

# 2020-2023 Strategic Plan Update & Priorities for 2022

## Strat Plan Updates

### Strategic Initiative 1. Granting for Impact

#### Anticipated Results by 2023

- 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

#### Completed Tasks

- A complete review of our past grants and areas of support was completed in 2020
- A review of this grants report will be provided to the Board annually for review
- Grant Impact only being showcased in Foundation Features and social media
- New Grant Evaluation form was implemented, with no improvements
- Past grants “Where are you Now” questionnaire created\*

#### Incomplete

- Comprehensive Community Assessment (CA)
  - Working to completed by end of 2022 with PCRC & Urban Systems
- Grantee and Public Forums
  - To be conducted during the Community Assessment process & Endow Manitoba Pilot Project
- Grant Priorities
  - Suggest to move to new Strat Plan & use information from the completed CCA Report
- Grant Assessment Tool
  - To be created after from grant priorities set to evaluate
- Grant Impact Stories
  - Impact Stories need to be developed & create consistent communication plan

### Strategic Initiative 2. Board Diversity & Education

#### Anticipated Results by 2023

- 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

#### Completed Tasks

- Conducted Assessment of Current Board skills and diversity & identified areas of need
- Board Members recruited to meet skill and diversity needs
- Completed Assessment on Board Development

#### Incomplete

- Board Matrix Tool for Recruitment
- Volunteer Assessment & Update potential volunteer listing

## Strategic Initiative 3. Increased Awareness

### Anticipated Results by 2023

- 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

### Completed Tasks

- Reviewed Social Media platforms & implemented formal Social Media Strategy\*
- Digital Media Researched & Animated Digital Video Created
- Strengthened connections with other non profits and reinstated Network of Non Profits
- Committed to producing a Community Assessment Report to help guide other Non Profits & Granting
- Virtual 150 Women Who Care
- Communicating Partnerships & Relationships is communicated as they happen

### Incomplete

- Generation X & Millennial Strategies need to be created
  - Ongoing pandemic limitations interfere with timelines & goals
- Explore Potential Events: Ducks in a Row, Professional Advisors, etc.
  - Will need to evolve as pandemic continues & restrictions are instated
- Communication Plan for Engaging Public & Non Profits
  - Engagement to be part of Community Assessment & Endow Manitoba Pilot Project
- Recognized Community Leader
  - Need to capitalize on progress and identify further opportunities

## Strategic Initiative 4. Strengthened Organization Capacity

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

### Completed Tasks

- Annual Budget Process Reviewed
- Operating systems evaluated and updated as required
- Required new policies identified\*

### Incomplete

- Financial Plan
- Policy Development

## Strategic Initiative 5. Donor Engagement & Growth

- 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

### Completed Tasks

- Donor Engagement Policy/Strategy reviewed and updated
- Donor Appreciation Opportunity – 25<sup>th</sup> Anniversary paintings
- Recurring Giving Program Launched
- Continued training with CAGP for Planned Giving

### Incomplete

- Donor Acquisition Plan
- Ducks in a Row Event
- Planned Giving Strategy

## Priorities for 2022 to Complete Strategic Plan

1. Comprehensive Community Assessment Report
2. Develop Communication Plan for Engaging Public & Non Profits
3. Develop Grant Impact Stories
4. Board Matrix Tool for Recruitment
5. Volunteer Assessment & update potential volunteer listing
6. Potential Events – In person 150 Women Who Care & Ducks in a Rows
7. Communication Plan for Engaging Public & Non Profits
8. Identify further opportunities for Community Leadership & Expand Network of Non Profits
9. Financial Plan
10. Identify new policies required & continue to combine duplicate policy content
11. Create Donor Acquisition Plan
12. Develop a Planned Giving Strategy

## Consider moving to 2023 Strat Plan

1. Set Grant Priorities
2. Develop Granting Assessment Tool
3. Develop Generation X & Millennial Strategies