

## **CORPORATE AND MEDIA SUPPORT 2008–2009**

We would like to give our many heartfelt thanks to our corporate, community and media partners and sponsors. Without their help the Christmas Exchange could not have achieved what we did over the last year.

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## **2008–2009 BOARD**

### **2008-2009 Executive Committee**

David Marin, President  
Rebecca Stanisic, Vice President  
Donna MacGregor, CGA, Treasurer  
Samer Forzley, Secretary  
Bill C.A. Wyman, Past President

### **2008-2009 Board Members**

Ella Forbes-Chilibeck  
Candy Gaudet  
Pete Larocque  
Audrey Lockhart  
Doris Ramphos  
Réjean Saumure

### **Standing Board Members**

City of Ottawa, represented by Michelle Mulligan  
Salvation Army, represented by Kristine Farnel

### **Executive Director**

Marilyn Matheson, CAE

### **2008 Campaign Chair**

Adrian Harewood

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recruiting and coordinating volunteers to help pick up and deliver toys to the clients. The response to our call for volunteers was tremendous and we would like thank those volunteers who generously gave of their time to help with toy deliveries.

Last but not least, the Christmas Exchange would like to thank John Nelms who came to the Exchange’s rescue when we couldn’t find someone to manage the centralized database. John volunteered his time to look after the centralized database and coordinate the incoming referrals from the 348 referring agencies making sure all the referrals were entered accordingly into the database and checking for duplicate referrals.

Volunteers at the Christmas Exchange come from all walks of life, some having recently retired looking to keep busy, and some who wanted give back to the community. We also had students volunteer as part of their 40 hours community service. There were also companies who had employee volunteer programs in place which gave their employees the opportunity to volunteer for a day with an organization. Wherever the volunteers came from, they all had one goal in mind, they wanted to help out with whatever and wherever they can so that those less fortunate will have a better Christmas.

With this mind, I want to take this opportunity to thank all the volunteers who have supported and assisted the Christmas Exchange in one way or another over the past year. You have made a difference in the lives of many people within the Ottawa community. For that, we thank you.

## VOLUNTEER REPORT

*Submitted by Sui-Ling Leung, Director of Development and Volunteer Services*

Volunteers are the life force behind the Christmas Exchange in carrying out its mission of helping those who are verifiably in a time of need during the Christmas holiday season. In 2008, over 250 volunteers contributed more than 2,200 hours of volunteer service to the Exchange. The service that the volunteers provide is invaluable as we would not be able to carry out our fundraising and deliver our food or Central Database programs without their assistance.

Volunteers helped with stuffing envelopes for the donor mailings as well as over 7,800 redeemable food vouchers that were mailed to clients. We also had volunteers that helped with data entry of the thousands of referrals into the centralized database as well as making phone calls to confirm toy pick-up appointments at the Salvation Army Toy Centre. There was no shortage of help for the hamper deliveries as we had over 100 volunteers, many of whom had participated in previous years, as well as new volunteers pack and deliver the food hampers.

We are also grateful for the many volunteers who came and supported us at our many fundraising events throughout the year. We rely heavily on volunteers to make the annual *Running on Empties* a success. With 21 Beer Stores across the city, and a minimum of 4 volunteers needed per store, this required close to 90 volunteers to help with the empty beer and wine bottle collections

which takes place outdoors and often on a very cold wintery day. My sincere thanks to those volunteers and the many service clubs who helped us by adopting a Beer Store and providing their own volunteers to manage the collections for that day. Special thanks goes to Kiwanis Club of Nepean, Kiwanis Club of Ottawa-Vanier, National Capital Kin Club, Rotary Club of Ottawa Bytown, Rotary Club of South Nepean, Kiwanis Club of Kanata, Rotary Club of West Ottawa, Rotary Club of Ottawa, and the Rotary Club of Ottawa-Stittsville.



*Jacquelin Holzman with volunteers Jeremy and Jen.*

My thanks also to the volunteers for our *Pennies for Portions* program who helped pick up heavy containers of coins from the schools or wrapped the coins into rollers. Thanks again this year to Ottawa-Carleton Lifeskills Inc., Tamir, and Park Place Retirement Residence for assisting with the wrapping of the coins.

One thing that was unexpected and which affected many of the clients who were referred to the Salvation Army Toy Centre for toys was the OC Transpo transit strike. As many of the clients could not pick up their toys without bus transportation, the Christmas Exchange took on the additional task of

## PRESIDENT'S REPORT

*Submitted by David Martin*

There will be no doubt that 2008–2009 was a tough year. The OC-Transpo strike resulted in many not being able to get to work. What was finally acknowledged as a recession became reflected in higher layoff rates, with more persons seeking assistance and fewer able to provide it.

Direct mail donations were down \$40k. These are the “backbone” of our financial support. Third-party functions were down \$18k. While some other sources increased, overall revenues decreased by \$27k. At the same time the level of assistance provided almost equaled that of last year, but other expenses increased. The end result was that we expended some \$37k more than we received, more than offsetting the fund balance of a year ago. This organization cannot sustain another “hit” of that magnitude.

On the positive side we were able to address the needs of all referred to us to some degree. The assistance to the Toy Centre appeared to function well. Improvements to the database function were carried out. The *Caring and Sharing Auction* shared with The Huntington Society proved to be a success even in its first year.

The Board was shocked and saddened at the passing of our Treasurer, Donna MacGregor. Donna was particularly helpful in this role. Audrey Lockhart also resigned as she was moving to Toronto. With the new Board, Bill Wyman will be retiring after nine years of faithful services, including years as President and Past President. Réjean Saumure will also be resigning to pursue other interests. Rej was particularly helpful as Chair of Fundraising and as a spokesperson for the organization. They will all be very much missed.

In closing, on behalf of the Board, and particularly as this will be my last report as President, I would like to express our appreciation for the tremendous support given to this organization by our Campaign Chair, Adrian Harewood, our Patrons, our sponsors, our staff, our volunteers, the many teachers and others who have run third-party events, our partner organizations, and especially our donors. All of these efforts brought help to many in need. Their future participation will be crucial to our continued success.

David Martin  
President

## EXECUTIVE DIRECTOR'S REPORT

*Submitted by Marilyn Matheson*

This past year was one of the most difficult ones I have known at Christmas Exchange. Not just difficult for the organization, but difficult for the families; the men, women and children we help.

Every one has their own personal story as to how they found themselves in a time of need: layoffs; illness; death of the household bread winner; one partner deserting the other leaving nothing but debt behind.

These are real people with real stories. People like \*Don who wrote us to say

*"Last year I made a donation to the Christmas Exchange. I never thought I'd have to ask for help this year but I lost my job in November. I wouldn't have asked but I didn't want to let my kids down".*

We also heard from Mark, whose wife is currently on disability due to illness, making it necessary for him to quit work and stay home and take care of his wife and young daughter. Mark wrote in his thank you note:

*"You can tell [the donors] that [the food voucher] made this Ottawa family feel very lucky and it also gave a little girl the Christmas she deserves."*

Poverty does not care what a person's background or education level is, as we know from Anne who has a Master's Degree, and George who also has two university degrees. In both their cases they lost their job after years of working; in Anne's case because of an accident; and in George's case because of illness. Both had contract employment with no benefits, so their life savings had to be used before receiving pensions from the Ontario Disability Support Program (ODSP).

In her thank you note Anne highlighted how much she appreciated receiving a voucher, rather than a food hamper, since her family are vegetarians. The food voucher allowed her to purchase the food suitable to their dietary needs.

Although it was a difficult year, our team of volunteers and staff worked hard to make the Christmas season a little brighter for over 25,000 people. My sincere thanks to all those who helped make it happen, with special thanks to:

**Sui-Ling Leung** who has been with us for two Christmas seasons as our Fundraiser. We were fortunate enough to receive a grant allowing Sui-Ling to further her fundraising studies at Algonquin College. I am happy to report that since her successful completion of her Fundraising Certificate, she is now our Director of Development and Volunteer Services.

*\* The stories are real, but to protect the privacy of our clients the names have been changed.*



*Teacher Judy Beddoes and Campaign Chair Adrian Harwood help pack hampers..*



*Full hampers wait to be delivered*

## PROGRAM REPORT

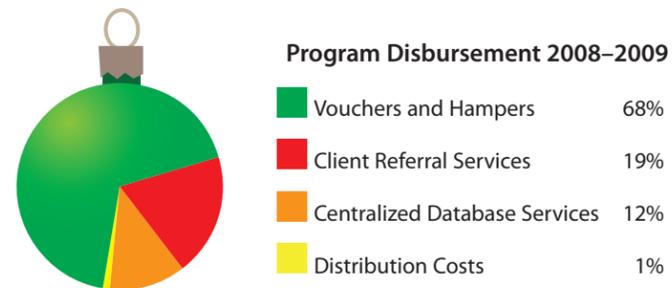
Submitted by Catherine Latham, Chair, Program Committee

Although 2008 was a challenging year in fundraising and there were many pressures, it was successful for the Christmas Exchange programs in that **everyone who applied for assistance received assistance**. Over 9,200 families (25,180 people) received food assistance, including 11,287 children and 2,198 seniors. In addition almost 12,000 children were referred to the Salvation Army Toy Centre.

A survey of the agencies that also provide food assistance during the holiday season showed that the average amount given to each household was \$100 in 2008. Therefore the amount saved in food assistance by the identification of 2,357 duplicates was \$235,700. The amount saved in toy assistance, thanks again to the duplicate check, was \$467,400. The overall savings to the community provided by the Christmas Exchange Centralized Database Program which makes the duplication checks possible was in excess of \$700,000.

When taking into consideration the cost of operating the Christmas Exchange Centralized Database, which was 12% of the overall program disbursement, the ratio of expenses to savings in 2008 was 1:15, or for every \$1 spent, \$15 was saved in the community, allowing the donations from the public to go considerably further.

The savings of an estimated \$728,775 in the finding of duplicates for food and toys has once again proven the importance and value of the centralized database.



### Hampers

Once again this year the hampers were packed at the Joan of Arc Academy. Although the school was closed at the time, several grade 8 students took time from their Christmas vacation, along with their teacher Judy Beddoes, to set up the boxes and pack hampers.

**Susan Hopkinson**, of JanSu Communication who works on contract as our Director of Finance. Besides handling our finances, Susan provides direct supervision to the database manager position.

Christmas Exchange is not the only contract Susan has, and we very much appreciate her scheduling around our needs during the busy season.

**John Nelms**, Referral Database Manager, who volunteered his services, helping to save us money in a difficult year. John was at the office every day, evening, and most weekends to ensure that all the names of the families in need were entered into the system, and the duplicate checks done on time. He even had his wife Lucy doing data entry.

**Jill Thursby**, our summer student who was a tremendous help in obtaining auction items for the first annual Caring and Sharing Charity Auction held in September.

**Roberta Noviks** our fall co-op student from Ottawa University who was with us from September until shortly before Christmas helping out with whatever needed to get done.

A big THANK YOU once again this year to **Paul Barbeau**, President and CTO of hyperNET. With the bus strike during the Christmas season, Paul ensured the Centralized Database was in tune with the changes at the Toy Centre when volunteers were called on to pick up and deliver toys.

A big thanks also to **Ed Stevens** from RPM Creative who for many years has been our web master, ensuring our website is updated in a timely fashion. These days an organization's website is their public face and we could not have managed the website without Ed.

Marilyn Matheson, CAE

Executive Director

## FUNDRAISING REPORT

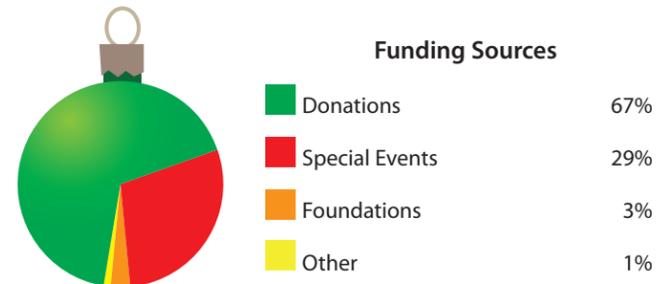
Submitted by Réjean Saumure, Chair, Fundraising Committee

In the fall of 2008 with the United States heading into a recession and Canada and the global community following suit, it was a difficult time for everyone affected by the economic instability and job losses. This helped make 2008 a challenging year for fundraising for Christmas Exchange, while increasing the number of families in need.

Revenue from the direct mail campaigns were down from previous year by 27%, although the on-line donations increased 45%, general donations increased 30%, and corporate donations increased 15%. This resulted in an overall decrease in donation revenue of 6%.

The increase in general and on-line donations could be due in part to the emergency appeal made to the general public two weeks prior to Christmas for an additional \$55,000 to help keep up with the increased demand for assistance. Thanks to the generosity of people within our community, we were able to raise enough to ensure that all those who applied were able to receive assistance.

As shown in the chart below, the largest source of revenue for the Exchange was from donations which accounted for 67% of overall revenue. This is followed by special events at 29%, which is consistent with the previous year.



For the second year an advertorial and envelope distribution was done through the Ottawa Citizen to generate awareness for the Exchange and to acquire new donors. This once again proved to be quite successful and the Christmas Exchange will be repeating this again in 2009.

### 2008 Events

Events in 2008 included *Christmas in July*, *Ottawa's Biggest Bake Sale*, *Running on Empties*, *Pennies for Portions*, and the *Trees of Hope*, all of which have been run before. A new event, *The Caring and Sharing Charity Auction* was added this year as a joint fundraiser with The Huntington Society.

#### Christmas in July

The Third Annual *Christmas in July* presented by Enbridge Gas Distribution Inc. took place once again at the Fallowfield Transit Station on July 17. The early morning breakfast BBQ was a

#### Standing Members

City of Ottawa, represented by Michelle Mulligan

Salvation Army, represented by Kristine Farnel

#### Executive Committee

President: Rebecca Stanisic

Vice President: Pete Larocque

Treasurer: François Thivierge

Secretary: Samer Forzley

Past President: David Martin

## NOMINATIONS REPORT

*Submitted by William Wyman, Past President and Chair of Nominations*

As this is my final year on the board of Christmas Exchange, I wish to thank all the board members I have had the privilege of working with over the past years. Thanks also to the members of the Nominations Committee this year; Pete Larocque and Samer Forzley for their help in reviewing resumes and meeting with potential candidates to the board.

Thanks are due to the following, who are leaving our Board this year:

**Réjean Saumure**, who joined us in 2006 and who has been a valuable member of the Board and of the Fundraising Committee. His help with the first *Annual Caring and Sharing Charity Auction* was invaluable. As well, he leaves us with lots of ideas for other fundraising projects.

**Audrey Lockhart**, who came to Ottawa from Fredericton, where she was very involved with the Fredericton Community Service Inc. Her experience was very useful in helping us establish Board policy around our programs. Unfortunately for us, she has moved out of Ottawa.

**Donna MacGregor**, who sadly passed away this year. She acted as our Treasurer and was always there for our fundraising projects. Often with her husband Dale, she took part in the arrival of Thomas the Tank Engine, *Ottawa's Biggest Bake Sale* and *Running on Empties*. We will miss her enthusiasm and our thanks and condolences go to her family.

**Bill Wyman**, what can I say? I have enjoyed many years on the Board and know that I leave it in better hands.

I respectfully submit the following names for election to the 2009-2010 Board of Directors and Executive Committee:

### Terms Expiring in 2010

Samer Forzley Ella Forbes-Chilibeck  
Candy Gaudet

### Terms Expiring in 2011

Doris Ramphos

### Terms Expiring in 2012

Roy A. Anderson Thom Bourne  
Helen Byon Pete Larocque  
Mark B. Lindsay David Martin  
Rebecca Stanisic François Thivierge

success raising over \$4,000 which included a matching donation of \$1,000 from Scotiabank (Woodroffe & Stoneway, Barrhaven). Among the various local city councillors and VIPs who helped serve breakfast and collect donations were Pierre Poilievre, MP, Mayor Larry O'Brien, Councillors Jan Harder, Steve Desroches, Maria McRae, CTV Max Keeping, Jacquelin Holzman, Ottawa Citizen Publisher Jim Orban, Santa and Rudolph. Special thanks goes out to a new sponsor Mattamy Homes who also provided volunteers, the Ottawa Citizen, Ross' Your Independent Grocer, Starbucks Coffee (Woodroffe/Strandherd), and OC Transpo.



*Santa, Rudolph and friend.*

### Caring and Sharing Charity Auction

This new fun-filled event was held on September 25 at the Hellenic Meeting & Reception Centre, as a joint fundraiser with The Huntington Society. The dinner with live and silent auction hosted by Honourary Chair, Max Keeping with auctioneers Sandra, Carter and the Boyle from 105.3 KISS FM, raised close to \$33,000. Thanks to District Realty Corporation for being a Presenting Sponsor of this event along with other sponsors, BrazeauSeller LLP, Tannis Food Distributors, Ottawa Citizen and 105.3 KISS FM.



*2008 Campaign Chair Adrian Harewood and the Honourable Jim Watson*

With the success of this event, the Second Annual *Caring and Sharing Charity Auction* will be held on September 29 at the Hellenic Meeting & Reception Centre with Honourary Chair, Senator Mike Duffy and celebrity auctioneer Dave Smith.

### Ottawa's Biggest Bake Sale

The Eighth *Ottawa's Biggest Bake Sale* was held on October 11 at the Dominion-Chalmers United Church with 6 community groups and 18 bakeries helping to raise close to \$7,000 for the Christmas Exchange and the community.

## TREASURER'S REPORT

Submitted by David Martin, President

Our thanks to Presenting sponsor TD Canada Trust for their support and to Bridgehead for supplying the coffee as well as our media sponsors the Ottawa Citizen and A TV. Special thanks also goes out to the following bakeries who donated baked goods to sell at the event – Aladdin Bakery, Angelic Pastries, Artistic Cake Design, Buttercream Bakery, Chateau Fine Pastry and Bakery, Chelsea Bakery, Maison Baquettes, Isobel & Company, Margo's Homemade Desserts, Morrison's Fudge, Mrs. Beasley's Bake Shop Inc., Ottawa Bagel Shop & Deli, Pasticceria Gelateria Italiana Ltd, Second Avenue Sweets, The Scotchboy Cookie Company, Three Tarts, The Gingerbread Man, Wild Oak Bakery. As well, thank you to the many volunteers who helped at the event and the community groups that participated.

### Pennies for Portions

The annual *Pennies for Portions* invites students from local schools to collect loose change for Christmas Exchange. The kick-off to *Pennies for Portions* was held at Vincent Massey Public School with the students holding a big pajama party. A generous effort by the students from 15 participating schools helped raise a total of over \$4,500, which is down from previous years. Our thanks to the students, staff and teachers from all participating schools.

### Running on Empties

With the support of The Beer Stores in the Ottawa area and the many volunteers who braved the cold day on December 6, the twentieth anniversary of *Running on Empties* was another great success as the event raised close to \$13,000 for food hampers and redeemable food vouchers.

### Trees of Hope

The paper *Trees of Hope* were once again sold through the Loeb stores for \$2.00 which raised a total of \$8,600 for the Exchange.

### Third Party Events

Some of the third party events held in support of Christmas Exchange included *Chocolates for Charity* organized by the Colonel By Retirement Residence and the annual Teddy Bear raffle held by the students of the Public Relations Program at Algonquin College. Hallmark/Davis Agency also helped the Christmas Exchange with its fundraising efforts by once again having the donation boxes at their stores and selling the Christmas Exchange tree pins.

The annual *Christmas Cheer Breakfast and Broadcast* held on December 5 also saw a portion of the proceeds going to the Christmas Exchange.

I would like to thank all those who helped with the Christmas Exchange's fundraising in 2008 and look forward to your continuing support.

I am presenting this report in place of Donna MacGregor, who was our Treasurer from June 2006 until taking ill in March of this year. Prior to her death on May 19, she gave a great deal to this organization and will be missed.

Last year Donna reported that we ended the year with a small excess of revenue over expenditure. However, with the increased number of clients in 2008, coupled with the difficulties experienced in fundraising, the fund balance of \$33,065 going into the year was depleted, leaving a fund deficit of \$3,816. This has left our reserve fund, which should be maintained at \$100,000, at \$96,184.

Revenues were down overall but the expenses to run some of the fundraising events remained the same or increased. As illustrated in the chart below, our Administration expense is 10%, which is much lower than the 20% allowed by the Canada Revenue Agency (CRA).

The Christmas Exchange has a history of running an excess in our disbursement quota on our T3010 Registered Charity Information Return filed with the CRA. Because of this surplus, we were only required to disburse \$295,050 in program expenses. However, we provided \$384,627 in service from our two programs, Food Assistance and the Centralized Database.

