



Strategic Plan 2023-2025

Prepared By

DO/ABLE

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Introduction

At Guelph Community Foundation (GCF), our hope is to leave our community greater, better, and more beautiful — through the contributions and leadership of those in our area. To this end, we support and promote endowments and donor services, grant making, and community leadership. At times this means bringing stakeholders together, taking collective action for community relief, and supporting critical shifts in our community.

Our strategic plan for 2023-2025 has been developed with stakeholder insight, careful analysis, and the efforts of volunteers, staff, and members of the board. **This is our plan for building back** at a time when the needs in our community are deeper, people want to contribute to recovery, and there will be significant change.

Our Strategic Planning Process



Key Issues in Our Environment

<i>Engagement — centred around clear vision and tangible issues and impact — is paramount</i>	<i>Social justice, equity, diversity, inclusion, and reconciliation, are imperative in our work and in the community</i>
<i>Revenue and financial capacity in the nonprofit sector will be fragile in the coming years</i>	<i>Needs in the community are increasingly complex, entrenched, and growing — and require new and collaborative approaches</i>

Our Path Forward

In view of the issues facing our organization, GCF is committed to 3 broad actions:

- We will meaningfully and inclusively engage donors, grantees, and community members — and align our communications, granting, and fundraising to respond to community needs.
- We will integrate diversity, equity, inclusion, and reconciliation into all of our work and relationships, and adapt our philanthropic work to optimize our results and align them to our environment.
- Internally, we will strengthen the culture that we need to adapt and succeed, build a team that reflects our community, and streamline and align our processes to advance our most strategic objectives.

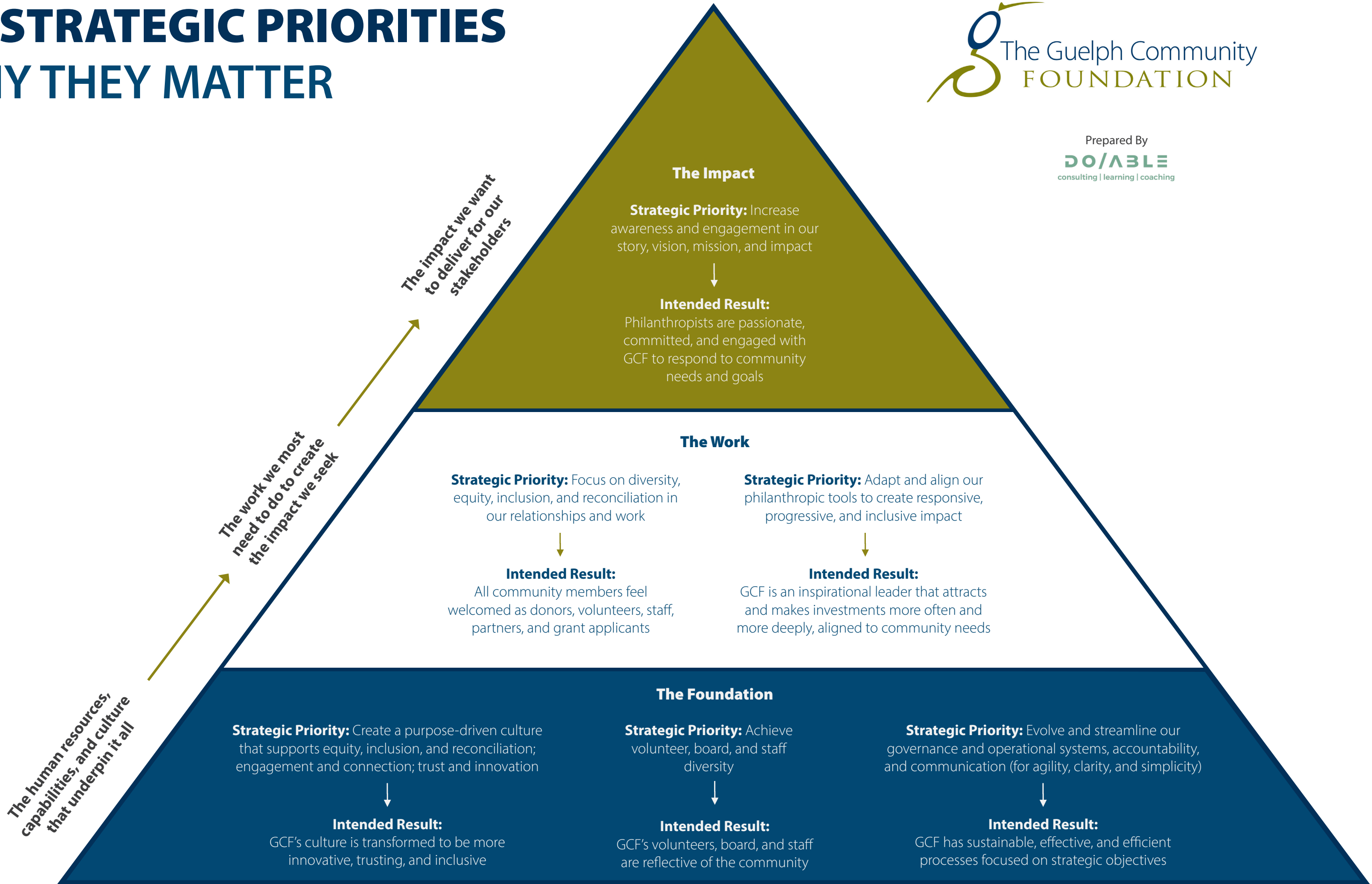
Our strategic plan will ensure that we are engaged with a strong and expanding base of stakeholders; highly reflective of the community; and positioned to adapt and deliver results responsively.



OUR STRATEGIC PRIORITIES & WHY THEY MATTER



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THE FOUNDATION

The human resources, capabilities, and culture that underpin it all

Our Strategic Priorities	Our Intended Results	Our Projected Milestones for Adaptive Implementation (2023 - 2025)		
Create a purpose-driven culture that supports equity, inclusion, and reconciliation; engagement and connection; trust and innovation.	GCF’s culture is transformed to be more innovative, trusting, and inclusive.	<div>2023</div> <div>Q1 — develop methodology to assess culture</div> <div>Q2 — develop internal communication plan to build trust and connection</div> <div>Q3 — assess staff and volunteer team cohesion and sense of connection</div> <div>Q4 — develop a culture development plan (targets, tactics, metrics)</div>	<div>2024</div> <div>Q1/ Q2 — evaluate and adjust communication plan</div> <div>— implement culture development plan</div> <div>Q3/ Q4 — assess culture and cohesion; name issues, and set targets for 2025 plan</div>	<div>2025</div> <div>Q1/ Q2 — adjust and implement culture development plan</div> <div>Q3/ Q4 — assess culture and cohesion; name issues, and set targets for 2026 plan</div>
Achieve volunteer, board, and staff diversity.	GCF’s volunteers, board, and staff are reflective of the community.	<div>2023</div> <div>Q1 — increase understanding of who is in the community</div> <div>Q2 — develop a recruitment and retention process</div> <div>Q3 — implement recruitment and retention processes in all cohorts (i.e., volunteers., staff, etc.)</div> <div>Q4 — evaluate effectiveness of recruitment and retention processes</div>	<div>2024</div> <div>Q1/ Q2 — modify and calibrate recruitment and retention processes</div>	<div>2025</div> <div>Q1/ Q2 — modify and calibrate recruitment and retention processes</div>
Evolve and streamline our governance and operational systems, accountability, and communication (for agility, clarity, and simplicity).	GCF has sustainable, effective, and efficient processes focused on strategic objectives.	<div>2023</div> <div>Q1 — evaluate and update current Vision, Mission and Values and bring them into alignment with the strategic plan</div> <div>— define roles</div> <div>Q2 — increase understanding of best practices, metrics, and staff and volunteer asset ratios</div> <div>Q3 — identify what to stop doing by engaging stakeholders (i.e. what do they care about?)</div> <div>Q4 — create a professional skills development plan</div>	<div>2024</div> <div>Q1/ Q2 — set annual governance workplan in part based upon stakeholder priorities</div> <div>— set annual operational workplan in part based upon stakeholder priorities</div> <div>— critically review and seek to reduce and streamline governance and operational workplans</div> <div>Q3/ Q4 — monitor, critically assess, and seek to reduce and streamline governance and operational workplans and processes where governance and operations meet</div>	<div>2025</div> <div>Q1/ Q2 — evaluate governance model to ensure the model is on track to reflect best practices in nonprofit governance</div>

THE WORK

The work we most need to do to create the impact we seek

Our Strategic Priorities	Our Intended Results	Our Projected Milestones for Adaptive Implementation (2023 - 2025)		
Focus on diversity, equity, inclusion, and reconciliation in our relationships and work.	All community members feel welcomed as donors, volunteers, staff, partners, and grant applicants.	<div>2023</div> <div>Q1 — identify underrepresented groups using data (e.g. Vital Signs) and link to the stakeholder communication and engagement strategy</div> <div>Q3 — continue internal engagement surveys and determine areas for improvement</div> <div>Q4 — determine areas for improvement in granting practices that support enhanced diversity, equity, inclusion, and reconciliation</div>	<div>2024</div> <div>Q1/ Q2 — develop an internal engagement plan incorporating diversity, equity, and inclusion</div> <div>— incorporate improvements in granting practices that support enhanced diversity, equity, inclusion, and reconciliation</div> <div>Q3/ Q4 — monitor stakeholder engagement and communication strategy metrics to assess gaps in who is engaging with GCF</div>	<div>2025</div> <div>Q1/ Q2 — complete an analysis of GCF donors</div> <div>Q3/ Q4 — begin targeted marketing to address gaps in the donor base</div> <div>— identify a diversity, equity, and inclusion lens for GCF's next project</div>
Adapt and align our philanthropic tools to optimize our impact and suit our environment.	GCF is an inspirational leader that attracts and makes investments more often and more deeply, aligned to community needs.	<div>2023</div> <div>Q1 — publish Vital Signs</div> <div>Q2 — identify key community priorities (i.e. focus areas and needs, based in part on Vital Signs and stakeholder input from the stakeholder communications and engagement strategy)</div> <div>Q3 — consult with applicants regarding a trust-based granting methodology</div> <div>Q4 — update the responsible investing policy</div> <div>— set investing and granting priorities (linked to key community priorities and GCF community-focused leadership strategy)</div>	<div>2024</div> <div>Q1/ Q2 — establish and report KPIs for granting and funds</div> <div>• number of donors</div> <div>• total amount of funds (\$)</div> <div>• increase in number of funds</div> <div>• number and total amount (\$) of representative grants</div> <div>Q3/ Q4 — provide Vital Briefs (minimum of once per year)</div> <div>— establish a granting methodology using a trust-based, philanthropic lens framework</div> <div>— assess impact of Bill C-19 to endowment model; determine any necessary changes</div>	<div>2025</div> <div>Q1/ Q2 — implement any changes to endowment model as necessitated by Bill C-19 (if applicable)</div> <div>— be present at tables that focus on major community initiatives</div> <div>Q3/ Q4 — work as a systems leader to identify and support Guelph's next big project</div> <div>— support collaborations between grantees, where aligned with GCF community-based leadership themes</div>

THE IMPACT

The impact we want to deliver for our stakeholders

Our Strategic Priorities	Our Intended Results	Our Projected Milestones for Adaptive Implementation (2023 - 2025)		
Increase awareness and engagement in our story, vision, mission, and impact.	Philanthropists are passionate, committed, and engaged with GCF to respond to community needs and goals.	2023	2024	2025
		<div><div>Q1</div><div><div>—</div><div>develop an ongoing communication (broad) and engagement (focused) strategy, with defined stakeholder streams, goals/targets, tactics, and measures</div></div><div><div>—</div><div>establish a snapshot method for annually evaluating GCF stakeholder engagement levels (include measures for relationship, donor, partnership, etc.)</div></div></div> <div><div>Q2</div><div><div>—</div><div>begin implementing a regular, ongoing stakeholder communication and engagement strategy</div></div></div> <div><div>Q3</div><div><div>—</div><div>continue the regular, ongoing stakeholder communication and engagement strategy; take stock of results quarterly</div><div><div>—</div><div>assess input from stakeholders identifying the community issues, aligned with Vital Signs, which they believe GCF should focus on in 2024 and 2025</div></div></div><div><div>Q4</div><div><div>—</div><div>continue the regular, ongoing stakeholder communication and engagement strategy; take stock of results quarterly</div><div><div>—</div><div>identify 1-2 themes per year for community-focused leadership in 2024 and 2025 (using both Vital Signs data and stakeholder input)</div><div><div>—</div><div>establish a practical model and plan (tactics, goals, measures) for aligning fundraising, granting, and information & reporting activities (corresponding to GCF’s community-focused leadership themes)</div></div></div></div><div><div>Q1/ Q2</div><div><div>—</div><div>continue the regular, ongoing stakeholder communication and engagement strategy; take stock of results quarterly</div><div><div>—</div><div>take annual snapshot (measurement) of GCF stakeholder engagement levels</div><div><div>—</div><div>implement the model for aligned fundraising, granting, and information & reporting activities (corresponding to GCF’s 2024 community-focused leadership themes)</div></div></div></div><div><div>Q3/ Q4</div><div><div>—</div><div>continue the regular, ongoing stakeholder communication and engagement strategy; take stock of results quarterly</div><div><div>—</div><div>implement the second half of the annual aligned fundraising, granting and information & reporting plan</div></div></div></div><div><div>Q1/ Q2</div><div><div>—</div><div>ontinue the regular, ongoing stakeholder communication and engagement strategy; take stock of results quarterly</div><div><div>—</div><div>take annual snapshot (measurement) of GCF stakeholder engagement levels</div><div><div>—</div><div>implement the model for aligned fundraising, granting, and information & reporting activities (corresponding to GCF’s 2025 community-focused leadership themes)</div></div></div></div><div><div>Q3/ Q4</div><div><div>—</div><div>continue the regular, ongoing stakeholder communication and engagement strategy; take stock of results quarterly</div><div><div>—</div><div>implement the second half of the annual aligned fundraising, granting and information & reporting plan</div></div></div></div></div></div></div></div>		

