WALKING TOGETHER:
THE WINNIPEG FOUNDATION’S 2019-2021 STRATEGIC PLAN
WHO WE ARE

The Winnipeg Foundation is for good. Forever.

We help people give back to our shared community by connecting generous donors with causes they care about For Good. We’re an endowment-based public foundation, so gifts are pooled and invested, and the annual earnings are granted back to the community Forever.

Formed in 1921, we are proud to be the first community foundation in Canada. This planning period therefore marks a significant milestone not only for The Foundation, but also for the Canadian community foundation movement – as we will be celebrating our 100th anniversary in 2021.

We strive to be a catalyst for strengthening community well-being, now and for future generations, by promoting philanthropy, supporting diverse charitable organizations, and leading in partnership with our community.

WALKING TOGETHER

The Foundation values collaboration and it touches all aspects of our work. In setting a tone for the next three years, we have determined that we are walking together with all the communities we serve, during this time in our national history, which calls on each one of us to respond to and support healing and reconciliation.

Pan Am Place residents and staff.
OUR VISION

A Winnipeg where community life flourishes for all.

OUR MISSION

To be a catalyst for strengthening community well-being, now and for future generations, by promoting philanthropy, creating partnerships and supporting diverse charitable organizations. The Winnipeg Foundation fulfills this mission through:

• Donor engagement: Developing strong and meaningful relationships to advance causes donors hold dear and by honouring the legacies entrusted to the community through The Foundation.

• Grant-making: Making wise and effective distributions to meet community needs while respecting the wishes of donors.

• Leadership: Providing community leadership by recognizing opportunities to serve the public good and by supporting effective responses to local needs identified by charitable organizations.

• Financial stewardship: Maintaining the purchasing power of funds entrusted to The Foundation, achieving maximum returns consistent with prudent investment and assuring sound financial management practices so that the legacy created by the donor is respected in perpetuity.

• Communication: Providing information about our services and being publicly accountable for our decisions.

CORE VALUES

We Will:

• Be Accessible and Inclusive
  By welcoming diverse perspectives, voices and experiences.

• Be Respectful in our Relationships
  By collaborating with all organizations and individuals in a considerate and fair manner.

• Be Transparent, Accountable and Trustworthy
  By conducting our work in an honest and responsible manner.

• Be Innovative and Empowering
  By being creative and flexible in responding to the changing needs and challenges of the community by connecting people, ideas and resources.

• Be Transformative
  By recognizing and supporting opportunities to collaborate and lead with our community partners.
WHERE WE CAME FROM

The Canadian community foundation movement began in Winnipeg in 1921 when prominent banker William Forbes Alloway established The Winnipeg Foundation with a gift of $100,000. The Foundation’s second gift – three gold coins valued at $5 each – came in 1924 and cemented the belief that it is not the size of the gift that matters, but the act of giving. The Foundation’s first bequest came from Elizabeth Alloway, William’s wife.

Since then, The Foundation has seen incredible growth thanks to generous donors who choose to support the community through The Foundation. Our donors establish endowment funds, and these are pooled and invested to generate an annual revenue stream. This income must be distributed according to donors’ wishes. The Foundation is also experiencing an increase in flow-through gifts and this has an impact on total grants and distributions.

WINNIPEG TODAY

Winnipeg today is an exciting city. The population of our Metropolitan Area sits at more than 800,000. We are seeing new energy at locations such as The Forks and throughout our downtown, our vibrant arts, culture and festival scene continues to wow, and our professional and semi-professional sports teams are seeing great success.

However, there are many issues that continue to challenge our community. Reconciliation with Indigenous peoples requires major focus, as society aims to rectify more than 150 years of racist Canadian government policies and the anti-Indigenous sentiments held by many Canadians. Across Canada, Winnipeg has one of the highest levels of children living in low-income households. Our city is also welcoming an increasing diversity of newcomers who bring vitality but also require community support.

Manitoba still leads the nation with the highest number of tax filers making a gift to charity. However, there are fewer donors today and the percentage of tax filers claiming charitable donations has been steadily declining for the past decade. Fortunately, those who give are giving more. Finally, the way people give is changing, with many giving at the checkout or to timely emergencies such as natural disasters, and many younger donors especially, choosing to participate in non-traditional ways. Giving patterns and trends influence our work and we are mindful of giving changes that may affect The Foundation’s support to the community.
HOW WE DEVELOPED THIS PLAN

As we set our sights on helping create a sustainable city, country and planet, there are a number of influencers within this Strategic Plan.

While developing this plan, The Foundation relied on feedback from the community through our 2017 Winnipeg’s Vital Signs® report. This publication, released October 2017, presented a snapshot of life in Winnipeg as identified by citizens and supported by secondary research.

The report told us that while there is a general sense our city is doing well on many fronts, there are also areas that must be improved. The report identified four main areas of concern:

- RECONCILIATION
- BELONGING
- WELL-BEING
- LINES THAT DIVIDE

Reconciliation is a key priority for The Foundation. We recognize reconciliation is a journey that calls on each person and this experience will be different for everyone. We signed the Philanthropic Community’s Declaration of Action in 2015, and it, along with the United Nations Declaration on the Rights of Indigenous Peoples and the Truth and Reconciliation Commission (TRC) of Canada’s 94 Calls to Action, will continue to guide our work during this Strategic Plan. As an immediate response to Vital Signs’ findings, The Foundation will distribute $1 million to charities working towards reconciliation. We will use Vital Signs’ other findings to set priorities for activities and granting.

We also sought feedback from charitable agencies and we conducted additional research into the health of the charitable sector. Our report, Stressed, Stretched and Still Standing, issued April 2018, summarized our findings.

Finally, our Board and staff are in constant conversation with our donors and other community members who often express their concerns and aspirations for our city.
GOAL 1 – DEVELOP STRONG AND MEANINGFUL RELATIONSHIPS WITH DONORS

We are honoured when donors choose to make a difference through The Winnipeg Foundation. While all donors share our vision of creating ‘a Winnipeg where community life flourishes for all,’ each is unique in the way they want to achieve their philanthropic dreams and create their legacies.

TO ACCOMPLISH THIS GOAL, WE WILL:

OFFER CAUSE-BASED OPPORTUNITIES TO GIVE

In order to build more relationships, we will introduce a new accessible offering to help donors support the Causes they care about, in the ways and areas in which they want to be engaged. Designating one of the following Causes or a specific charity of choice offers a place for everyone who wants to support our community.

• Children, Youth and Families
• Literacy, Education and Employment
• Health, Wellness and Recreation
• Arts, Culture and Heritage
• Environment and Animal Welfare
• Community

MAKE ENDOWMENT BUILDING MORE ACCESSIBLE

We will lower the threshold for people to establish a named fund. Because many donors are interested in supporting broad community causes, we will introduce a new class of funds that focus on particular Cause areas of our grant-making activity. This will strengthen and diversify our donor base and increase The Foundation’s capacity to respond to grant applications.

UTILIZE COMMUNITY EXPERTISE TO SERVE ENDOWMENT BUILDERS

Whether it’s a one-time or repeat donor, a fund holder, or Legacy Circle member, we will strive to ensure our supporters’ philanthropic needs are met. We aim to connect with our donors in ways they prefer and so they can see the impact of their grant-making.
GOAL 2 – MAKE WISE, EFFECTIVE AND INSPIRING DISTRIBUTIONS

All distributions benefit our community and we support our community in many ways. We distribute grants in response to applications. We work with generous donors to support our community. We help students obtain an education. We aid charities to have a stable source of income they can rely on year after year. We support communities throughout our province to have thriving community foundations. And lots more.

TO ACCOMPLISH THIS GOAL, WE WILL:

DISTRIBUTE $140 MILLION IN COMMUNITY SUPPORT

Every dollar distributed has a positive impact on our community.

THIS MONEY WILL FLOW IN DIVERSE WAYS:

- **29%** RESPONSIVE GRANTS
- **24%** AGENCY AND DESIGNATED
- **20%** DONOR-ADVISED
- **9%** MANAGED
- **7%** MANITOBA COMMUNITY FOUNDATIONS
- **6%** LEADERSHIP PROJECTS
- **5%** SCHOLARSHIPS

MAKE IMPACTFUL DISCRETIONARY GRANTS

We pride ourselves on supporting a wide diversity of charities for projects of every size and type. While this philosophy will continue to influence our decision making, we will use findings in the 2017 Vital Signs report to reimagine and refocus our grants to ensure we are better working to create ‘a Winnipeg where community life flourishes for all.’ While we will continue to be a 360-degree grant-maker, some Cause areas will receive more support due to the priorities of our donors. To demonstrate impact of our grant-making, we will report back to the community on progress pertaining to our charitable causes.

EXPLORE INNOVATIVE WAYS TO SUPPORT COMMUNITY

We will investigate new models to invest in community projects and explore opportunities for social impact investing as they fit within our overall grant-making strategy.
GOAL 3 – BE A COMMUNITY LEADER

We recognize opportunities to serve the public good and support timely and effective responses to local needs. We believe that everyone benefits when we nurture the philanthropic environment in our city and province.

TO ACCOMPLISH THIS GOAL, WE WILL:

STRENGTHEN THE CHARITABLE SECTOR

The voluntary sector is comprised of hundreds of charitable and non-profit organizations and contributes significantly to the quality of life in our city. The Foundation’s State of the Charitable Sector report entitled Stressed, Stretched and Still Standing helped shine a light on the sector’s importance and vulnerabilities.

We will take specific steps to strengthen the sector by telling the story of its impact, providing more capacity-building grants, and continuing to emphasize our established Agency Fund program. We will continue to invest in youth engagement as a means of introducing the voluntary sector to the next generation. We will work with Professional Advisors to ensure they understand the importance of the charitable sector.

LISTEN, REFLECT AND LEARN ON OUR SHARED JOURNEY OF TRUTH AND RECONCILIATION

Relationship building across the entire community will always be an important emphasis for The Foundation. We will strengthen relationships with the Indigenous community.

Our grant-making will demonstrate an alignment with the goals of the United Nations Declaration of the Rights of Indigenous People and the Truth and Reconciliation Commission of Canada. Awarding the reconciliation grants inspired by Vital Signs will be one of our first acts during this Strategic Plan. We will also have extra resources available to support capacity building in Indigenous-led organizations.

We will demonstrate our commitment in our activities related to reconciliation with a comprehensive report at the end of the planning period.

CONVENE AND COLLABORATE

While knowledge is at the root of all good decision making, there are always divergent opinions on issues related to community well-being. Thoughtful decisions benefit from sharing perspectives. We will host a series of community conversations based on topics that emerged from Vital Signs. These Vital Conversations are intended to better inform ongoing decision making and build networks of shared interest as opposed to generating specific plans of action.
Manitoba is currently home to 55 community foundations, most of which have elected to be affiliated with The Foundation. Our financial support policies and formulas are well-established and appropriate. We will focus on technical support related to governance, strategic planning, marketing, professional development and back-office financial activities as well as supporting the new Provincial Heritage Trust initiative. We will enter 2022 with a much strengthened Endow Manitoba program.

The philanthropic habits of young people are changing. Engaging them in philanthropy and teaching them about the charitable sector is of value to society and will help foster a culture of generosity. We will continue our Youth in Philanthropy program and place continuing emphasis on our Summer Internship Program. We will also introduce the Walking Together Youth Reconciliation Grants.

Looking ahead to the next decade, we anticipate the United Nation’s 17 Global Sustainable Development Goals (SDGs) will become key measures of successful community development. Work will be necessary to explore and understand the alignment of Foundation activities. As a preliminary move during the 2019 to 2021 period, we will review our environmental footprint and augment our discretionary grant-making in support of environmental causes.

This planning period includes our 100th anniversary. Manitoba leads the nation in charitable giving and The Foundation exemplifies this long-standing tradition of generosity. We will plan a series of community activities in 2021 to celebrate the impact of philanthropy on our city and province.

Ma Mawi’s Youth in Philanthropy Committee.
GOAL 4 - ENSURE PERMANENCE OF THE FOUNDATION

The Foundation is built on the premise that we will support our community For Good. Forever. Our activities must ensure that future generations can always rely on the foresight and generosity of those who came before.

TO ACCOMPLISH THIS GOAL, WE WILL:

ENHANCE GOOD GOVERNANCE AND ORGANIZATIONAL EFFECTIVENESS

The Foundation will pursue Imagine Canada accreditation. This program requires up-to-date policies and practices in all areas of activity from planned giving, to the administration of scholarships and other endowments, to the maintenance of a succession plan. Such a wide-ranging review resulting in successful accreditation will provide a sound basis for entering our second century of community service.

EFFECTIVELY MANAGE HUMAN, FINANCIAL AND INFORMATION RESOURCES

We will use sound governance and investment policies, aim to attract and retain the best staff, ensure thorough succession planning, and maximize the use of technology. As part of our investment portfolio, we will monitor the environmental, social and governance (ESG) practices of the companies and businesses in which we invest.

DEMONSTRATE IMPACT THROUGH STRONG COMMUNICATIONS

Our community should understand the power of endowments, the value of legacies, and strength of working together. We will utilize a variety of communications across multiple platforms to relay stories of impact and the fact that philanthropy is for everyone.

RESPOND TO NEW OPPORTUNITIES

We expect to see not only a steady growth in the number of endowments but also changing expectations in best stewardship practices. We realize new opportunities may present themselves at any time. We will maintain the nimbleness and flexibility to respond.
HOW TO KNOW WE’RE ON THE RIGHT TRACK

This plan contains some strategic goals and specific outcomes that we can measure. In broader terms, we know we’re on the right track if we:

• Maintain public confidence and a trusted reputation for our soon-to-be 100-year-old community foundation.
• Strengthen our donor base and endowment funds in a climate that nurtures philanthropy in our city.
• Demonstrate sound financial management, transparent communications, and thoughtful grant-making.
• Build strong partnerships that foster collaboration and innovation and show a commitment to the health of the charitable sector.
• See the impact of our grant-making and community building work in the vitality of our city.

Scholarship recipient Chanse Kornik, with son Braxon.