

## 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 Grants Committee to discuss Non Profit Meetings and potential changes to Spring Grants

Drafted the Emergency Covid-19 Focused Grants criteria and modified application form

Updated Grant Applications on website

### Bursaries

Discussed 2021 Bursary plans with PCI Career Counsellor

### Grant Analysis Complete

### Community Assessment In Progress

Community Assessment Report will be compiled using current available data

Met with (4) local non profits to discuss CFPD Grants and the impact the pandemic has had on their organization

### Grant Impact Storytelling In Progress

### Granting Priorities Not Started

## DECEMBER 2020 EXECUTIVE DIRECTOR REPORT

### 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

No Specific Update

#### Potential Board Member List Not Started

#### 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

Redesigned Foundation Feature Ads for Graphic  
Finalized Fund Development 2021 Budget  
Created all 150 Women Who Care 2021 material  
Ordered items for 150WWC Gift Box  
Test Run for Technology for 150WWC January 26<sup>th</sup>

### Social Media

**Current Stats** – Facebook 847, Instagram 520, Twitter 136

New & Exciting Things to Come post, Chamber Business Award Winners, 150 Women Who Care Save the Date post, 150WWC Accepting Applications, Community Futures Sponsor 150WWC, Ticket for 150WWC

### Continued Awareness & Marketing In Progress

#### Website

150 Women Who Care Application, 150 women Who Care Ticket information, CFPD Video, Annual Report, 25<sup>th</sup> Anniversary Art Project

#### Advertising

##### Radio

##### Portage Online

Print Foundation Feature: Fort la Reine Family Packages

Press Release 150 Women Who Care Virtual Event

### Recognized Community Leader In Progress

Met with Non Profits to discuss our role as a Community Leader

### Events Strategy Not Started

No Specific Updates

# DECEMBER 2020 EXECUTIVE DIRECTOR REPORT

## 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 December Bank Accounts & Credit Card  
Accounts Payables & Payroll completed  
December Tax Receipts completed on DonorPerfect  
Facilitated Security donation for Sunset Palliative Care  
Completed Fund Balance 2020 Review

## Operational

Staff Meetings each Tuesday at 9:30am  
Prepared for Executive Meeting January 7<sup>th</sup>  
Prepared for Grants Meeting January 14<sup>th</sup>  
Prepared for Fund Development Meeting January 19<sup>th</sup>  
Prepared for Investment & Finance Committee Meeting Jan 19<sup>th</sup>  
Prepared for Board Meeting January 19<sup>th</sup>  
Prepared for 150 WWC Committee Meetings Jan 21<sup>st</sup> & 28<sup>th</sup>  
Installed Meeting Owl in Boardroom  
Created 2021 Board Work Plan  
Prepared for meeting with City, RM & Library January 25<sup>th</sup>

### Operating Fund received the following in January 2021

• Southport Ad Sponsorship	\$ 288.75
• Government of Canada - CEWS	\$ 4,574.23
• City of Portage – Storefront Improvement Grant	\$ 447.00
• Manitoba Bridge Grant	\$ 5,000.00
• City Debenture Payment	\$ 7,409.98
• RM Debenture Payment	\$ 19,816.05

## Financial Capacity & Plans Complete

## Updated Technology Complete

Donor Perfect Integration Errors fixed  
DonorPerfect Training on Receipting & Online Forms  
Worked on procedures/processes for Donor Perfect

Progress:  Complete  In Progress  Overdue  Not Started

# DECEMBER 2020 EXECUTIVE DIRECTOR REPORT

## 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 BBBS to discuss Agency Fund options  
Launched 2021 Virtual 150 Women Who Care Event

### Donor Engagement Complete & In Progress

### Growth - Donations for January totaled \$3,065

#### \*New Fund

Smart & Caring Community Fund	\$135
Barbara Alice Beck Scholarship Fund*	\$2,500
Burnside Cemetery Fund	\$300
Ernie & Jocelyn Durand Fund	\$100
Duncan Family Fund	\$30
<b>Grand Total</b>	<b>\$3,065</b>

Progress:  Complete  In Progress  Overdue  Not Started

### Comparison from 2018, 2019 & 2020 for Monthly Donations

	2019	2020	2021
Jan	\$23,194	\$8,570	\$3,065
Feb	\$5,000	\$19,390	
Mar	\$1,932	\$6,771	
Apr	\$77,795	\$7,020	
May	\$5,040	\$6,955	
Jun	\$138,927	\$9,610	
Jul	\$21,808	\$15,921	
Aug	\$2,062	\$30,163	
Sep	\$31,116	\$74,262	
Oct	\$6,886	\$54,386	
Nov	\$40,746	\$66,300	
Dec	\$153,331	\$364,308	
<b>TOTAL</b>	<b>\$507,839</b>	<b>\$663,656</b>	<b>\$3,065</b>

### Reoccurring Giving Program Not Started

No Specific Updates

### Planned Giving Strategy In Progress

Attended CAGP Webinar on January 14<sup>th</sup>

Progress:  Complete  In Progress  Overdue  Not Started