



The Counselling
Foundation of Canada

Looking Ahead:
Highlights from our 2012 Strategic Review

February, 2013

SUMMARY

The Counselling Foundation of Canada (the “Foundation”), a private family foundation funded by Frank G. Lawson and his estate, was established in 1959 to create and enrich counselling programs and improve the technical skills of career counsellors. Over the last fifty-plus years, the Foundation has seeded many innovative programs that have had positive and profound effects, particularly around improved career and educational outcomes for Canadians.

As a privately governed organization, we believe it is incumbent upon us to look at long-term planning horizons to effect meaningful and lasting societal change. We also recognize that our role is not to simply supplement the funding of programs and services supported by government, but to invest our human, intellectual and financial resources with a view of improving societal outcomes through program innovation and shifts in public attitudes & policy. It is a role we take seriously.

In December 2011, the Board of Directors of the Foundation embarked on a strategic planning process to help us clarify our role and define how to most effectively direct our efforts in the coming years. Several factors, both external and internal, made this an opportune time to consider how the Foundation can accomplish its goals, but four in particular bear mention.

The first is the evolving role of the philanthropic sector in providing leadership in advancing innovation in the charitable sector and carving out an increasing role in developing public social policy. As governments at all levels pull back from policy development & program funding, while becoming more risk averse, there is an ever increasing need to focus philanthropic efforts on root causes, social determinants, and upstream drivers that can result in leveraging of funds.

Secondly, technology is continually changing the landscape in which we operate. New technologies are allowing for new voices to emerge, new ways for people & communities to connect & organize themselves, and decreasing timelines to respond to issues. Not only does technology allow for us to respond to needs more quickly, but it also has promoted our ability to measure progress. The philanthropic sector can more nimbly respond to the increased pace of change taking place in our society which allows us to identify and respond to issues in the community more quickly than government.

The third factor is tremendous growth of the Canadian Education & Research Institute for Counselling (CERIC), a charitable organization launched by the Foundation that advances education and research in career counselling and career development. In just under ten years, CERIC has grown from being a collection of ideas and programs to a maturing organization that is providing cutting edge research and innovative programs that are serving Canadians and the career development field.

Finally, with continued sluggishness of the economy and the effect that is having on our endowment funds, we must always be mindful of ensuring our granting investments are delivering maximum returns. The Foundation has historically granted well in excess of the 3.5% annual disbursement quota mandated by CRA. As stewards of an endowment, we wanted to

consider how we balance the needs of society now versus the needs of society in the future, and at what level we can sustainably fund.

To facilitate the process, a Strategic Review Committee was struck to work closely with staff. The Committee regularly engaged the Board for input and feedback. In addition to reviewing the Foundation's work over the last decade and readings about emerging trends in philanthropy, an external facilitator was hired to coordinate the process and engage a number of key industry stakeholders in order to understand how we are perceived externally. These stakeholders included both members of the philanthropic community and current & past grant recipients.

The main findings of this knowledge gathering process were:

- Within the philanthropic sector, the specifics of the Foundation's mission may not be well known, but it is respected within the community of practice and its more recent efforts to support innovation, best practice sharing, and collaboration within the philanthropic community are appreciated.
- Within the career counselling and career development sphere, the Foundation is well known, and stakeholders emphasized the important role the Foundation plays. The Foundation is seen as relationship-oriented, innovative, collaborative, and bold; and stakeholders were appreciative of the Foundation's investment in people with big ideas, loyalty to them over time, and willingness to push them to do more by leveraging their models to help more people. And, they commented on the Foundation's reputation of funding projects and issues that are not "sexy".
- The concept of a career counselling or career development "community" remains very fuzzy, largely because it is highly fragmented, crossing multiple sectors and professions.

The combination of research and findings allowed for a healthy internal discussion and for the Foundation to clarify its mission, vision, values and guiding principles. At its December 2012 meeting, the Board passed a new Strategic Plan, which articulates its renewed focus on the career development sphere, and a reduction in some of the more general social service-related programming that we have supported in the last two decades. These elements are outlined in greater detail on the following pages.

The Foundation continues to believe that the future of the career counselling and career development field is important for the personal development and economic prosperity of Canadians, and that we can be a positive influence in pushing it to the next level. And, we are confident we have a role to play in ensuring all Canadians achieve their potential for the betterment of Canada.

VISION, MISSION, VALUES AND GUIDING PRINCIPLES

Vision:

A day when all Canadians are living purposeful and productive lives, helping to build a better, more prosperous society.

Mission:

The Counselling Foundation of Canada champions learning and career development to help Canadians nurture the gifts and talents within themselves.

Values:

Since Frank G. Lawson created The Counselling Foundation of Canada in 1959, the same core values and beliefs have shaped our efforts and activities.

We believe in the positive impact one person can have on many.

We believe in leaders, and in supporting the kind of leadership that can be a catalyst for change in our communities. The kind of leadership that inspires action, invites innovation, and gets results.

We believe that when people have access to career counselling and career development, they make better decisions about their lives – allowing them to understand their talents and skills, and to pursue their passions.

Ultimately, we believe in people. And in allowing and challenging people to live better, happier and more fulfilling lives. By so doing, we believe they will contribute to a healthier and more prosperous Canada.

Guiding Principles:

- **Be Bold.** We take smart risks, and provide leadership by addressing complex and challenging issues.
- **Collaborate.** We build our relationships on a foundation of trust that allows for flexible partnerships, while promoting learning within our community so practices can be communicated, built upon and improved.
- **Maximize our Impact.** We support partners and initiatives that have the potential to deliver significant change – either directly or through a ripple effect.
- **Invest in Leadership.** We know that leadership begets results, and we look to fund exceptional leaders who can deliver on an initiative, regardless of its scope or scale.
- **Think Long-term.** We acknowledge that it takes time to affect large scale societal change.

AREAS OF FOCUS

In addition to strengthening its own governance and operational practices, and increasing our transparency, the Foundation articulated some priority areas where it plans to engage and apply its resources. These areas of focus are:

1. Help Foster a Sense of Clarity About and Recognition of the Value of the Career Counselling & Career Development Field

The career counselling and career development field is highly fragmented, and crosses multiple sectors and industries – from secondary & post-secondary counsellors, governments at all levels, private sector career coaching and outplacement agencies, human resources professionals, social service agencies, vocational guidance, immigrant and aboriginal serving agencies, and the like. Among our goals will be to:

- Participate in dialogue around developing a common nomenclature that elevates the perceptions and profile of career professionals from all sectors.
- Build awareness within the sector of best practices and the value of the roles the respective sector participants play.
- Help to educate Canadians by facilitating the public conversation about the tremendous value career professionals can provide.

2. Actively participate in the Discussion of the Link between Education and Work in Canada

Elements of the Canadian economy can be characterized as having jobs with no people and people with no jobs. In some cases, there are disconnects between the government & industrial policies, educational institutions and the needs of the labour market, and how Canadians get streamed towards careers. We plan to:

- Engage with career professionals to ensure Canadians have access to the information they need about the types of education and career choices that are available, as a means of supporting the evolving needs of the economy and workplace.
- Collaborate with others to advocate in favour of the value of pursuing entrepreneurship, trades and other different kinds of work and the educational pathways required for them.

3. Becoming More Active in the Philanthropic and Charitable Sectors

We are looking at other ways in which we can support the sectors in which we participate. This could include the following:

- Building respectful and collaborative relationships with philanthropic and charitable organizations through active participation in sector-related organizations.
- Increasing our focus on knowledge sharing, research and publications within Canada.
- Acting as a convener, point of intersection and knowledge broker both for our grant recipients as well as organizations within our sphere of influence.