

# Venture in corporate karma makes dollars and sense

## Founder of Dexterity Consulting links values with charities

BY MARIO TONEGUZZI, CALGARY HERALD AUGUST 30, 2009



Alberta College of Art & Design student Jessica Roh photographs Gena Rotstein, founder of philanthropic brokerage Dexterity Consulting, in downtown Calgary.

**Photograph by:** Ted Jacob, Calgary Herald, Calgary Herald

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Her passion is community building. It seemed only natural that passion would be translated into working in and with the non-profit sector over the years for Gena Rotstein, founder of Dexterity Consulting, Canada's first and only philanthropic brokerage firm.

Rotstein helps individuals, families and businesses donate their money, matching their social values with the most effective charities for them.

"My model is called karma and cents. Basically what that looks at is what are social value drivers that help us make our everyday decisions and what are we doing to mirror those social value drivers with our community activities," says the native Calgarian.

The minimum donation on an annual basis is \$50,000, which can be split up to a maximum of five charities. The donors come to Rotstein.

Her largest donor puts almost half a million dollars annually into the community.

"My target is small, medium-sized businesses, typically family-owned, and individuals," she says. "The reason why I'm targeting small, medium-sized businesses that are family-owned is because their business values typically mirror what their personal values are anyway. They're family-operated and that need for connecting in community is stronger than if you were to go to a larger company."

Rotstein says her firm goes beyond offering standard advice on charity.

"What makes it a philanthropic brokerage firm as opposed to just somebody who advises in philanthropy is, what I do as we go through this model, we identify risk tolerance. The charities that get presented to the client are not just charities that have low overhead to program development ratios. But they look at what are the interests of the donor and what's the tolerance level of this donor."

Young Entrepreneurs:

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For the month of August, the Herald will feature a series about young entrepreneurs who are making a name for themselves in Calgary's business community.

She creates portfolios around those social values. The risk tolerance of the donor helps determine what charities are placed into a portfolio of organizations depending on those social values.

Last year, Rotstein had six donors with a total of over half a million dollars donated into the global philanthropic community.

Her fee structure is a fee for service and it's based on project costs. For an individual or family donor, her fees start at \$3,600 and for a business it's \$5,000. Fees can go up from there, depending on the service she is giving.

"It depends on if I'm just doing the research and making recommendations or if I'm actually managing the disbursement, if I'm managing the relationship. The more involved I am, the more costs there are," she says.

Carey Fraser, president of The Fraser Group Inc., began mentoring Rotstein through the Canadian Youth Business Foundation a little less than a year ago.

It was a natural fit. Fraser's company raises money for non-profit organizations and charities--half of it in international relief and development and the other half in local charities.

Fraser and Rotstein share office space in Gallery 213 in the Art Central building in downtown Calgary across the street from the massive Bow tower development. The front of their office is reserved as space for artists' work, which is for sale. The walls are rented to the artists.

In early September, the internationally acclaimed Milestones Project photo exhibit will be on display there. The two-month exhibit follows the 19 milestones from birth to adulthood of children from around the world.

"Gena's idea is brilliant," says Fraser, recalling when she first met Rotstein and discovered her philanthropic brokerage firm concept. "Social philanthropy, understanding donors and understanding how better to utilize and leverage their dollars towards philanthropy and social change. I think not only is it an incredible idea, but it's a valuable idea and it's needed in the way charities operate and donors operate."

She describes Rotstein as being strategic and bright.

"She sees how the relationships can be brought together--that of a donor and that of a charity and utilized in a way that capacity is built on both sides," adds Fraser.

"Gena is very strategic. She can look at an issue or a problem, identify it quicker and then identify the steps with which to solve that. Gena is very, very strong in coalition building and relationship building. She knows who to bring to the table and how best to build a relationship."

The 34-year-old Rotstein was born and raised in Calgary. After graduating from Western Canada High School, she did an undergraduate degree at York University in Toronto in history and Jewish studies. She then went to graduate school at Brandeis University in Boston. There she studied non-profit management and Jewish communal service.

Rotstein says her degree from York was a "very useful" one and she came back to Calgary in 1996 for a few months "to figure out what I wanted to be when I grow up because what do you do with a degree in that?"

She got a job working at the Calgary Jewish Centre running its senior adult program and managed to take the little department and turn it into a viable program within the centre. When she joined the department, the program worked with the new Russian Jewish senior immigrant population in the city focusing on integrating them into the community. When Rotstein took it over, that component was kept, but it also looked at the demographics of the community and started to look at a more holistic approach to providing programming for people 55 and older.

Four or five months into this project, her boss told her that if she wanted to make a living working in the non-profit sector, Rotstein should get a master's degree, because her strengths are in management.

"The idea was to come back to the Jewish community and bring the management skill set that I learned there and integrate it into effective business planning for the community," she says.

But after graduating from Brandeis she ended up staying in the United States and working for Jewish organizations in Rhode Island, Ohio and New Jersey before moving back to Calgary in 2002.

"In all of those positions I was required not only to do program delivery, but actually do business development and fundraising and staff supervision and management," she says.

When she returned to Calgary, she did some fundraising consulting in the charitable sector and was involved in the Jewish community, working almost full time. In 2005, she joined CentrePoint, a local non-profit management organization, and ran its fundraising department.

In 2008, she launched the philanthropic brokerage Dexterity.

Prior to launching Dexterity, she took the Leadership Calgary program, "which is a course on critical thought and systems thinking. And I realized that we actually as a society have created a broken system," she says.

"The second-largest economic driver to Canada's GDP is the charitable sector and yet it's seen as the poor step-child to business and public . . . What if we actually created an integrated system where not just market drivers but there was a relationship that was happening that actually created real social change as opposed to these individual pockets of really cool things that are going on."

In July, Rotstein was part of Canada's delegation to the Young Entrepreneur's G-8 Summit in Italy.

She has developed an index of organizations that are vetted against risk. The next phase for Dexterity is working on how to make this information accessible beyond her client base.

"I see this evolving into . . . this place for one-stop shopping for smart charitable giving and building communities around it," says Rotstein.

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dexterity Consulting founder Gena Rotstein, at her art Central location in downtown Calgary, sees her company providing "one-stop shopping for smart charitable giving."

**Photograph by:** Ted Jacob, Calgary Herald, Calgary Herald

