

## 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

Met with School Division Staff to discuss issues with Granting & potential solutions and changes to processes.

### Bursaries

Reviewed Applications as received

Continued to solicit applications with contacts & on social media

Coordinated Bursary Committee Meeting for June 1<sup>st</sup>

Created Bursary Portal for Committee to review applications

**Grant Analysis** ◆ Complete

**Community Assessment** ◆ In Progress

Community Assessment Committee Meeting May 11<sup>th</sup>

Urban Systems Monthly Check in – May 26<sup>th</sup>

Submitted Small Grants Report to PCRC for the Community Assessment Grant \$5000

**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

Nominating Committee Meetings May 4<sup>th</sup> & May 11<sup>th</sup>  
Assisted with Potential Candidate Recruitments

**Potential Board Member List** ◆ In Progress

Added new candidates to ongoing list

**Volunteer Succession Plan** ◆ Not Started

**Board Development Plan** ◆ Complete / Ongoing

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

## 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

### Social Media

**Current Stats** – Facebook 1004 Followers & 835 Likes, Instagram 587, Twitter 146

Bursary Applications & Deadlines, Red Dress Day, Mothers Day, Last years Bursary Winners, Manitoba Day, Annual Celebration & Meeting, Hiring Ad, Victoria Day, Foundation Feature – LVS Grows, 2017 AGM & Celebration pictures, Recurring Giving,

## Continued Awareness & Marketing ◆ In Progress

### Website

Annual Celebration, Bursary Application Deadline, Recurring Giving, Foundation Feature, Animated video, Annual Report

### Advertising

Print Foundation Features- LVS Grows

### Press Release

## Recognized Community Leader ◆ In Progress

Registered 1 staff & 3 Board Members for the Endow Manitoba Fall Conference in Winnipeg

## Events Strategy ◆ In Progress

- Continued with plans for an Annual Celebration Event on June 16<sup>th</sup> including our AGM
- Continued planning for the Fall Ducks in a Row Event

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 April 30, 2022  
 Accounts Payables & Payroll completed  
 Tax Receipts updated & completed until April 30<sup>th</sup>  
 Fund Disbursements completed for May  
 Completed draft Audit with MNP  
 Revised Payroll periods to reduce “prepayments”

### Operational

Prepared for Executive Meeting May 5<sup>th</sup>  
 Prepared for Board Meeting May 17<sup>th</sup>  
 Prepared for Nominating Committee Meetings May 4<sup>th</sup> & 11<sup>th</sup>  
 Completed ED Performance Evaluations  
 Posted Marketing Administrative Assistant Job Ads  
 Prepped for Investment & Finance Committee Meeting May 17<sup>th</sup>  
 Prepped for Community Assessment Committee Meeting May 11<sup>th</sup>  
 Mandy Away May 25<sup>th</sup>  
 Completed Annual CFC Survey

### Operating Fund deposits in May 2022

Southport Advertising	\$351.75
<b>Grand Total</b>	<b>\$351.75</b>

**Financial Capacity & Plans** ◆ Complete

**Updated Technology** ◆ In Progress

Met with Solutions IT to review Enso Contract & other IT services available

Presented new ENSO Contract & IT options at Investment & Finance Committee Meeting

Moved all files from Dropbox to OneDrive

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

## 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 Poplar Point Cemetery on potential fund  
Finalized Ian McKenzie Fund Agreement – May 10<sup>th</sup>

### Donor Engagement ◆ Complete & ◆ In Progress

#### Growth - Donations for March 2022

##### \*New Fund

Smart & Caring Community Fund	\$80
Burnside Cemetery Fund	\$100
Bjorn & Roberta Christianson Family Admin Fund	\$2,500
Ian McKenzie Fund	\$10,122
Harvey & Barbara Carmichael Fund	\$25
Gage Foster Athletic Scholarship Fund	\$200
<b>Grand Total</b>	<b>\$13,027</b>

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

	<b>2020</b>	<b>2021</b>	<b>2022</b>
<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	
<b>Jul</b>	\$15,921	\$470	
<b>Aug</b>	\$30,163	\$150	
<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>\$45,888</b>

### Reoccurring Giving Program ◆ Complete

One monthly recurring donation through Donor Perfect

### Planned Giving Strategy ◆ In Progress

MAY 2022 EXECUTIVE DIRECTOR REPORT

Progress:  Complete  In Progress  Overdue  Not Started