't far. She's just bought a new house. Instead of a passport, she has a three-ring "house" binder, complete with paint chips, flooring, tile samples and notes on indexed and tabbed pages for each room (did I mention she was organized?). Nevertheless, I'm sure the trip is back on for 2007; I heard her say something about a safari a few days ago. □



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& how:

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