

## Granting for Impact

### KEY OUTCOMES

- Complete assessment of current granting
- Compiled community assessment of identified needs to help Guide Granting
- Active grant impact storytelling
- Clear granting priorities for undesignated funds

### Granting

Completed the Expression of Interest and attended webinar for Recovery Fund Grants Program

### Bursaries

Coordinated all PCI Bursary Recipients & Letters  
Issued cheque for all PCI Managed Bursaries

Coordinated all CFPD Bursary Recipients & Letters  
Verified all eligibility & issued CFPD Bursary payments

**Grant Analysis** ◆ Complete

**Community Assessment** ◆ In Progress

Next Check in for Community Assessment – September 15<sup>th</sup>

**Grant Impact Storytelling** ◆ In Progress

**Granting Priorities** ◆ Not Started

Progress: ◆ Complete ◆ In Progress ◆ Overdue ◆ Not Started

## Board Diversity & Education

### KEY OUTCOMES

- Board members reflect community demographics
- Diversified list of potential board members
- Community volunteers to reflect community demographics
- Board educated on community needs and cultural issues

### Board Succession Plan In Progress

Received new Candidate Applications forms

Conducted new Board Member Orientation August 31<sup>st</sup>

### Potential Board Member List In Progress

### Volunteer Succession Plan Not Started

### Board Development Plan Complete / Ongoing

## Increased Awareness

### KEY OUTCOMES

- Continued awareness through a variety of social medias
- Continued awareness by engaging younger donors
- Continued awareness by staying up to date with digital marketing
- Increased engagement/relations with key community and government stakeholders
- Strong relations with organizations who represent and serve a variety of demographics
- Viewed as a trusted philanthropic organization
- Continued development of innovative events to engage new donors

## Marketing Plans & Strategies ◆ In Progress

Compiled the 2021 Annual Report including sponsorships

### Social Media

**Current Stats** – Facebook 1040 Followers & 857 Likes, Instagram 594, Twitter 146

2022 Annual Celebration & Meeting, Community Well Being Survey, Winners from Community Well Being Survey, Annual Celebration pictures, Father's Day, Presentation to Rotary for Community Well Being Survey, CFPD Bursary Recipients, National Indigenous Peoples Day, Executive Director Hiring, Holiday Avenue Project Grant, Farwell to Board Members, Portage Mutual Donations, Congratulations Grads, Canada Day, Southport Anniversary Marathon, Gage Foster Award Recipient, Auna Marie Brown Fund Presentation, Potato Festival, Foundation Features, Terry Fox Day, Local Projects, Reoccurring Giving, Power of Endowments, PCRC New ED, Herman Prior Car Hop, I Heart Festival, United Way Night Market, Whoop & Hollar Festival, New Executive Director at CFPD

## Continued Awareness & Marketing ◆ In Progress

### Website

Annual Celebration, Bursary Recipients, New Annual Report, Recurring Giving, Foundation Feature, Animated video, Community Well Being Survey, Hiring ED, New CFPD ED, Southport Marathon,

### Advertising

Print Foundation Features

June – Bursary Recipients

July – Yellowquill School Family Room

August – Service for Seniors Grant

Press Release

## Recognized Community Leader ◆ In Progress

Presented at Portage Rotary for Community Survey

Attended Chamber Luncheon – June 16<sup>th</sup>

Attended Chamber Wine & Nine Tournament – June 23<sup>rd</sup>

Attended PCI Sports Awards to Present Arlan Asham Award

Attended Herman Prior Board Meeting to discuss their Fund

Attended Victoria Espey - PCRC Farewell

## Events Strategy ◆ In Progress

- Prepared & executed Annual Celebration Event on June 16<sup>th</sup>

Progress: ◆ Complete ◆ In Progress ◆ Overdue ◆ Not Started

## Strengthened Organization Capacity

### KEY OUTCOMES

- Financial capacity will equal goals and expectations
- Upgraded technology including an integrated fund accounting & database platform
- Increased revenue streams to provide more budget options

### Financial

Reconciled Bank Accounts & Credit Card July 30, 2022  
 Accounts Payables & Payroll completed  
 Tax Receipts updated & completed until August 31, 2022  
 Fund Disbursements completed for June, July & August  
 Finalized Audit with MNP  
 Completed Brenda Robinsons ROE  
 Filed GST Claim

### Operational

Prepared for Bursary Committee Meeting June 1<sup>st</sup>  
 Met with Selkirk & Brandon CFs – June 1<sup>st</sup>  
 Prepared for Executive Meeting June 7<sup>th</sup>  
 Prepared for Board Meeting June 16<sup>th</sup>  
 Conducted Marketing Assistant Interviews  
 Posted Executive Director Job Ads  
 Mandy Away June 23-July 7  
 Prepped for Committee Planning Meeting – August 16<sup>th</sup>  
 Prepped for new ED – updated Office Manual, Policy Binder, Committee files, Board Portal, Board schedules & rosters  
 Created new donation form  
 Training new Executive Director – August 29<sup>th</sup>  
 Prepared for Executive Committee Meeting – August 31<sup>st</sup>

### Operating Fund deposits in June-August 2022

Southport Advertising x 3	\$351.75
Hills Drug Store – AR Sponsorship	500.00
McKenzies – AR Sponsorship	500.00
HUB – AR Sponsorship	500.00
<b>Grand Total</b>	<b>\$1,055.25</b>

**Financial Capacity & Plans** ◆ Complete

**Updated Technology** ◆ In Progress

Solutions IT conducted annual site visit

Moved all files to OneDrive

**Progress:** ◆ Complete ◆ In Progress ◆ Overdue ◆ Not Started

# JUNE - AUGUST 2022 EXECUTIVE DIRECTOR REPORT

## Donor Engagement & Growth

### KEY OUTCOMES

- Increased profile & target audiences
- Actively soliciting and engaging new donors
- Execute the Ducks in a Row event (replace Will Week)
- Introduce pre-authorized /multiple annual donations program
- Connect with Advisors to increase awareness

### Donor Acquisition ◆ In Progress

Met with Portage Learning & Literacy Centre for Potential Fund

### Donor Engagement ◆ Complete & ◆ In Progress

Completed '21 Fund Statements & distributed with Annual Report  
Compiled Fund Anniversary Certificates & distributed

### Growth - Donations for June – August 2022 \*New Fund

Smart & Caring Community Fund	\$635
Burnside Cemetery Fund	\$390
Oakville Cemetery Fund	\$1000
Ian McKenzie Fund	\$457,501
Harvey & Barbara Carmichael Fund	\$75
Longburn Cemetery Fund	\$200
Portage Mutual Insurance Fund	\$10,000
Oakville & District Community Fund	\$2,000
Gemmell Family Fund	\$5,000
Sports & Recreation Fund	\$50
Wilmac Portland Fund	\$20,000
Southport Fund	\$290
Elmer & Joyce Rutter Family Fund	\$500
Joyce Dalmyn & Joe Masi Fund	\$100
Arnold & Wendy Blight Family Fund	\$300
Lions Club of Portage Fund	\$125
Portage & District Wildlife Fund	\$500
<b>Grand Total</b>	<b>\$498,666</b>

### Comparison from 2020, 2021 & 2022 for Monthly Donations

	2020	2021	2022
<b>Jan</b>	\$8,570	\$3,065	\$6,960
<b>Feb</b>	\$19,390	\$15,990	\$5,875
<b>Mar</b>	\$6,771	\$38,505	\$16,861
<b>Apr</b>	\$7,020	\$3,975	\$3,165
<b>May</b>	\$6,955	\$57,803	13,027
<b>Jun</b>	\$9,610	\$1,725	18,310
<b>Jul</b>	\$15,921	\$470	20,770
<b>Aug</b>	\$30,163	\$150	\$459,586
<b>Sep</b>	\$74,262	\$546,246	
<b>Oct</b>	\$54,386	\$28,398	
<b>Nov</b>	\$66,300	\$132,701	
<b>Dec</b>	\$364,308	\$81,453	
<b>TOTAL</b>	<b>\$663,656</b>	<b>\$910,480</b>	<b>\$544,554</b>

### Reoccurring Giving Program ◆ Complete

One monthly recurring donation through Donor Perfect

### Planned Giving Strategy ◆ In Progress

Progress: ◆ Complete ◆ In Progress ◆ Overdue ◆ Not Started