



Westshore Community Foundation Inc. Strategic Plan 2022-2025

Executive Summary

Westshore Community Foundation Inc. (WCF) was created in 1998 and is an enduring charitable organization created to build a permanent capital fund, which supports registered charities and groups throughout the area along the west shore of Lake Winnipeg.

Through our alignment with both Endow Manitoba and Community Foundations of Canada we gain awareness and details of new funding programs that are being developed at the provincial and national level.

We value belonging, reconciliation, inclusiveness, and diversity. We want to see the community succeed. Through generous donors and willing volunteers working together, we are “Building a Lasting Legacy” to offer even greater support to the ongoing needs of groups and individual in and around the communities of Riverton, Gimli, Fraserwood, Winnipeg Beach, and Dunnottar.

As of 2022, WCF has grown to more than \$5 million in assets. Since 1998, our Foundation has provided over \$1.17 million in total funding support to the communities including more than \$280,000 in scholarships to organizations and students throughout the west shore of Lake Winnipeg.

Commented [RB1]: This will be updated with our most current information

Our Vision

To build a permanent fund to support not-for-profit groups in the areas of: The Environment, Heritage & Culture, Sport & Recreation, Community Services and Health & Education.

To build a permanent scholarship and bursary fund to assist students from the Foundation’s district in obtaining post-secondary.

Our Mission

By identifying and understanding our community’s needs, creating and maintaining partnerships that support effective solutions, and engaging and stewarding caring investors who fund our endowments and our grants, we are growing our entire community.

Our Values

Commitment – We give our time and energy to support the growth of our community foundation and, in turn, our entire community.

Thoughtfulness – We place effort into understanding our community's needs before making decisions and taking action.

Support – We provide assistance to the local charities and organizations that are helping our community grow.

Integrity – We follow a code of especially moral values, of honesty, and of accountability.

Courage – We persevere, in the face of challenges, as we undertake our work as a community foundation.

Inclusiveness and diversity – We invite participation by all members of our community, and actively seek their input and perspective in helping us achieve our goals.

Strategic Direction

The key strategic priorities of the WCF for the 2022 to 2025 period include the following:

1. **Connect and engage with community; donors; and recipients of grants and scholarships**, including:
 - a. Connecting with the community
 - b. Donor relations and engagement
 - c. Mentorship program for the granting process
 - d. Youth engagement – Age friendly – including all age groups
 - e. Reach – to geographical boundaries and to grant recipients, age groups, etc.
 - f. Fund Development – educating and raising public awareness of
 - g. Corporate sponsorship and support
2. **Embrace diversity on the board in our ESG-oriented* organizational culture (grants, scholarships, and on committees)** including:
 - a. Board inclusiveness/diversity
 - b. Scholarship inclusiveness and diversity
 - c. Scholarships focused on certain areas (of study or location, or by socio-economic or demographic criteria)
3. **Track endowed asset growth/restricted funds growth**

* ESG includes environmental, social and governance

This strategic plan addresses our current and anticipated future challenges, to continue to build on our vision of "Building a Lasting Legacy."

Human Resources & Board Development

Goal – Increase the diversity and inclusivity of the Board and its practices through the development of our current employee and Board members

Action Plans and Time Frames

A: Goal: Promote inclusivity and inform the public with respect to the day-to-day operations of WCF by creating two calendars for the use of the Board and/or the Public.

Timeline: The HRBD Committee intends to have tangible calendars complete by YE

B: Goal: Update and amend the existing WCF by-laws, which would replace out-of-date by-laws with new, concise practices/policies BY-LAW UPDATE

Timeline: The HRBD Committee would be prepared to move the new by-laws be adopted at the first Board meeting / AGM in January 2023.

C: Goal: Review the current practices at WCF and determine areas where we can better promote diversity and inclusivity.

Timeline: The commitment to diversity and inclusivity will be ongoing and has started now. If a Diversity/Inclusivity Officer is determined to be the best route, we would aim to have that person in place by YE 2022.

D: Goal: Update the new Board member binder to provide additional details of the WCF practices.

Timeline: This is the least urgent on the committee's priority list – it is to be completed by YE 2024.

E: Goal: Provide new educational or training opportunities to the Board to promote its knowledge and awareness of diversity, sensitivity, representation, and inclusion.

Timeline: Beginning in 2023, the HRBD would have a schedule in place for annual board development opportunities, such as a workshop or seminar, as well as ongoing development opportunities, such as sending links to articles or videos.

Finance Committee

Goal – Create an Operational Plan to ensure growth and responsible stewardship of WCF’s assets.

Action Plans & Time Frames

- A. **Goal: Measure WCF’s progress over time inform the planning and execution of efforts to protect and grow its assets** by collecting, tracking and reporting donor, granting and financial data to the Board.

Timeline: This will be an ongoing project beginning in 2022 and being refined each year.

- B. **Goal: Assess progress in achieving strategic goals** by developing and continually refining tools to analyze WCF’s asset growth, donor relations and granting success and thereby enabling the Board as a whole and individual committees to accurately make assessments and adjust strategies as needed.

This effort will include improvements to our new Analysis of WCF Donor and Granting Data Report and the Financial Committee’s Annual report.

Donor relations data and financial reporting will be enhanced by the adoption of an in-house accounting ability on the QuickBooks platform.

Timeline: This will be an ongoing project beginning in 2022 and being refined each year.

- C. **Goal: Gauge our progress towards achieving WCF’s endowed asset goal of \$8,000,000 by Dec 31, 2025** by tracking endowed asset growth on a quarterly basis.

Timeline: This will be an ongoing project beginning in 2022 and being refined each year.

- D. **Goal: Assist the Board in evaluating and improving the efficiency of the Foundation** by utilizing the Dashboard program to conduct quarterly progress reviews.

Timeline: This will be an ongoing project beginning in 2022 and being refined each year.

Granting Committee

Goal 1: Connect and engage with community; donors; and recipients of grants and scholarships

Action Plans & Time Frames

- A. **Goal: Identify three youth-related projects within the WCF catchment area** In partnership with local groups and organizations, and the Evergreen School Division.
Timeline: One project each in 2022, 2023 and 2024.
- B. **Goal: Raise awareness of WCF and our granting program** on an annual basis, using our website, social media and town hall sessions; through the creation, development and maintenance of a mentorship program to assist underserved communities of interest in the grant application process.
Timeline: Beginning in early 2023, annually thereafter.
- C. **Goal: Inform the general public and our donor base of the results of our annual grants** following our annual granting cycle, using our website, social media and mail outs.
Timeline: Regular social media posts about 2021 grant funded projects began in January 2022 and will be ongoing each year in the weeks leading up to and including the application intake period.
- D. **Goal: Create, maintain, and update the listings of all grant recipients, their charitable numbers, the amount of their grant, and the contact numbers for their Board of Directors** following our annual granting cycle, using our Donor Management System.
Timeline: YE 2022 followed by annual updates.
- E. **Goal: Develop and continually update a list of all youth related organizations and with their contact numbers within the WCF catchment area** on an annual basis.
Timeline: Complete the initial list by year end 2023 followed by annual updates
- F. **Goal: Produce a list of local organizations, within our catchment area, who have charitable status** to assist in our annual granting cycle and for use at any future granting meetings. This list would be continually updated.
Timeline: YE 2022 followed by annual updates.

Goal 2: Embrace diversity on the board in our ESG-oriented* organizational culture (grants, scholarships, and on committees)

Action Plan & Time Frame

- A. **Goal: Develop a communications strategy to ensure that our granting program is reaching underserved communities of interest.** Prior to our annual granting cycle, using our website, social media, and the print media.

Timeline: Identify underserved communities of interest by year end 2022.
Develop the communication strategy prior to the 2023 budget

Scholarship Committee

Goal – Connect with the Community to provide scholarships to students who have graduated from the Gimli High School and the Riverton Collegiate Institute. These students must be pursuing post-secondary education and have completed at least one year of studies at the education facility of their choice, high school, trade school and Red River Collegiate.

Action Plans & Time Frames

- A. **Goal: Ensure diversity of applicants and access to scholarships,** by reviewing the application process (in consultation with the schools) to focus on:

- Barrier-free application process for all students
- Including diverse areas of employment training including certifications in food handling courses, driver licensure, trades, business administration etc.

We will promote this initiative to the community, donors, applicants, businesses and schools via letters and social media

Timeline: Review current processes during 2022
Implement changes to processes 2023 – 2025
Review statistics annually to measure participation and feedback
Review percentages changes from baseline demographics compared to future levels annually 2023 onwards, and review outcomes by YE 2025.

- B. **Goal: Increase recognition and involvement of donors at our Donor Night,** in conjunction with the Events Committee by:

- Inviting a donor to speak at the Donor Night

Timeline: Trial in October 2023 and refine in future years.

Marketing and Website Committees

Goal – Ensure website is updated and relevant to connect with the community, engage with donors, engage with youth, support fund development, increase our coverage and reach, enhance corporate sponsorships, and enhance asset growth by:

Action Plans & Time Frames

A. **Goal – Ensure website is updated and relevant** by:

- Ensuring that the Administrative Coordinator is trained and able to update the website as required
- Focusing on stories and promoting donations all year long

Timeline: Ongoing beginning in 2022.

B. **Goal: Increase frequency of media releases and social media posts throughout the year** by:

- Positioning the Marketing Committee as the sole point of contact for all media releases, articles, and advertisements.
- Continuing social media posts with a focus on Facebook posts bi-monthly and more often when events are occurring.
- Focus on highlighting donations and funds.

Timeline: Ongoing beginning in 2022.

C. **Goal: Produce the WCF Annual Report for release by spring/summer of each year.**

Timeline: Annually beginning in 2022.

D. **Goal: Expand WCF's presence at community events** including the Icelandic Festival, Boardwalk Days, Friendship Days, etc. by:

- Working with the Administrative Coordinator to determine the best events to attend.
- Strategically attend to events to raise awareness and donations for WCF.

Timeline: Ongoing beginning Q2/Q3/Q4 of 2022.

E. **Goal: Support all events for WCF** including the golf tournament, New Year's Eve Gala, Giving Challenge, etc. by:

- Partnering with the events committee to ensure that all events are well advertised.
- Continuing to increase participation and engagement with all WCF events.

Timeline: Ongoing beginning Q2/Q3/Q4 of 2022.

F. **Goal: Increase corporate and individual sponsorships and support** by:

- Creating a sponsorship package.
- Engaging all board members to identify potential opportunities.

Timeline: Ongoing beginning Q2/Q3/Q4 of 2022.

Events Committee

Goal – Increase recognition of WCF and its sponsors at our events at our Donor Night, Golf Tournament and New Year’s Eve Gala.

Action Plans & Time Frames

A. **Goal: Increase recognition of donors at the Donor Night, in conjunction with the Scholarship Committee** by:

- Inviting a donor to speak at the Donor Night

Timeline: Trial in October 2023 and refine in future years.

B. **Goal: Increase and refine recognition process of community and corporate donations to our golf tournament** by:

- Reviewing processes and revising Thank You letters for the golf tournament
- Increase visibility and recognition of donors on website etc.
- Enhance visibility of donors at event through signage e.g. silent auction signs and posters

Timeline: Monitor participation and feedback by Fall 2023 and refine in future years.

C. **Goal: Increase recognition and involvement of donors at our New Year’s Eve Gala** by:

- Reviewing processes and revising Thank You letters for the New Year’s Eve Gala
- Increase visibility and recognition of donors on website, etc.
- Enhance visibility of donors at event through signage e.g. silent auction signs and posters

Timeline: Monitor participation and feedback by Fall 2023 and refine in future years.

Fund Development Committee

Goal: Increase the number of WCF donors and the diversity of endowed funds to expand our support of the WCF community through grants and scholarships.

Action Plans & Time Frames

- A. **Goal: Attract and educate our donors on all aspects of our Agency Funds and types of Endowment Funds Action Plan** by continuing to create content for the Fund Development pages of our website. The number of visits to this site will be tracked and evaluated.
Timeline: The number of visits to this site will be tracked and evaluated annually through to YE 2025.
- B. **Goal: Promote WCF using brochures, pamphlets, our granting process, our website and social media** working with the Marketing Committee to develop tools to assist the Board.
Timeline: To YE 2025.
- C. **Goal: Create fourteen (14) new Endowment Funds by YE 2025** working with donors.
Timeline: YE 2025.
- D. **Goal: Strengthen donor relationships and identify potential targets for new endowment funds** using with the Donor Management System to continually develop, update and maintain the methods of engagement and other ongoing stewardship efforts with existing donors.
Timeline: YE 2025.
- E. **Goal: Identify underserved communities and develop outreach plans to expand our reach in these areas** using with the Donor Management System to identify various patterns of donations, grants and scholarships.
Timeline: YE 2025.
- F. **Goal: Ensure an enhanced level of donor stewardship and donor retention** by formalizing and periodically revising standard operating procedures with regards to donor relations; donation processing timeliness; donor recognition; donor profile information; and reporting the results of grants and scholarships through effective donor communications.
Timeline: YE 2025.
- G. **Goal: Update and educate the Board on the array of endowment funds that we have and the ways that Directors can promote the growth of WCF's endowment assets** by maintaining an up-to-date listing and description of all endowment funds currently in force and, where possible to collect and preserve donor stories outlining the purpose and the motivation behind the creation of each endowment.
Timeline: YE 2025.



Strategic Planning

Goal - achieve the strategic goals of the WCF annually and by year-end 2025 by having a closely monitored Strategic Plan that acts as a framework for effectively organizing and motivating the activities of all WCF's committees.

Action Plans and Timeframes

- A. **Goal: Set clear and concise priorities for the WCF** and its Board and to summarize those goals into the Strategic Plan 2022 - 2025.

Timeline: Mar 23rd, 2022.

- B. **Goals: To assist all committees to review their progress towards achieving their annual strategic action plan goals** at least twice per year **and making progress towards their YE 2025 expected outcomes** (goals).

Timeline: July 15 and January 15th of each year.

- C. **Goal: To assist each committee chair to update their annual strategic action plans** during January – February of each year.

Timeline: Feb 28th of each year.