

Corporate Profile

▼ THE AVR PARTNERSHIP AT A GLANCE

The Arlett van Rotterdam Partnership specializes in services for the Philanthropic Sector. The Partnership is founded on over 50 years of experience of the two partners.

▼ EXPERTISE

In the not-for-profit sector:

Charitable Non-Profit Organizations

Foundations and Corporate Giving Programs

Trade Associations

▼ SERVICES

Fundraising Planning and Feasibility Studies, Performance Assessments and Strategic Direction Development, Program Reviews, Strategic Planning, Research, Constituency Development, Marketing and Communications, Board Development, Staff and Volunteer Training, Ongoing Strategic Consultation.

▼ THE PARTNERS

Allan Arlett

Ingrid van Rotterdam

Over 50 years experience in the not-for-profit sector in Canada, USA, Europe and other countries as Chief Staff Officers of national organizations, managers and professional volunteers on both the granting and requesting sides of the not-for-profit sector.

Linked to a network of consultants to the sector.

Associate: C. Arthur Bond

One of Canada's leading authorities on charitable tax law, finances and foundations. For over two decades head of The Physicians' Services Incorporated Foundation and the Association of Canadian Foundations.

▼ SAMPLE TRAINING PROGRAMS

AvR training programs may take from 2 hours to 3 days and may be customized to meet the very specific needs of individual clients.

Following is a sample of the training programs AvR has developed in response to client requests.

- ?? The Cycle of Partnership Development, the Fundraising Cycle
- ?? Boards and Fundraising
- ?? Solicitation Principles and Techniques
- ?? Fundraising Collaboration
- ?? Evaluating your Development Efforts
- ?? Diversifying your Funding Base
- ?? Introduction to Fundraising Methods and Their Uses
- ?? Building Foundation Partnerships
- ?? Approaching Corporations for Support
- ?? Preparing Powerful Proposals
- ?? Preparing for a Fundraising Campaign

▼ CLIENTS AND EXPERIENCE

Listing of organizations with whom the partners have worked during their careers. An asterisk (*) identifies relationships prior to the establishment of AvR. We encourage organizations to call any of our past clients for information and references about our work.

Charitable and Non-Profit Organizations

Albert College
Anglican Houses
Big Brothers and Sisters of Canada
Big Brothers and Sisters of Ontario
Branksome Hall
* Canadian Association for Community Living
* Canadian Booksellers Association
* Canadian Centre for Philanthropy
Canadian Friends of Nelson Mandela Children's Fund
Canadian MedicAlert Foundation
Canadian Physician's for Aid and Relief
Canadian Retail Hardware Association
* Clarkson University (New York)
College of Family Physicians of Canada
Crescent School
Hillfield Strathallan College
Holy Trinity School
Interval House
INNOTECH Philippines
* Lakefield College School
* Laurentian University
Learning Disabilities Association of Ontario
Michener Institute for Applied Health Sciences
Network - Interaction for Conflict Resolution
Nipissing University
* Ontario Alzheimer's Association
Ontario Association of Art Galleries
Ontario Association of Children's Mental Health Centres
Ontario Association of Indian Friendship Centres
* Ontario College of Art
Ontario Medical Association
* Ontario Science Centre

* Queens College (New York)
* Roy Thompson Hall
Royal St. George's College
St. Mildred's – Lightbourn School
St. Stephen's Community House
Society for Manitobans with Disabilities
Speech Foundation of Ontario
Sterling Hall School
* The Study School
* University of Sudbury
* University of Toronto
Variety - The Children's Charity
Toronto Brigantine Inc.
Women's College Hospital Foundation
Women's Legal Education Action Fund
Women's Legal Education Action Fund Foundation
Wood Green Community Centre
York University Voluntary Sector Management Program

Foundations, Corporations and Government Related Activity

Canadian Heritage
Canadian International Development Agency
* Council On Foundations (Washington DC)
* Donner Canadian Foundation
Fortis Education Foundation
Halifax G-7 Summit
Health Canada
Japan Centre for International Exchange
Levi Strauss Canada
Mennonite Credit Union of Kitchener-Waterloo
Ontario Anti-Racism Secretariat
Samuel and Saidye Bronfman Family Foundation
Scarborough Board of Education
* Trillium Foundation
T.R. Meighen Foundation
Price Waterhouse

▼ THE AVR PARTNERSHIP PHILOSOPHY

The Arlett van Rotterdam Partnership has a very specific approach to its work with clients. AvR has determined that it will remain a small firm involving the two partners in working directly and personally with each client. In this way, the AvR partners are fully responsible and accountable for the quality of service our clients have a right to expect.

To allow it to operate in this way the AvR Partnership only takes on a limited number of clients at any one time. As a result we accept work with clients where we can apply the special knowledge and strengths of the partners and for programs and projects we find particularly interesting and challenging.

We believe in the importance of organizations strengthening their own capacity. Therefore, we are committed to a partnership with our clients, to develop and enhance their own abilities. This involves application of the organizational development and process facilitation expertise we have developed through first hand experience in heading up national organizations. AvR is committed to working with organizations to put in place activities that will strengthen their capacity to provide effective service and generate funds. For this reason the firm does not provide full-time on-site management of fundraising campaigns or other activities. We will, however, assist organizations to contract staffing where this is needed. We enjoy working closely with clients providing strategic counsel when needed, after the conclusion of a particular project we may have worked on.

Our own experience and research in the field has identified our partnership approach is the most effective means of helping organizations benefit most in working with consultants. For us it is also the most rewarding experience. With the client's participation we work to put in place a process that will involve the key leaders and volunteers of the organization as active participants in the consultation process. This increases the organization's learning, level of comfort and confidence and subsequent buy-in and commitment to recommendations and activities from the consultation. Discussions with our current and past clients will affirm our "partnership" approach.

The AvR principals have a long-standing professional relationship with two individuals - specialists in business development, re-engineering, and charitable tax law. The special expertise of these individuals is made available to clients when appropriate and only with advance discussion and agreement by the client.

▼ ALLAN ARLETT

Allan began his career in fundraising and charitable non-profit management at the University of Toronto in 1964. He served as a staff member to educational institutions in Canada and the United States from 1964 to 1977. The fundraising program he directed at Clarkson University, (New York) received the top award among North American Colleges and universities three times -the prestigious United States Steel Foundation Award, as well as its Grand Award for sustained performance. As Director of the Alumni Relations and Development at Queens College of the City University of New York the program received the top award in alumni administration. He was a North American leader in developing revenue-generating programs in the alumni field.

In 1977 Allan returned to Canada to join the Gordon L. Goldie Company Limited as vice-president. In 1979, Allan was instrumental in conceiving and establishing the Canadian Centre for Philanthropy (CCP) and was its chief staff officer from 1980-1990. CCP is a registered charitable organization with a mandate to broaden the base of volunteer and financial support of charitable activity in Canada. Under Allan's leadership, CCP developed an associate membership of over 1,400 organizations. He also played a primary role in the conception and development of the nation-wide IMAGINE public awareness campaign.

The Canadian Centre for Philanthropy established the Allan Arlett Award for Excellence in Philanthropic Research in recognition of his contribution to the field.

After ten years at CCP, Allan became President of Navion Inc., a national fundraising consulting firm, which he then linked with firms in five other countries through the Downes/Ryan Group. At Navion he consulted with universities, hospitals, social service, international and cultural organizations. In 1993 Allan was contracted as Senior Advisor to the Major Gifts Program at the University of Toronto.

Allan established The Arlett van Rotterdam Partnership (AvR) with Ingrid van Rotterdam in 1994. The enclosed material describes the expertise and work record of AvR.

Allan is widely published in the field of philanthropy and has been involved as a speaker and consultant in international programs at home and abroad, including the Philippines, Mexico, Hong Kong, Germany, Eastern Europe, England and the United States.

Among his many volunteer activities, Allan served for six years as a member of the Executive Committee of the Trillium Foundation (one of Canada's largest) and as the first Chair of its Policy Committee. He was one of three external advisors to the 1990 Auditor General's review of Revenue Canada's Charities Section and a member of the Advisory Committee to the Ontario Law Reform Commission on the law of charities. He was on the Board of the Toronto Chapter of the National Society of Fund Raising Executives and was Chair of its First Annual Fundraising Congress. Allan has been involved as a faculty member of CASE summer institutes regional and special conferences and seminars. He was a member of the faculty of the York University Summer Institute for Non-Profit Management and Leadership. He is an Honorary Director of CCP and is a former member of the Honorary Advisory Committee of the Trillium Foundation. He is a member of Georgian College's Fundraising Resource Development Advisory Committee.

Allan holds an undergraduate Economics degree from the University of London, England.

“One of the first Canadians to devote his entire career first to fundraising and latterly to the gathering and disseminating of information on philanthropy is Allan Arlett of Toronto.... Although the field is rapidly becoming crowded with players, Arlett must be regarded as the coach of professional and volunteer fund-raisers in this country.” (Martin, Samuel, An Essential Grace. Funding Canada's Health Care, Education, Welfare, Religion and Culture, McClelland and Stewart, 1985.)

▼ INGRID VAN ROTTERDAM

Ingrid started her career in the not-for-profit sector in 1980. She has held senior positions in the sector including serving as Executive Director for the Canadian Booksellers Association (CBA), Director of Regional Grants for the Trillium Foundation and Director of Information Services for the Canadian Centre for Philanthropy (CCP) and contractual work for the Donner Canadian Foundation and Levi-Strauss Canada.

In 1994 Ingrid established The Arlett van Rotterdam Partnership (AvR) with Allan Arlett. The enclosed material describes the expertise and work record of AvR. As one of two partners in (AvR) Ingrid is involved in providing fundraising counsel to each of the firm's clients. Organizations the firm has served include those in the fields of education, health, international development, social services, and grantmakers.

Ingrid's experience in organizational development includes financial, policy and program/product development and human resource structures (Board, volunteer and staff). Ingrid has significantly strengthened the financial health of organizations, recruited and trained volunteer community leaders, enhanced the political and negotiating influence of organizations, conducted program and organizational analyses, increased media interest/involvement in organizations, published and trained nationally and internationally in the subjects of organizational development and philanthropic activity.

As the Director of Information Services at The Canadian Centre for Philanthropy, Ingrid designed and implemented a wide range of information products, services and training for the Canadian not-for-profit sector. She initiated and electronically documented Canada's largest resource centre for the philanthropic sector. Ingrid developed and implemented fifteen programs and services for the CCP contributing to an 86% increased usage by CCP Associates.

The Trillium Foundation is one of Canada's largest foundations in terms of grants awarded. As Trillium's first Director of Regional Grants Ingrid designed and established a regional volunteer-based structure to deliver a new and community based granting program across the province. Ingrid recruited and trained seventy senior community leaders throughout Ontario to work on Trillium's behalf in their communities. She conducted in-depth program and organizational development analyses of social service organizations and managed millions in Trillium Foundation grants to these organizations. At the Donner Canadian Foundation Ingrid worked with grant-seekers on their programs and fundraising proposals and

administered the peer review process. She was later contracted by Levi Strauss to evaluate programs and organizations seeking support.

The Canadian Booksellers Association is a national trade association of 1,300 members representing the book trade with a mandate to enhance the profitability and professionalism of the industry. As Executive Director Ingrid oversaw all programs and services, focusing on financial development, policy development and advocacy strategies for the Association. Ingrid turned the CBA around from a financially troubled organization on the verge of bankruptcy to a deficit-free organization without eliminating any programs and services, by increasing net profits significantly in all CBA program areas. Under Ingrid's leadership the CBA experienced its two highest annual profits ever.

Ingrid holds a Masters Degree in Library and Information Science from the University of Western Ontario.

▼ PUBLICATIONS

- Arlett, Allan: Canada; International Fundraising for Not-for-Profits; John Wiley and Sons, 1999.
- Arlett, Allan: Foundations; The Canadian Encyclopedia; Hurtig Publishers, 1988 and 1997.
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Van Rotterdam, Ingrid: Guide to Canadian Resources on Public Private Partnerships; Department of Canadian Heritage, Government of Canada, 1996.

Van Rotterdam, Ingrid, ongoing contributor: Canadian Bookseller; Canadian Bookseller's Association, 1990-1993.

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Van Rotterdam, co-editor: Canadian Directory to Foundations; Canadian Centre for Philanthropy, 1984-86.