



# Strategic Plan

August 2026 - July 2029

## Letter from the Board Chair and Executive Director

We are excited to share our new Strategic Plan for 2026 to 2029, a roadmap that reflects both the remarkable progress we have made and our vision for the future.

Founded in 2001, the Perth and District Community Foundation (PDCF) is one of over 200 community foundations across Canada. PDCF is a charitable public foundation working to strengthen community in Perth, the Lanark Highlands, Drummond/North Elmsley and Tay Valley Townships.

Over the past five years, PDCF has grown significantly, in capacity, in impact, and in the trust placed in us. We have invested in ourselves, strengthened our systems, and deepened our relationships across the region. We have earned a reputation as a convener, a collaborative partner, and a champion for community-led solutions. This plan builds on that foundation. It reflects our commitment to supporting diverse organizations and causes while embracing emerging opportunities in responsible investing, Non-Qualified Donee (NQDs are grant recipients that are not registered charities) support, and grassroots initiatives. It marks our evolution toward trust-based philanthropy, an approach that empowers rather than directs, and prioritizes listening alongside leading.

Developed through thoughtful dialogue with our Board and staff, this plan balances aspiration with realism. We recognize the ongoing pressures facing our community, including homelessness, food insecurity, climate change, mental health and addictions, and needed support for youth and families, and we are committed to responding with both agility and intention. At the same time, we acknowledge our own capacity as a small but mighty organization, and the importance of solidifying what we have built before taking on too much new work.

The three strategic directions in this plan—**Strengthen Community, Grant for Impact, and Inspire Giving**—represent our core work in the community. These directions rest on a strong foundational capacity that ensures we have the organizational systems, structures, and sustainability to deliver on our commitments. This flexible approach will guide our decisions while allowing us to adapt to emerging needs and opportunities.

We are grateful to our donors, grantees, partners, and community members who have helped shape the Foundation into who we are today. Together, we are building a community where everyone belongs and thrives. Not just today, but for generations to come.

Yours in community building,

*Shannon Baillon*

Board Chair

*Victoria Gibb-Carsley*

Executive Director

## About The Perth and District Community Foundation

The Perth and District Community Foundation is a vital force for good in our region, connecting people, resources, and ideas to build a stronger, more inclusive community. As a community foundation, we manage endowment funds and distribute grants to local organizations addressing a wide range of needs, from arts and culture to social services, housing, recreation, and environment.

What makes us unique is our role as a non-partisan facilitator. We are a trusted hub that brings diverse sectors together, fosters collaboration, and amplifies community-led solutions. We serve as a connector, convener, and catalyst for lasting change.

Our work is grounded in deep community connections and a commitment to [Trust-Based Philanthropy](#). We believe in empowering organizations and individuals, and in building networks that will endure long into the future.

## Our Purpose and Values

Our purpose and values are the foundation upon which we operate and the compass that guides our work. During our strategic planning process, we reviewed and refined both to ensure they continue to reflect who we are and the work we want to do moving forward.

### Our Purpose

Perth and District Community Foundation builds and strengthens community so that everyone belongs and thrives, today and into the future.

### Our Guiding Values

#### **Belonging** (*equity, inclusion, justice*)

We are committed to creating a community where everyone belongs. We embrace diverse voices, experiences, and perspectives, and work to address inequities and empower those who have been marginalized or underserved.

#### **Community** (*connection, collaboration, continuity*)

We believe in the power of connection and collaboration. We bring people and organizations together, foster meaningful relationships, and work to ensure continuity by building lasting impact that will endure for generations.

#### **Heart and Humanity** (*empathy, compassion, care*)

We lead with empathy and compassion, recognizing the inherent dignity and worth of every person. We approach our work with kindness, understanding, and a genuine commitment to the well-being of our community.

#### **Integrity** (*respect, trust, transparency*)

We act with professionalism, transparency, and accountability, earning the respect and trust of donors, grantees, and community members.

### **Stewardship** (*responsibility, sustainability, impact*)

We are responsible stewards of the resources entrusted to us. We manage funds with care, invest thoughtfully for long-term sustainability, and measure our work by the lasting, positive impact we create in our community.

## **Our Strategic Directions**

Guided by our purpose and values, we have established **three strategic directions** to direct our work over the next three years, from 2026 to 2029.

These directions are intentionally designed to be broad and flexible, allowing us to adapt and navigate emerging needs and opportunities, while ensuring we can direct our energy and resources where they are needed most.

### **Strengthen Community**

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*As a trusted convener, we strengthen connections, capacity, and the collective power of the community, actively building bridges across divides and addressing shared challenges.*

#### **Goal**

Deepen the foundation's role as a trusted community builder and connector: convening dialogue, building organizational capacity, supporting reconciliation, and investing in priorities that build a thriving community.

#### **Objectives & Outputs**

1. **Build the capacity of community organizations** and the broader community through workshops, learning opportunities, and by actively convening community conversations.
2. **Deepen Reconciliation efforts** as a deliberate organizational commitment, including more active participation and partnerships with Indigenous communities and organizations.
3. **Capture and share community stories and impact** through Vital Signs and storytelling to build shared memory, celebrate community success, and raise the Foundation's profile.
4. **Formalize partnership agreements** with clear roles, expectations, and mutual accountability mechanisms for collaborative initiatives.

#### **Success Indicators / Outcomes**

By 2029, PDCF aims to have completed the following:

- Reached new and underserved areas of the community
- Established new relationships including formal partnerships
- Recognized in the community as a trusted convener

- Deepened relationships with Indigenous partners through joint initiatives
- Increased community awareness of our role and impact

## Grant for Impact

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*We provide impactful grants that support local organizations, empower grassroots initiatives, and respond to evolving community needs. We offer flexible, supportive funding relationships that range from large multi-year grants to small micro-grants and are committed to supporting a broad and diverse base of recipients.*

### Goal

Provide flexible, trust-based granting that responds to community needs, supports non-traditional recipients, and empowers grassroots initiatives.

### Objectives & Outputs

1. **Map community needs, gaps and emerging priorities** using Vital Signs and other data sources to inform donors and to guide granting decisions.
2. **Expand access to funding by offering micro-grants, additional scholarships, and support to Non-Qualified Donees (NQDs)** to reach underserved groups and community-led initiatives.
3. **Explore the possibility of future community impact investing opportunities** such as loans for affordable housing initiatives, real estate purchase for use by community organizations, etc.
4. **Review, update, and communicate a clear granting evaluation framework**, that incorporates an equity lens, and includes rubrics for selection, definitions of positive societal impact, and criteria for encouraging fair wages in grantee budgets.
5. **Ensure granting levels are sustainable** by regularly assessing fund balances, investment performance, and community needs to maintain long-term impact.

### Success Indicators / Outcomes

By 2029, PDCF aims to have completed the following:

- Provided more funding to a broader range of grant recipients
- Increased confidence in the assessment of grant applications
- Grantees highly satisfied with the granting process
- Community priorities identified in Vital Signs clearly reflected in granting decisions
- Documented examples of grassroots and community-led initiatives supported through granting

## Inspire Giving

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*We inspire diverse donors, grow endowments, and steward meaningful relationships rooted in shared values and community belonging. Our donors are partners in community change. We*

*are committed to broadening and deepening our donor base, stewarding existing relationships with care, and exploring innovative giving models that invite broader community participation.*

### Goal

Grow a diverse, engaged, and sustainable base of donors and fund holders whose giving is rooted in shared values and genuine community belonging.

### Objectives & Outputs

1. **Develop and implement a donor stewardship strategy** that provides ongoing recognition, meaningful communication, and relationship-building for new and existing donors.
2. **Diversify and engage a broader donor base** by creating materials and approaches tailored to different generations and giving motivations, exploring legacy giving and planned giving, and supporting stock donations.
3. **Expand revenue streams** by pursuing external flow-through funding, building agency funds, and growing unrestricted and restricted fund balances.
4. **Integrate fund development, community development, and capacity-building** into a unified strategy that reinforces the Foundation's broader community purpose. As part of this, ensure Board members and staff have the tools to be effective advocates for the organization.

### Success Indicators / Outcomes

By 2029, PDCF aims to have completed the following:

- Increased assets under management (endowed funds)
- Expanded donor base
- Increased number of donors giving monthly
- Increased donor loyalty
- Increased community giving
- New agency funds established
- Donors consistently report increased awareness of PDCF's convening role and impact in the community.
- Board members are equipped to be effective ambassadors and advocates for the Foundation
- Increased understanding of PDCF donors' motivation for giving.

## Strengthening our Foundational Capacity

Our three strategic directions can only be effective if they rest on a strong organizational foundation. As a small and growing organization with a working board, we are committed to investing in our own capacity, systems, and sustainability.

The following commitments represent our dedication to being a resilient, future-ready organization built to lead. By investing in people, strengthening governance, and improving

systems, we create a stable foundation that positions the Foundation to evolve, adapt, and lead with confidence.

Our foundational priorities for this strategic planning cycle:

1. **Enhance ongoing professional development of staff and board members**, including training in trust-based philanthropy, equity and inclusion, responsible investing, and emerging trends in community foundation work.
2. **Strengthen organizational resilience** through succession planning, updated job descriptions and updated policies to ensure roles reflect the needs of the organization.
3. **Develop a detailed investment policy** that addresses responsible and impact investing principles, ensuring long-term sustainability.
4. **Improve technology, systems, and communications infrastructure**, including the Foundation's website, Customer Relationship Management platform, grant management platform, and a communications strategy to improve efficiency, transparency, and to clearly articulate impact.

### Success Indicators / Outcomes

By 2029, PDCF aims to have completed the following:

- Completed succession plans and updated job descriptions
- Updated board investment policy
- Organizational policies reviewed and updated on a rotating basis
- Increased engagement with the website and social media tools.
- Communications strategy developed and implemented, including digital and non-digital approaches
- Board successfully attracted diverse candidates with needed skills and attributes, who actively promote PDCF.
- Strong financial stability and reserves
- Staff report sustainable staff workloads
- Improved operational efficiency, transparency and the ability to clearly articulate impact.

## Plan Implementation and Monitoring

As a small organization with a working board, prioritizing our work and monitoring our capacity is essential. Each year, the Board and staff will develop operational plans and committee workplans that identify priority objectives from each strategic direction as well as foundational commitments. This flexible approach allows us to respond to emerging opportunities while maintaining strategic focus.

To ensure the successful implementation of our strategic priorities, the Board of Directors and Executive Director commits to the following actions:

1. **Develop annual operational plans / committee workplans** that identify goals, objectives, key measurements, timelines, resources, and roles and responsibilities, and allocate budget resources aligned with the 3 strategic directions and foundational

capacity during the annual budget development process.

2. **Monitor and measure effectiveness** of committee workplans and capacity through reports to the Board that track key metrics, milestones, and challenges.
3. **Use the Strategic Plan to guide decision making** when opportunities and challenges arise, ensuring alignment with our purpose and values.
4. **Communicate progress of strategic directions** on a regular basis to the Board, donors, grantees, and community partners.
5. **Complete an annual review of the strategic plan**, assessing progress of strategic directions and adjusting objectives, strategies and staffing levels as needed. Ensure changes are reflected in annual workplans and budgets.