

# Community Foundation of Portage & District Strategic Plan 2024-2027



## Priority 1 – Granting

Objective	Action Steps	Goal	Partners	Timeline	Results
1.1	Community Assessment of identified needs to help guide granting.	<ul style="list-style-type: none"> <li>Revisit Community Assessment in 3 yrs.</li> <li>Review other community assessments.</li> </ul>	Grants Comm	February 2024	Reviewed the City Guide
1.2	Active Grant impact storytelling	<ul style="list-style-type: none"> <li>After receiving final evaluations, have grantees share impact of grant and share on social media platforms, newsletters, and website.</li> </ul>	ED & Mar Asst	Jan 2024 Feb 2024 Mar 2024	Oakville CC Cadets Ptg Curling Club

1.3	Increase awareness of available bursaries, and bursary applications.	<ul style="list-style-type: none"> <li>Award &amp; Bursary Committee meet to discuss best methods on how to increase awareness.</li> <li>Provide award and bursary information to school, colleges, adult learning centers and universities.</li> </ul>	Awards & Bursary Committees	Feb 2024  Feb 2024  Feb 2024	Updated all bursary information and sent to all schools in Ptg & area.  Updated Kathleen Bjornason application and sent directly to all schools, this has resulted in several applications this year.  Sent all CFPD bursary information to all high schools, colleges & universities in Manitoba.
1.4	Clear granting priorities for undesignated funds.	Develop granting priorities based on community assessment & strategic plan.	Grants Committee		
1.5	Create clear granting policies & procedures for non-qualified donees.	Update policies, procedures, applications, and guidelines.	Grants Committee	Ongoing	Updated all bursary information and sent to all schools in Ptg & area.

## Priority 2: Board Diversity & Education

Objective	Action Steps	Goal	Partners	Timeline	Results
2.1	Board members reflect community demographics.	<ul style="list-style-type: none"> <li>Board members actively seek new diverse members which can lead to a broader range of perspectives and ideas.</li> </ul>	Board Members	Ongoing as members need to be replaced	
2.2	Recruitment plan for board members and volunteers that considers board needs, individual strengths, and the diversity of our community.				
2.3	Board members understand CFPD operation, policies and processes through orientation and education	<ul style="list-style-type: none"> <li>Develop a plan for ongoing board education.</li> <li>Update board governance, accountability, goals, and procedures.</li> <li>Attend Endow MB and CFC conference to better understand CF Network.</li> </ul>	Exec Committee  Govern Committees  Board & ED	Jan 2024  Feb 2024  April 2024	Offered financial statement workshop for Grants Committee and Board Members.  Placed Board Orientation Package on Board Portal in February.  Directed BOD's to Workplan, Roster, Meeting Schedule, etc on Board Portal.  ED & Executive will attend Endow Conference in April 2024.
2.4	Board educated on community needs and cultural issues.	Community assessment. Guest speakers. Board attends events and engage with grantees, donors, etc.	Exec Committee	Feb 2024	ED has connected with various groups to request they speak at board meetings.

**PRIORITY 3: Community Education & Engagement**

Objective	Action Steps	Goal	Partners	Timeline	Results
3.1	Increase Awareness	<ul style="list-style-type: none"> <li>Continue to create awareness through marketing in a variety of social media platforms, newsletters, local media, and website.</li> <li>Develop and implement new marketing plan.</li> <li>Continue to create awareness by engaging younger donors through partnerships, campaigns &amp; social media posts.</li> </ul>	ED & Marketing Assistant	Weekly  Monthly  Feb 2024    Monthly  Feb 2024	Posts to social media 3 times per week minimum.  Creates and sends out Press Releases monthly.  2024 Marketing Plan was presented to the BOD in February 2024 and it was approved by consensus at the February board meeting.    We get new, younger followers every month on social media.  Over 40 new attendees at the 150 WWC event in 2024.
3.2	Strengthen relations with organizations who represent and serve a variety of demographics.	<ul style="list-style-type: none"> <li>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.</li> <li>Continue to attend community events.</li> <li>Continue to attend Network for Non-Profits meetings.</li> </ul>	Board & ED  ED  ED	Feb 2024    Feb 2024	ED requested meetings with Salvation Army, United Way & PCRC to discuss needs.   Attended an ED meeting in Brandon.  Attended a virtual CFC ED Peer Group webinar.  Attended an event at the library.

<b>3.3</b>	Continue to be a trusted philanthropic agent.	Maintain transparency.  Create marketing material that promotes CFPD's position of community trust and ability to offer a broad range of donor options.	ED/ Marketing Asst.  Executive Committee		
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## PRIORITY #4 ORGANIZATION CAPACITY

Objective	Action Steps	Goal	Partners	Timeline	Results
4.1	Increase awareness.	Develop strategy on how to increase revenue streams.	Fund Devl. Com	Jan 2024	
4.2	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	Monthly	Hold monthly staff mtgs
4.3	Ongoing assessment of community resources, needs and opportunities	Stay connected to stakeholders, organizations, and grantees.	Board & ED	2024	

## PRIORITY #5 Donor Engagement & Growth

Objective	Action Steps	Goal	Partners	Timeline	Results
5.1	Increased profile & target audiences.	<ul style="list-style-type: none"> <li>Continue to host events such as 150 Women Who Care.</li> <li>Online, marketing, news, social media. Host Social Media contests.</li> </ul>	Board & ED	Feb 2024 Weekly	Fabulous Increased followers
5.2	Actively solicit & engage with new donors.	<ul style="list-style-type: none"> <li>Create a toolkit for agency funds.</li> <li>Compile a list of business contacts (new donors.)</li> <li>Reach out to agencies who currently have an agency fund to share their input.</li> </ul>	ED Board ED	Jan 2024 Jan 2024 Jan 2024	ED created Toolkit and sent to all Non-Profits in Portage & area. Three board members sent in lists. Ed Contacted re: Funds. Response was negative. They feel donors will stop donating if they know they have a large Fund.

<p><b>5.3</b></p>	<p>Maintain and enhance connections and communication with current donors to retain their interest and commitment to Foundation giving.</p>	<ul style="list-style-type: none"> <li>• Thankyou cards, phone calls, newsletters, social media posts.</li> <li>• Board contacts all donors.</li> <li>• Review inactive fund files, do they want to add to their fund.</li> </ul>	<p>Office Staff</p> <p>Board</p> <p>ED</p>	<p>Jan &amp; Feb 2024</p> <p>Jan/Feb 2024</p>	<p>It was decided in Nov that the board would call all donors regardless of size of donation. ED created a call sheet for BOD to fill out when calling. Did not seem to go well with so many board members away in winter months.</p> <p>Contacted Fund Holders to see if they want to contribute further</p>
<p><b>5.4</b></p>	<p>Enhance communication with current fund holders.</p>	<ul style="list-style-type: none"> <li>• Create Donor Engagement Policy.</li> <li>• Plan &amp; host event for fund holders.</li> </ul>	<p>Gov Comm</p> <p>ED/Board</p>		
<p><b>5.5</b></p>	<p>Connect with Advisors to increase awareness.</p>	<p>Develop new pamphlets to place at law offices, funeral homes, accounting firms, financial advisors.</p>	<p>ED &amp; Marketing Assistant</p>	<p>Jan 2024</p>	<p>Created pamphlets and ED personally took them to all law firms, accounting firms, financial advisors firms and funeral homes.</p>



