



Niagara Community Foundation
2019-2023 Strategic Plan

5-Year Strategic Priorities and Three-Year Milestones

Approved by NCF Board: June 28, 2018



Niagara Community Foundation
5-Year Strategic Plan: 2019-2023

10-Year Vision, Strategic Priorities and Three-Year Milestones
Approved by NCF Board: June 28, 2018

Vision

Realizing community dreams through philanthropy.

Mission

The Niagara Community Foundation improves the quality of life in Niagara through philanthropy.

Guiding Principles

- **Put Niagara first:** We respond to Niagara's diverse communities by facilitating leadership, advancing local action, and promoting the region's unique story.
- **Philanthropic leadership:** We demonstrate expertise and provide leadership to help donors realize their philanthropic goals.
- **Invest strategically in the region:** With a focus on innovation, we leverage community knowledge to maximize impact through grants.
- **Connect, engage and inspire:** We collaborate with partners to foster positive and lasting social and economic change.
- **Maintain solid governance and operational excellence:** We implement transparent practices that are flexible, accountable and built on a foundation of respect, trust and integrity.

Ten-Year Vision for 2028

The measure of our worth is the leadership role we play and the impact we have in the communities we serve, as a grant maker, convener, connector and facilitator.

To this end, at a Board planning session on January 23, 2018, the Board of Directors of the Niagara Community Foundation created a longer-term ten-year vision to guide the Foundation's work over the next five years.

Over the next decade, as we work to achieve the following five vision outcomes, we will continue to focus on mission and impact while engaging stakeholders in addressing distinct community needs.

1. Community Philanthropy: Building a Legacy for Niagara

At the heart of our work, we engage citizens across Niagara to connect to their own sense of belonging and invite them to make meaningful contributions to their community. In the coming ten years, we will significantly increase our endowment funds to deepen our collective impact across the region.

We will continue to be a destination for donors looking to invest in Niagara. We will remain accessible by inviting donors of varying capacity and philanthropic goals to leave a legacy.

We will continue to play a leadership role by working with donors to respond to current and emerging needs. This involves expanding more deeply into Niagara's 12 municipalities as well as galvanizing existing relationships with major institutions and funders as partners and allies.

We will cultivate the next generation of philanthropists, supporters and volunteers to champion the importance of contributing time, talent and treasure. This will require a donor-centric approach to fundraising, resulting in more investments in a cross section of charities. This gives donors the flexibility to direct their support to our pool of *Field of Interest* funds, local Community funds and undesignated funds.

A focus on our brand recognition, visibility, and impact will help us to connect with those looking for a way to have local impact. We will also actively engage the region's evolving diverse demographics including youth, newcomers (including retirees to the area) and culturally diverse donors and supporters. Further, as we build our funds, this will allow for additional annual operating dollars that may be directed to achieve our operational needs to support our shared vision.

We will have access to current, timely and relevant knowledge that will inform and engage donors regarding philanthropic solutions that meet their charitable goals and community needs. We will be at the forefront with donors, professional advisors and community leaders in Niagara.

2. Strategic Investment: Strengthening Community Impact

We will continue to address the philanthropic challenges facing our community through grant making that strengthens existing services, responds to emerging needs and builds the capacity of the charitable sector throughout Niagara.

We will increasingly develop opportunities to partner with other donors, foundations, institutions, government and business to expand and strengthen its investments in collective impact and social finance. Together with our stakeholders, we will develop innovative investment strategies that tackle deeply entrenched and complex social problems including social impact investing.

We will continue to act as a key resource in Niagara for charitable governance, sustainability, and philanthropy. Recognizing how impactful this form of funding is for smaller charitable organizations in the region, we will continue to fund and facilitate relevant training and resources through grants to charities to enhance their organizational capacity and influence.

At the grassroots level, we will listen and respond to the needs of the philanthropic sector and our charity partners throughout the region.

3. Connecting Niagara: Influencing Positive Change

We will advance our role as a community connector and leader to intentionally address broader community issues. This work includes linking, convening and connecting people, ideas and community assets to mobilize change.

As a member of the Niagara Funders' Alliance, we will coalesce funder impact and leverage new funding and resource development opportunities for charities and charity sectors in the region.

We will also play a role in nurturing non-profit collaborations and supporting the broader community foundation movement through active engagement with other area community foundations as well as Community Foundations of Canada.

4. Demonstrating Impact: Sharing Donor Stories and Outcomes

To accomplish our mandate, we will increase our visibility, brand, and presence with key stakeholders through deliberate communication strategies, both traditional and online.

This includes sharing the impact our donors are having in the community. Leading-edge technologies will also be explored and utilized to engage more prospects, supporters and donors based on maximizing efficiency and a return on investment.

We aspire to be top-of-mind when people think of giving to endowments and building the long-term success of the community. We will steward and leverage our reputation as a respected, valued, and credible philanthropic leader.

5. Leading from Strength: Sustaining a Resilient and Adaptive Organization

We will continue to operate at the highest level of financial stewardship resulting in continued donor confidence, trust, and loyalty.

Leading with expertise, the Board will provide oversight to maintain excellence in governance, effective financial management, strategic investment, contingency planning, risk management, industry leading accreditation and policy best practices.

Growth will be supported through purposeful investment in our staff team in order to propel our operational work. Additionally, we will invest in the needed systems and structures to support efficiencies and maximize technology. This includes developing more data-informed evaluation, reporting and decision-making to continually improve our work and impact.

Strategic Priorities

1. Inspire philanthropy across Niagara
2. Amplify community impact
3. Build organizational strength and resiliency to support growth

Strategic Priorities

1. Inspire philanthropy across Niagara

- Grow our endowment fund
- Bolster the existing impact of Community Funds in each of the municipalities
- Expand the Niagara Fund to support greater community responsiveness
- Invite philanthropic participation from Niagara's emerging and evolving communities and groups

2. Amplify community impact

- Increase grant making and continue to support organizational capacity in Niagara's charitable sector
- Extend participation in social impact partnerships and initiatives
- Respond to emerging opportunities by connecting people, ideas, resources and community partners
- Build the Foundation's brand and presence in the community

3. Build organizational strength and resiliency to support growth

- Invest in and develop our people
- Strengthen organizational systems and facility
- Enhance the Foundation's evaluation processes to better measure impact

MILESTONES TOWARD SUCCESS			
1. INSPIRE PHILANTHROPY ACROSS NIAGARA			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Grow our endowment fund	Key professional advisors have the resources and tools to promote us and are actively connecting donors to the Foundation.	The number of professional advisors reached out to has increased and new donors have become fund holders.	The number of professional advisors reached out to has increased and new donors have become fund holders.
	Current fund holders, key stakeholders and potential future prospects are actively connected to and engaged in our work.	The total number of funds from current and new donors from emerging and evolving communities and groups has increased and the total endowment continues to grow.	The total number of funds from current and new donors from emerging and evolving communities and groups has increased and the total endowment continues to grow.
	The Make Your Mark campaign has been revamped for greater accessibility and uptake with donors able to give at a certain level.	A new giving initiative is underway and new fund holders are contributing to our Foundation according to their capacity.	This initiative is robustly subscribed to and has greater awareness and impact throughout the region.
	The Legacy Partners Program has expanded, resulting in more charitable organization funds.	The Legacy Partners Program continues to grow and engage more charities and more donors.	We become an option for donors interested in starting their own named endowment fund under the umbrella of the charitable organization fund.

MILESTONES TOWARD SUCCESS			
1. INSPIRE PHILANTHROPY ACROSS NIAGARA			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Bolster the existing impact of Community Funds in each of the municipalities	Local fund committees have been supported to implement local strategies that build visibility, demonstrate impact and grow their Community Fund. We have developed local communication strategies at the committee level.	Local fund committees are more active and local Community Funds have grown and are more visible in local areas.	Local fund committees are increasingly active and local Community Funds have grown and are visibly present in their municipality.
	We have deepened our relationships with elected officials and bureaucrats within the different municipalities.	Civic leaders, community champions, elected officials and bureaucrats have become more active with their Community Fund.	Our Community Funds are more embedded within those municipalities that have proactively grown them.
Expand the Niagara Fund to support greater community responsiveness	Strategies to rebrand the Niagara Fund have been explored and developed in an effort to invite those donors who are interested to give undesignated/emerging community responsive funds.	The Niagara Fund has been rebranded, rolled out to the community and has grown in size to meet community needs.	The Niagara Fund is growing and is being used to meet emerging needs in the community.

MILESTONES TOWARD SUCCESS			
1. INSPIRE PHILANTHROPY ACROSS NIAGARA			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Invite philanthropic participation from Niagara's emerging and evolving communities and groups	We have made our first round of grants to the Youth Philanthropy Initiative (YPI).	The YPI initiative is growing and expanding and more philanthropic work has been undertaken by youth. We are looking to expand our own participation in YPI and leverages more support for the initiative (e.g. local corporate partnerships).	The YPI program has experienced significant growth across the school boards and has a greater presence in more schools with more students.
	We undertake best practice research regarding engagement of culturally diverse communities in philanthropy and examines the feasibility of running a targeted pilot initiative. Our staff team participates in cultural competency training. We have integrated a culturally aware and inclusive approach to communications and branding.	Pending a successful research feasibility phase, we have implemented and tested a pilot that engages a specific community segment in a new philanthropic initiative.	We are evaluating the success of this pilot work with a goal to replicate the initiative in cooperation with other community groups.

MILESTONES TOWARD SUCCESS			
2. AMPLIFY COMMUNITY IMPACT			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Increase grant making and continue to support organizational capacity in Niagara's charitable sector	We are increasing the number and amount of granting to the community via our discretionary grants program.	We are increasing the number and amount of granting to the community via our discretionary grants program.	We are increasing the number and amount of granting to the community via our discretionary grants program.
	We have evaluated the first round of the David S. Howes Fund grants.	The David S. Howes grant fund program is fully subscribed and impact continues to be evaluated.	The David S. Howes grant fund program is fully subscribed and impact continues to be evaluated.
	The Centre of Excellence program is evaluated with input from partners. Based on feedback, the program is redesigned and piloted for greater accessibility and subscription.	Pending results of the redesign and pilot, we have rolled out a reconfigured version of the Centre of Excellence.	To be determined

MILESTONES TOWARD SUCCESS			
2. AMPLIFY COMMUNITY IMPACT			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Extend participation in social impact partnerships and initiatives	We have monitored and tracked the impact of our investment in the Community Forward Fund.	To be determined	To be determined
	We have explored social impact investment opportunities and has assessed our organizational readiness to participate in partnerships and initiatives.	We have determined how it might participate in social impact investments on a case-by-case basis (in alignment with our strategic priorities).	We have determined how it might participate in social impact investments on a case-by-case basis (in alignment with our strategic priorities).
Respond to emerging opportunities by connecting people, ideas, resources and community partners	We continue to respond to requests to participate in and/or lead initiatives to strengthen collaborative and charitable initiatives in the region. The impact and outcome of our participation of each of these initiatives will be measured.	We continue to respond to requests to participate and/or lead initiatives to strengthen collaborative and charitable initiatives in the region.	We continue to respond to requests to participate and/or lead initiatives to strengthen collaborative and charitable initiatives in the region.

MILESTONES TOWARD SUCCESS			
2. AMPLIFY COMMUNITY IMPACT			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Build our brand and presence in the community	Building on our existing communications strategy and plan, we will enhance our web-based and electronic communications to increase accessibility and engagement of stakeholders and the general public. We will also invest in new marketing and profile building opportunities to strengthen our presence in the region.	We continue to explore and utilize new emergent technologies and communication strategies that broaden its reach and impact. We continue to deepen our work in the area of communications and marketing and successfully target new audiences and donors to strengthen our presence in the region.	We continue to explore and utilize new emergent technologies and communication strategies that broaden our reach and impact. We continue to deepen our work in the area of communications and marketing and successfully target new audiences and donors to strengthen our presence in the region.
	We have an increased physical presence in the community through the participation of our leadership throughout the community.	We increasingly participate in community initiatives and are adding value through our leadership.	We increasingly participate in community initiatives and are adding value through our leadership.

MILESTONES TOWARD SUCCESS			
3. BUILD ORGANIZATIONAL STRENGTH AND RESILIENCY TO SUPPORT GROWTH			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Invest in and develop our people	We continue to prioritize relevant professional development training for our staff team. This includes cultural competency training. Staff has been increased to support growth. The staff team and Board remain agile and responsive to new trends and opportunities.	The staff team has grown incrementally and is supported to achieve our goals. The staff team and Board remain agile and responsive to new trends and opportunities.	The staff team has grown incrementally and is supported to achieve our goals. The staff team and Board remain agile and responsive to new trends and opportunities.
	The Board of Directors has received cultural competency training and has made a commitment to diversify its membership to reflect the demographic and cultural makeup of the Niagara region.	The Board's make up more actively reflects the diverse mosaic of Niagara's population.	The Board's make up continues to reflect the diverse mosaic of Niagara's population.
	We support the development and training of volunteers, as required. The Board of Directors continues to recruit, orient and develop skilled and competent directors.	Our volunteers are supported to succeed at their work. The Board of Directors continues to recruit, orient and develop skilled and competent directors.	Our volunteers are supported to succeed at their work. The Board of Directors continues to recruit, orient and develop skilled and competent directors.

MILESTONES TOWARD SUCCESS			
3. BUILD ORGANIZATIONAL STRENGTH AND RESILIENCY TO SUPPORT GROWTH			
Strategy	Year One January 1 to December 31, 2019	Year Three January 1 to December 31, 2021	Year Five January 1 to December 31, 2023
Strengthen organizational systems and facility	We evaluate the success, structure and systems of David Howes' grants to inform future granting.	Our granting process is effective and positions the organization for future major gifts.	Our granting process is effective and positions the organization for future major gifts.
	We have strengthened our internal systems for tracking data and outcomes.	We are able to track aggregate information more effectively.	We are able to track aggregate information more effectively.
	The Board of Directors continues to monitor operational, programmatic and reputational risk.	The Board of Directors continues to monitor operational, programmatic and reputational risk.	The Board of Directors continues to monitor operational, programmatic and reputational risk.
	We have strengthened processes to enhance communication between the Board and its various committees.	Committees are fully informed and apprised of the status of key decisions and strategies.	The Board's committee structure and communications processes are high functioning and creating synergy and common messaging.
	N/A	If/when required, we have explored relocating our facility to absorb increased staff growth.	We are in a space that meets all of our needs.

Enhance our evaluation processes to better measure impact	The staff has reviewed best practices around evaluating community foundations and devises a simple streamlined plan to measure some key metrics for all key areas of our work. The Board approves the proposed evaluation framework. Further, the Board annually assesses its impact and enhances its governance, as appropriate, to continually lead with excellence.	We have developed a simple score card/dash board that reports on key outputs and outcomes for the Foundation's work. Further, the Board annually assesses its impact and enhances its governance, as appropriate, to continually lead with excellence.	We are more effectively measuring and communicating its outputs, outcomes and impact to its stakeholders. Further, the Board annually assesses its impact and enhances its governance, to continually lead with excellence.
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