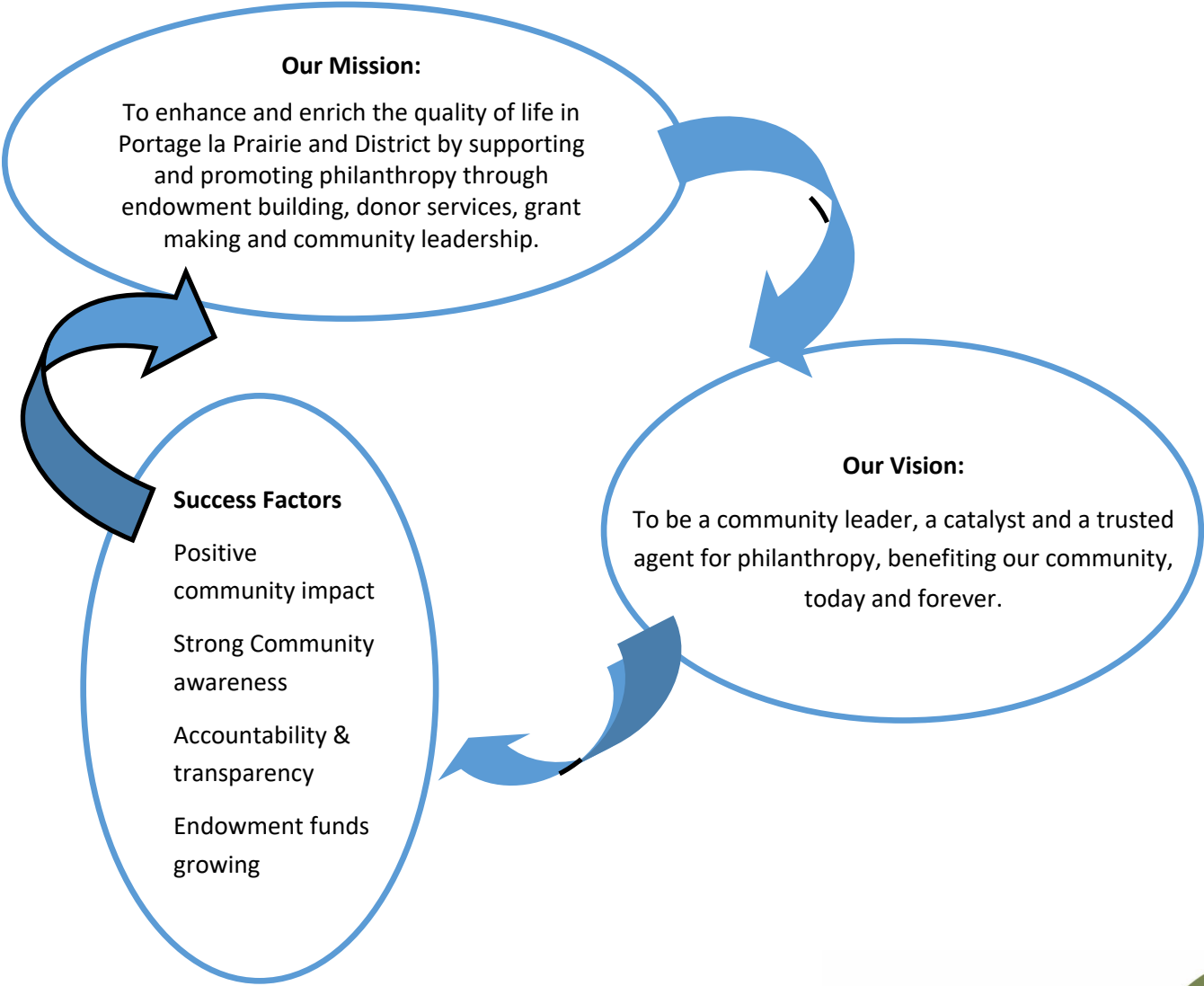




STRATEGIC PLAN (2024-2027)
Community Foundation of Portage & District





Message from the Executive Director—Kimberley Lavallee

Since our last plan, we have had some very challenging times to work through and it feels good to say that we feel we came out on top.

The fact that Covid continued to have a slight grip on some of our functions, we worked through them and finished 2022 successfully and with great optimism. The pandemic left us with some needs within the community, needs we have never seen before and we were able to address some of those needs.

The organization also saw change in the Executive Director when Kimberly Lavallee took over the position vacated by Mandy Dubois.

Kim jumped into the role with immediate positive results and within a few months she had built a high level of confidence with the entire Board. We also welcomed Melanie Moran to complete our office staff.

In 2022, a total of \$215,950.00 in grants was distributed back to the community. Our 150 Women Who Care event was again held in person and was a huge success and tickets sold out in record time. The 2022 \$10,000 grant recipient was the Family Resource Centre.

We continue to believe in the power of generosity to create lasting change, and we will work tirelessly to make differences in the lives of those in our community.



Our Organization

The Community Foundation of Portage and District Inc. owes its existence to the Thomas Sill Foundation's commitment to rural philanthropy and to the dedication of a few Portage citizens who foresaw the value of a community foundation for all within Portage la Prairie and District.

In 1993 the Thomas Sill Foundation (TSF) announced the assignment of \$1 million to help create ten new community foundations in rural and northern Manitoba. TSF made a pledge of \$100,000 payable over four years, if a further \$200,000 was raised in the community. Portage was selected to be one of the first to take on the challenge.

An informational meeting was held on April 19, 1994. A steering committee was formed with representatives from business, arts, service organizations, education and other groups in the community. Over the next eight weeks, a great deal of hard work brought the foundation into existence.

On June 2, 1994, the Community Foundation of Portage and District Inc. was incorporated, and the Nominating Committee was struck. The committee met to select the first Board of Directors and from there an application was made for charitable registration status.

The Founders Club was established and by December 31, 1995, there were 162 founding members who generated \$215,000. The challenge was met in fourteen months and the TSF awarded CFPD \$100,000 to add to CFPD's permanent Endowment Fund.

CFPD's Endowment Fund steadily grew over the years thanks to our many generous donors. Through two community match challenges, sponsored by an anonymous donor, CFPD raised \$225,000 for the endowment fund and a matching amount was granted to charitable organizations.

In year ten, after a generous bequest of \$240,000 from Violet Graham Breakey, CFPD made its first million. Four years later, in 2008, the Portage la Mutual Insurance Company added another \$10,000 to its named fund and brought the permanent Endowment Fund over the \$2 million mark.

In 2019 CFPD celebrated its 25th Anniversary and launched a fundraising campaign to grow the endowment fund to \$10 million. The anniversary celebration and fundraising campaign were successful in building awareness of CFPD, and although the goal was not reached, over \$900,000 was added to the Endowment Fund and many new funds were created. As of December 2019, the CFPD endowment fund was over \$9.3 million and in 2023, just over 12 million.

Vision

To be a community leader, a catalyst and a trusted agent for philanthropy, benefiting our community, today and forever.

Mission

To enhance and enrich the quality of life in Portage la Prairie and District by supporting and promoting philanthropy through endowment building, donor services, grant making and community leadership.

Values

Partnerships

Working together with donors, other funders, planners and community groups, we foster the creation of new ideas and solutions.

Openness

We practice open, accessible and ethical behavior towards all who come in contact with the Foundation.

Responsiveness

We believe that a proactive, innovative approach will produce grantmaking that meets the challenges of today and tomorrow, fulfilling the vision of our Founders.

Trust

We, as a Community Foundation, operate with policies and practices that reflect clearly articulated values that inspire trust and stress fairness, flexibility and inclusiveness. We regularly review our goals and practices.

Accountability

Our mission will be achieved through strong leadership, governance and capable administration. We provide information to donors and the broader community regarding the operations and impact of the Foundation.

Growth

Effective fiscal management, endowment funds growth, reliable stewardship and strategic grant making will promote the future stability of the Portage and District community.

Empowerment

We encourage actions to cultivate, nurture and sustain the capacity for self-reliance, as we believe it is an essential strength for individuals, organizations and communities.

Strategic Directions

Our Main Strategic Directions & Key Outcomes to achieve by 2026 are:

Granting

Community assessment of identified needs to help guide granting. Active grant impact storytelling.
Increase awareness of available bursaries, and bursary applications. Clear granting priorities for undesignated funds.
Clear granting priorities for non-qualified donees.

Board Diversity & Education

Board members reflect community demographics.
Recruitment plan for board members and volunteers that considers board needs, individual strengths, and the diversity of our community.
Board members understand CFPD operation, policies and processes through orientation and education (internal and external).
Board educated on community needs and cultural issues.

Community Education and Engagement

Increase Awareness.
Strengthen relations with organizations who represent and serve a variety of demographics. Continue to be a trusted philanthropic agent.

Organization Capacity

Increase revenue streams.
Ensuring internal staff and technical resources address organizational needs. Ongoing assessment of community resources, needs and opportunities.

Donor Engagement & Growth

Increased profile & target audiences.
Actively solicit and engage new donors.
Maintain and enhance connections and communication with current donors. Enhance communication with current fund holders.
Connect with Advisors to increase awareness.