

Community Foundation of Portage & District Strategic Plan 2024-2027



Priority 1 – Granting

| Objectives / Goals What? | Action Steps How? | Goal / Anticipated Results | Partners With Whom? | Timeline START When? | Date Completed |
|-----------------------------|---|---|--------------------------|-------------------------|-------------------|
| 1.1 GRANTING | Community Assessment of identified needs to help guide granting. (create a granting manual as a reference that would include all these steps)? | Revisit Community Assessment in 3 yrs. Review other community assessments. | Grants Committee | 2024 Budget | |
| 1.2 GRANTING | Active Grant impact storytelling. | After receiving final evaluations, have grantees share impact of grant and share on social media platforms, newsletters, and website. | ED & Marketing Assistant | Ongoing | |
| 1.3 | | Award & Bursary Committee | Awards & | | |

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| GRANTING | Increase awareness of available bursaries, and bursary applications. | meet to discuss best methods on how to increase awareness. Provide award and bursary information to school, colleges, adult learning centers and universities. | Bursary Committees ED | Ongoing | |
| Objectives / Goals What? | Action Steps How? | Goal / Anticipated Results | Partners With Whom? | Timeline START When? | Date Completed |
| 1.4 GRANTING | Clear granting priorities for undesignated funds. | Develop granting priorities based on community assessment & strategic plan. | Grants Committee | Ongoing | |
| 1.5 GRANTING | Create clear granting policies & procedures for non-qualified donees. | Update policies, procedures, applications, and guidelines. | Grants Committee | Ongoing | |

Priority Two: Board Diversity & Education

| Objectives / Goals What? | Action Steps How? | Goal / Anticipated Results | Partners With Whom? | Timeline START When? | Date Completed |
|---------------------------------|---|--|--|--|----------------|
| 2.1 Board Diversity & Education | Board members reflect community demographics. | Board members actively seek new diverse members which can lead to a broader range of perspectives and ideas. | Board Members | Ongoing as members need to be replaced | |
| 2.2 Board Diversity & Education | Recruitment plan for board members and volunteers that considers board needs, individual strengths, and the diversity of our community. | Develop a plan to recruit board members and volunteers | | | |
| 2.3 Board Diversity & Education | Board members understand CFPD operation, policies and processes through orientation and education. (internal and external). | <p>Develop a plan for ongoing board education.</p> <p>Update board governance, accountability, goals, and procedures.</p> <p>Attend Endow MB and CFC conference to better understand CF Network.</p> | <p>Exec Committee</p> <p>Govern Committees</p> <p>Board & ED</p> | 2024 | |

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| 2.4 Board Diversity & Education | Board educated on community needs and cultural issues. | Community assessment. Guest speakers. Board attends events and engage with grantees, donors, etc. | Exec Committee | Annually | |
| | PRIORITY 3 Community Education & Engagement | Goal/Anticipated Results | Partners? With Whom? | Timeline START When? | Date Completed |
| 3.1 Community Education & Engagement | Increase Awareness | Continue to create awareness through marketing in a variety of social media platforms, newsletters, local media, and website. Develop and implement new marketing plan. Continue to create awareness by engaging younger donors through partnerships, campaigns & social media posts. | ED & Marketing Assistant | 2024 | |

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| 3.2 Community Education & Engagement | Strengthen relations with organizations who represent and serve a variety of demographics. | Reaching out to organizations that have not reached out to us. What are their needs and offer support. Explain opportunity to apply for CFPD grants. Continue to attend community events. Continue to attend Network for Non-Profits meetings. | Board & ED ED | Ongoing | |
| 3.3 Community Education & Engagement | Continue to be a trusted philanthropic agent. | Maintain transparency. Create marketing material that promote CFPD's position of community trust and ability to offer broad range of donor options. | ED / Marketing Assist. Executive Committee | | |

| PRIORITY #4 ORGANIZATION CAPACITY | | GOAL/ANTICIPATED RESULTS | PARTNERS WITH WHOM? | TIMELINE START WHEN? | DATE COMPLETE |
|-----------------------------------|---|---|---------------------|----------------------------|---------------|
| 4.1 Organization Capacity | Increase revenue streams. | Develop strategy on how to increase revenue streams. | | Fund Development Committee | 2024 |
| 4.2 Organization Capacity | Ensuring internal staff and technical resources address organizational needs. | Through staff meetings, ED to check in with staff to offer support when and if it is needed. ED to continue to work as a team leader. | | ED | 2024 |

| | PRIORITY #5 Donor Engagement & Growth | Goal/Anticipated Results | Partners? With Whom? | Timeline start When? | Date Completed |
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| 5.1 Donor Engagement & Growth | Increased profile & target audiences. | Continue to host events such as 150 Women Who Care. Online, marketing, news, social media. Host Social Media contests. | Board & ED | | |
| 5.2 Donor Engagement & Growth | Actively solicit & engage with new donors. | Create a toolkit for agency funds. Compile a list of business contacts (new donors.) Reach out to agencies who currently have an agency fund to share their input. | ED Board ED | | |
| 5.3 Donor Engagement & Growth | Maintain and enhance connections and communication with current donors to retain their interest and commitment to Foundation giving. | Thankyou cards, phone calls, newsletters, social media posts. Board contacts all donors Review inactive fund files, do they want to add to their fund. | Office Staff Board ED | | |

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| 5.4 Donor Engagement & Growth | Enhance communication with current fund holders. | Create Donor Engagement Policy. Plan & host event for fund holders. | Governanc e Committee ED/Board | | |
| 5.5 Donor Engagement & Growth | Connect with Advisors to increase awareness. | Develop new pamphlets to place at law offices, funeral homes, accounting firms, financial advisors. | ED & Marketing Assistant | | |

