



# BUILDING MORE EFFECTIVE PHILANTHROPY

OAKVILLE COMMUNITY FOUNDATION  
2016-2018 STRATEGIC PLAN HIGHLIGHTS



In 2015, The Oakville Community Foundation developed a three-year Strategic Plan rooted in the values of leadership, collaboration, knowledge & innovation, integrity and respect. We are focused on building more effective philanthropy in Oakville and have established specific goals in four strategic areas:

## STRATEGIC PRIORITIES 2016 - 2018

1. Effective Philanthropy
2. Stability & Growth
3. High Performance Organization
4. Community Impact

The Foundation will engage the community in a discussion regarding how we can collaboratively create more effective philanthropy to realize the potential of every resident. How does the charity sector transform itself if it is going to transform the lives of people in need?



## 1. Building Effective Philanthropy

**GOAL: Lead the development of collaborative solutions for four important local issues**

Oakville's Vital Signs® 2015 Report identified four Pillars:

- Bridging The Equity Gap
- Housing For Everyone
- Better Mental Health
- From Diversity To Inclusion

We are facilitating, coordinating and accelerating consultations, research and collaborative solutions between all sectors to identify solutions that will create real change in our community.



## EXAMINING THE SOCIAL IMPACT OF OUR INVESTMENTS

We're reviewing socially responsible investment practices and principles to determine how to assess the social impact of our investment strategies.

## 2. Stability & Growth

### **GOAL: Build Endowment Funds for future needs**

We are deepening relations with our current Fundholders and growing relationships with a new group of diverse Fundholders.

### **GOAL: Mitigate risk while maximizing investment returns**

We are reviewing our investment mix and considering investment classes that will maximize returns and reduce costs while managing risk.

### **GOAL: Align our business model for stability and fund growth**

We're taking a close look at our business model to ensure it meets our goals of protecting against erosion of capital while maximizing distribution of funds to charities over time.

## 3. High Performance Organization

### **GOAL: Review internal investment processes**

We are reviewing The Foundation's investment process to reduce the risk profile and enhance oversight of the investment portfolio.

### **GOAL: Make optimal use of our financial and human resources**

We are making changes to:

- Enhance our use of technology
- Streamline processes and improve effectiveness of governance and decision-making
- Support and develop our team to manage future growth, aligning roles with Strategic Priorities
- Evaluate our existing space for maximum effectiveness

## 4. Community Impact

### **GOAL: More than double local granting and initiatives by 2018**

We're accelerating support of the growth and vitality of our community, doubling granting to \$3 million by 2018. We're also helping donors to better understand the local funding opportunities.

### **GOAL: Increase the share of our dollars that stay locally**

We are focused on increasing Fundholder's local granting by 3% each year, to achieve a total of 80% by 2018.

### **GOAL: More than double the potential funding offered to charities while making access easier**

We're increasing maximum grant amounts per charity; individual charities can now apply for up to \$10,000 (up from \$5,000) and charities working in partnership can qualify for \$20,000 or more.

#### **Also:**

- Charities can submit more than one grant request, such as for a single and partnership grant.
- We now offer funding for Operating needs
- We have streamlined the application process to a single stage.



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## ABOUT THE OAKVILLE COMMUNITY FOUNDATION

The Oakville Community Foundation is a conduit between the passions of philanthropic families and organizations, and the needs of the community - making Oakville a better place to live, work, learn and grow. We support individuals, families and corporations who come from all walks of life, economic backgrounds and charitable interests but they have one thing in common - a desire to make a difference today and leave a legacy tomorrow for Oakville - a desire to be part of a smart & caring community.

**VISION:** Build a healthy, vital community where everyone has a sense of belonging, and the opportunity to connect, contribute and realize their potential.

**MISSION:** Invest the generosity of caring residents to build opportunity for generations.

**VALUES:** Leadership, Collaboration, Knowledge & Innovation, Integrity, and Respect

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The Oakville Community Foundation is a proud member of our National Organization, Community Foundations of Canada

