

Understanding Manitoba's Community Foundations

Preliminary Analysis

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Presented at
Community Foundations of Canada Regional Meeting
April 2009



Overview of Presentation



- Description of Project
 - Research Approach
- Overview of Preliminary Findings
 - Canada Revenue Agency Taxation Data
 - Community Foundation Survey
- Moving Forward



Project Description



- Aim of project is to understand the diversity that exists among Manitoba's 41 community foundations
- Seeking to achieve an increased understanding of community foundations, their organizations, their structures, their endowments, their community grants, and local benefits
- Information generated will assist community foundations, government policy and programming, and academic institutions concerned with community development



Research Approach



- Multi-research approach to generate a comprehensive understanding of community foundations
 1. Community Foundation Survey
 - 29 completed surveys received as of 21 April 2009
 2. Follow-Up Interviews
 3. Canada Revenue Agency Taxation Data
- The findings presented in this presentation are preliminary
 - Presented for discussion purposes
 - Findings may change with receipt of additional information.



Participating Community Foundations



- Beautiful Plains Community Foundation Inc.
- Big Grass Community Foundation
- Brandon Area Community Foundation
- Brokenhead River Community Foundation
- Carberry and Area Community Foundation Inc.
- Carman Area Foundation
- Cartwright & Area Foundation Inc.
- Community Foundation of Portage and District Inc.
- Community Foundation of Swan Valley Inc.
- Dauphin & District
- Glenboro Area Foundation Inc
- Interlake Community Foundation
- Minnedosa & District Foundation Inc.
- Morden Area Foundation
- North Norfolk-MacGregor Foundation Inc.
- Northern Neighbours Foundation
- Oak Lake & Area Foundation
- Plum Coulee Community Foundation
- Reston & Area Foundation
- Selkirk & District Community Foundation
- Souris Glenwood Community Foundation
- The Boissevain & Morton Foundation Inc.
- The Killarney Foundation Inc.
- The Steinbach Community Foundation
- The Virden Area Foundation Inc.
- The Winkler Community Foundation
- Thompson Community Foundation
- Wawanesa Foundation
- Westshore Community Foundation

Preliminary Findings – Canada Revenue Agency



- Preliminary information included on the following topics:
 - date of community foundation registration
 - primary areas of activities
 - total assets
 - growth of total assets
 - amount of tax receiptable gifts
 - amount of gifts to qualified donees



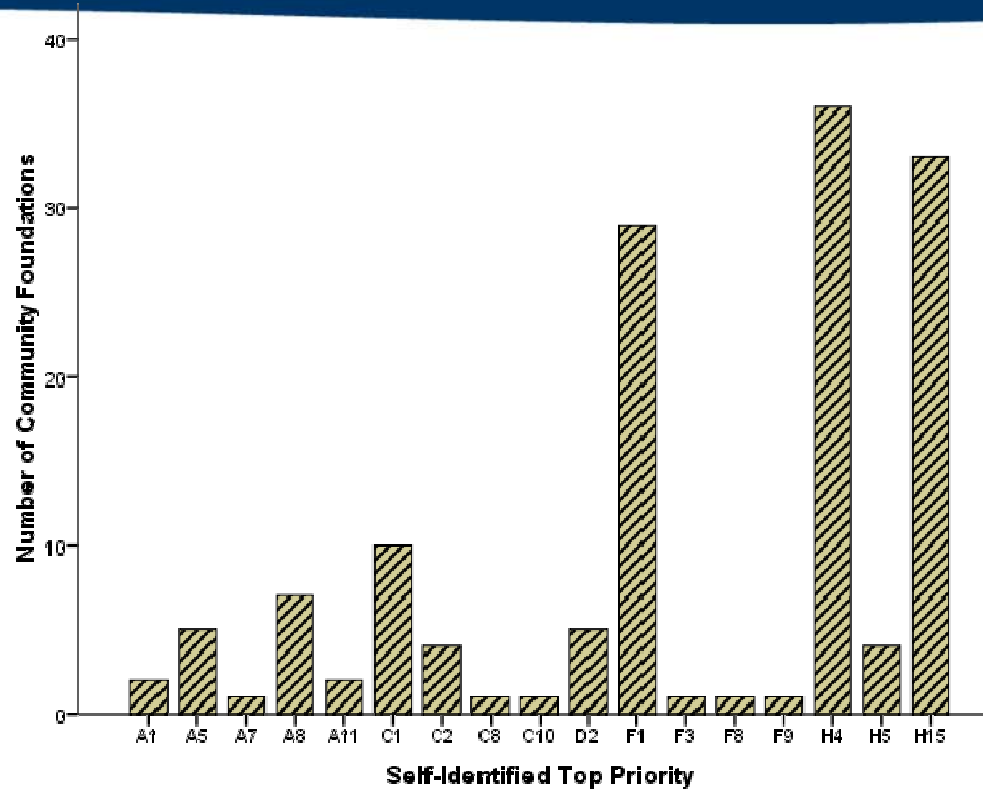
**BRANDON
UNIVERSITY**

Founded 1899



**RURAL
DEVELOPMENT
INSTITUTE**

Primary Area of Activity, 2007



Based on 37 Community Foundation tax records

A1	Housing (seniors, low-income, and those with disabilities)	D2	Festivals, performing groups, musical ensembles
A5	Other services for low-income people	F1	Hospitals
A7	Services for the physically or mentally challenged	F3	Clinics
A8	Children and youth services/housing	F8	Promotion and protection of health (first-aid, informational services)
A11	Family and crisis counseling, financial counseling	F9	Specialized health organizations, focusing on specific diseases/conditions
C1	Scholarships, bursaries, awards	H4	Community recreation facilities, trails
C8	Literacy programs	H5	Community halls
C10	Public education, other study programs	H15	Support and services for charitable sector



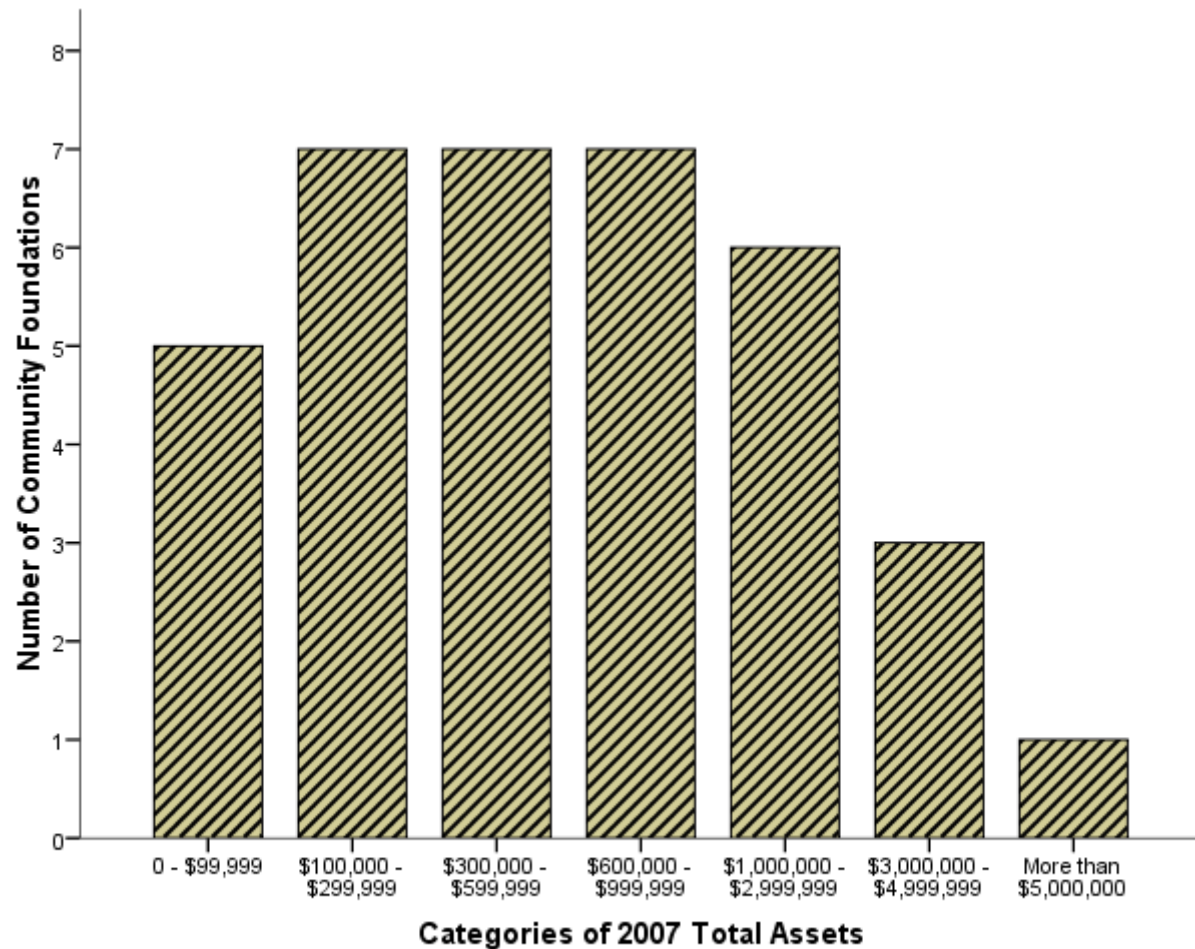
Total Assets and Median Assets, 2003-2007



Tax Year	Total Assets Reported	Median Total Asset	Smallest Community Foundation Assets Recorded	Largest Community Foundation Assets Recorded
2003	\$328,298,998	\$375,660	\$8,625	\$307,577,586
2004	\$365,840,448	\$387,069	\$831	\$346,980,307
2005	\$407,814,559	\$402,178	\$4,373	\$383,358,549
2006	\$444,397,318	\$439,279	\$17,560	\$414,690,701
2007	\$477,624,683	\$472,103	\$13,088	\$447,809,536

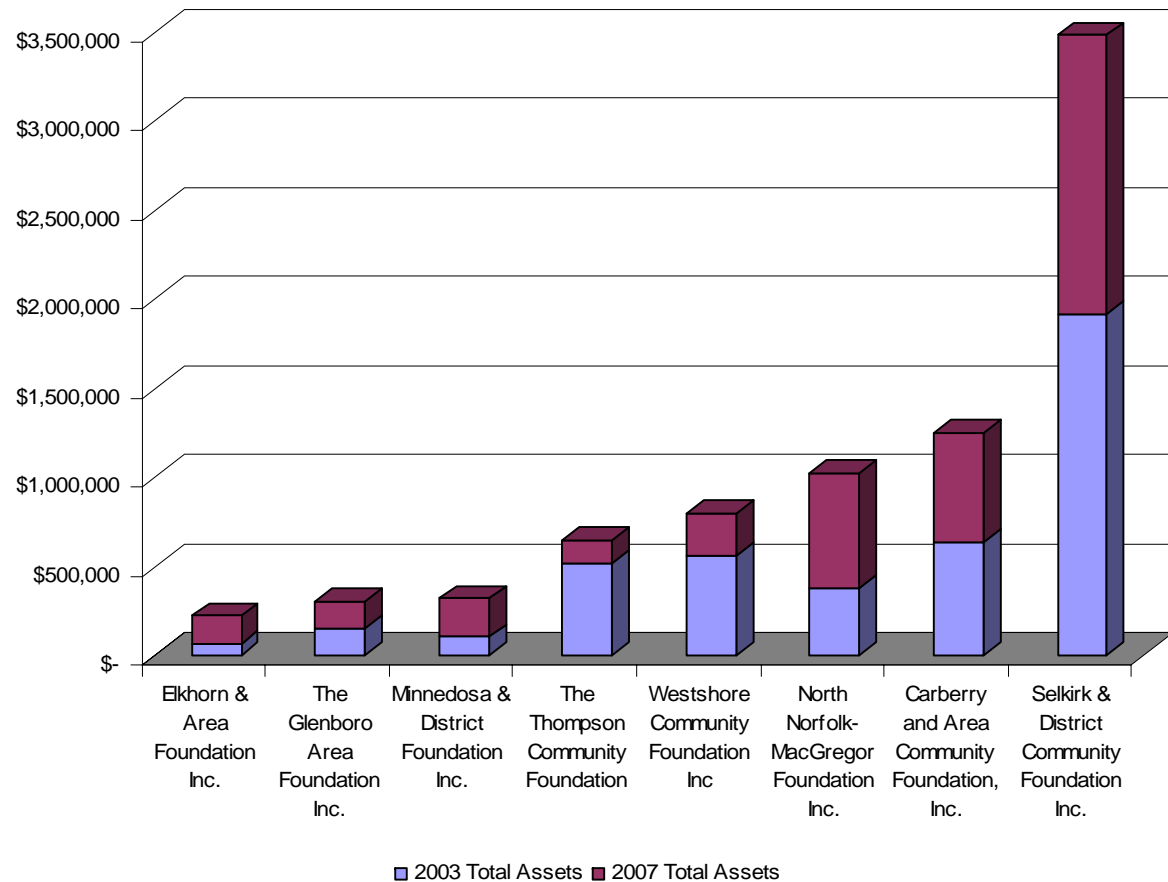


2007 Total Assets, Categorized



Based on 37 Community Foundation tax records

Illustrative Growth of Total Assets, 2003-2007



Amount of Tax Receiptable Gifts, 2003-2007



Tax Year	Total Eligible Tax Receiptable Gifts	Median Amount of Tax Receiptable Gifts	Lowest Amount of Tax Receiptable Gifts Recorded	Highest Amount of Tax Receiptable Gifts Recorded
2003	\$7,539,530	\$10,600	\$0	\$6,288,059
2004	\$7,819,902	\$14,833	\$42	\$6,203,746
2005	\$6,580,480	\$32,703	\$340	\$4,757,488
2006	\$12,156,413	\$23,974	\$0	\$9,189,680
2007	\$13,210,875	\$31,191	\$155	\$10,548,755



Total Amount of Gifts to Qualified Donees, 2003-2007



Tax Year	Total Amount of Gifts to Qualified Donees	Median Total Amount of Gifts	Smallest Amount of Gifts Distributed by a Community Foundation	Largest Amount of Gifts Distributed by a Community Foundation
2003	\$13,712,748	\$18,412	\$1,300	\$12,733,021
2004	\$14,905,068	\$23,700	\$1,345	\$13,977,551
2005	\$14,750,157	\$22,100	\$649	\$13,644,254
2006	\$14,919,125	\$17,523	\$515	\$13,827,061
2007	\$16,446,158	\$20,750	\$200	\$15,253,658



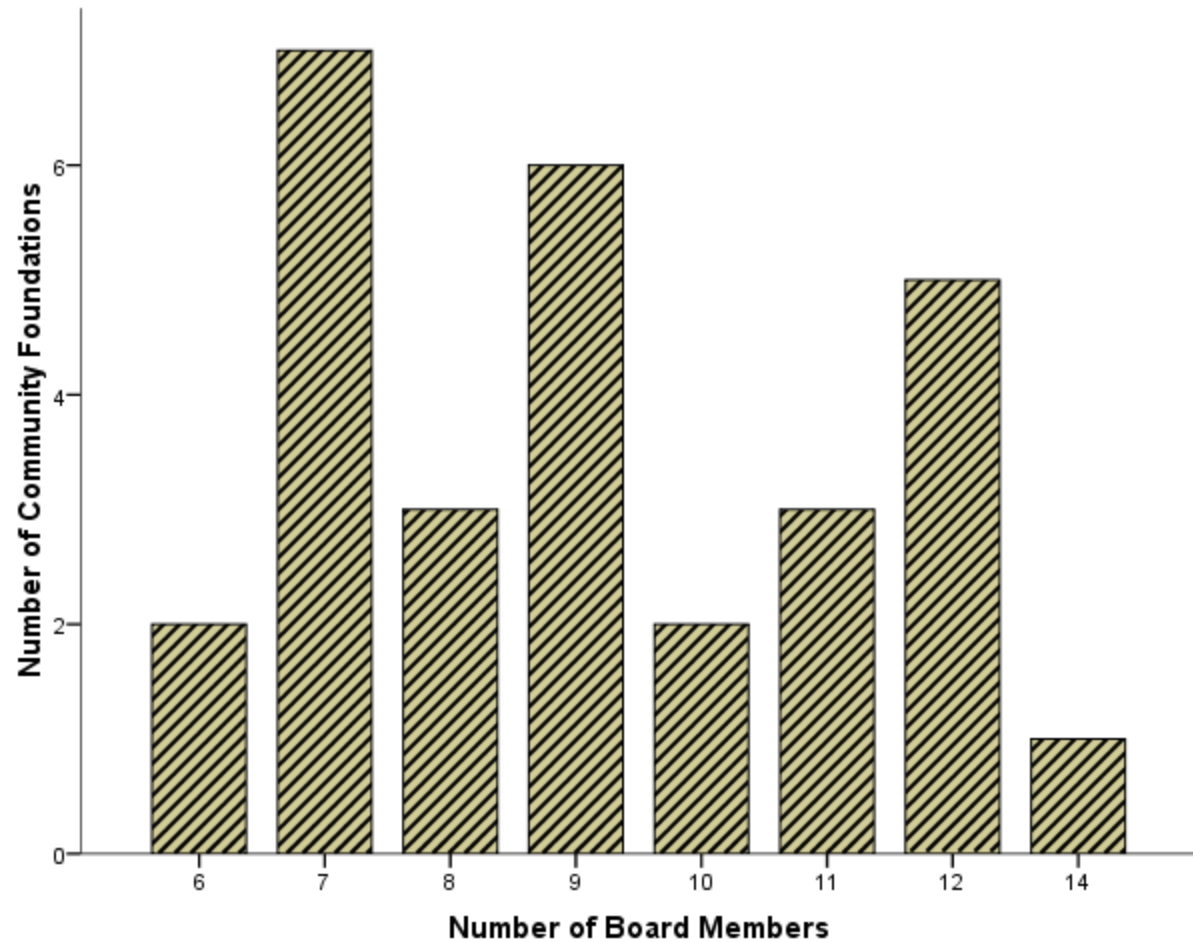
Community Foundation Survey Preliminary Results



- Preliminary information included on the following topics:
 - Board size and vacancies
 - Strategic planning
 - Perceived awareness of community foundations
 - 2009 granting intentions
 - Challenging administrative issues
- Preliminary analysis was done on only 29 surveys.
 - Findings are presented for discussion purposes.

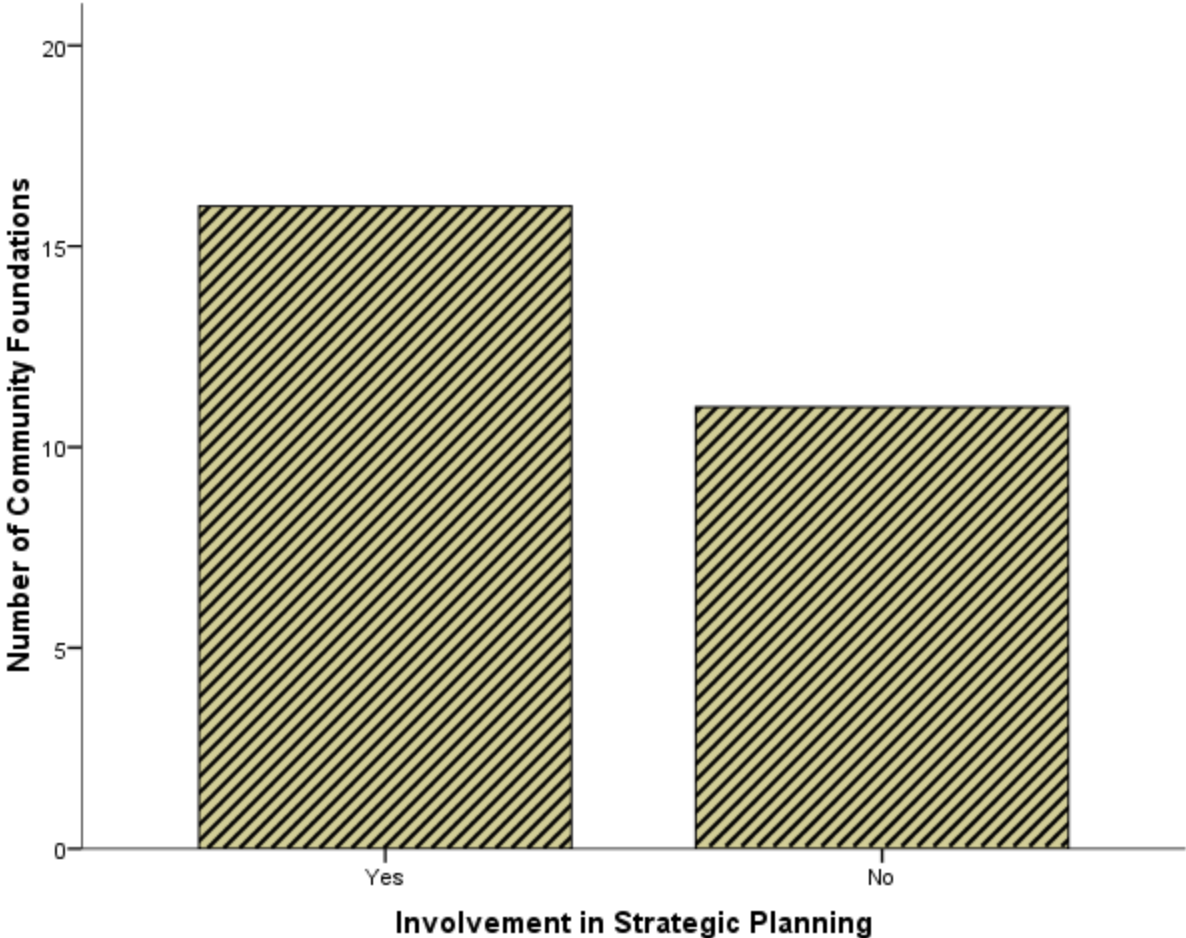


Community Foundation Board Size



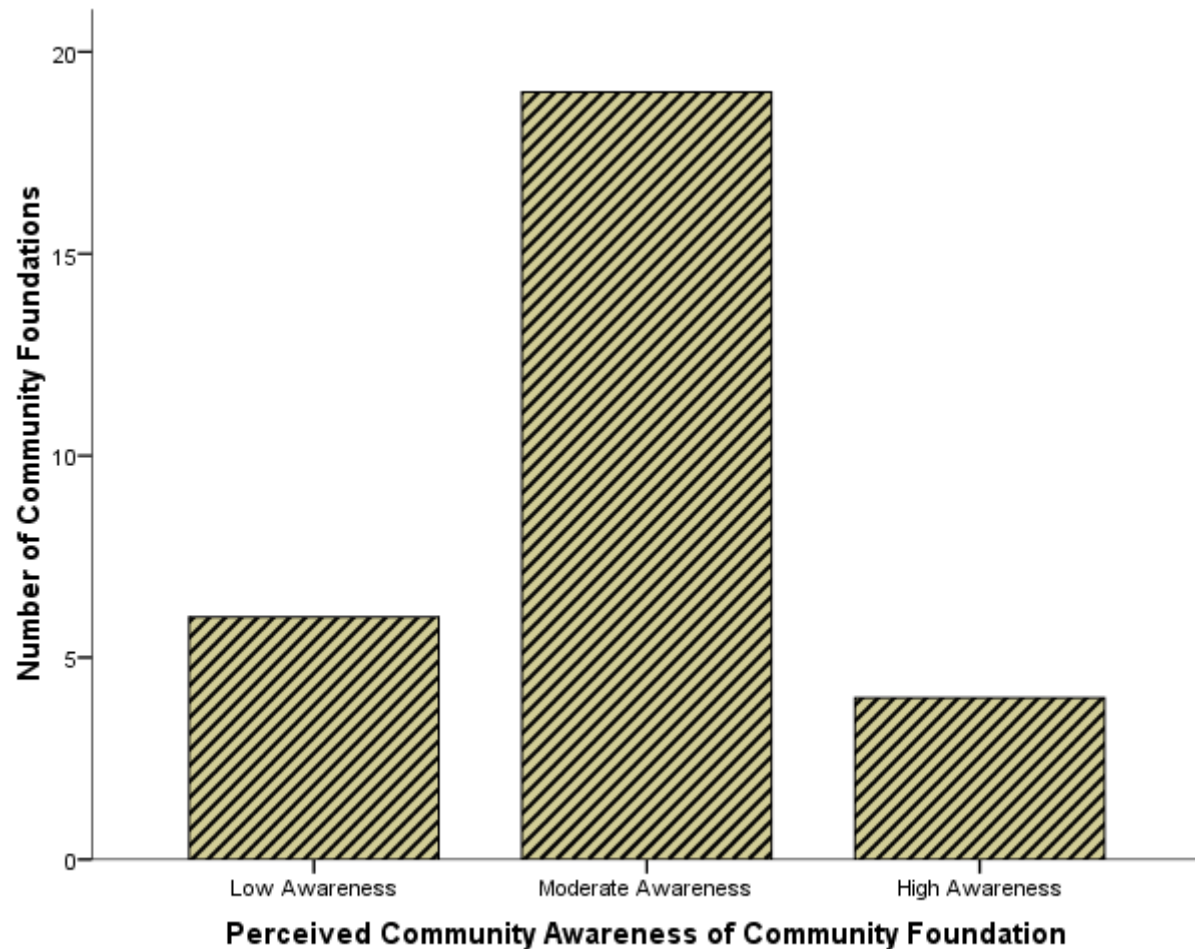
Based on 29 completed surveys

Strategic Planning



Based on 29 completed surveys.

Perceived Awareness of Community Foundations

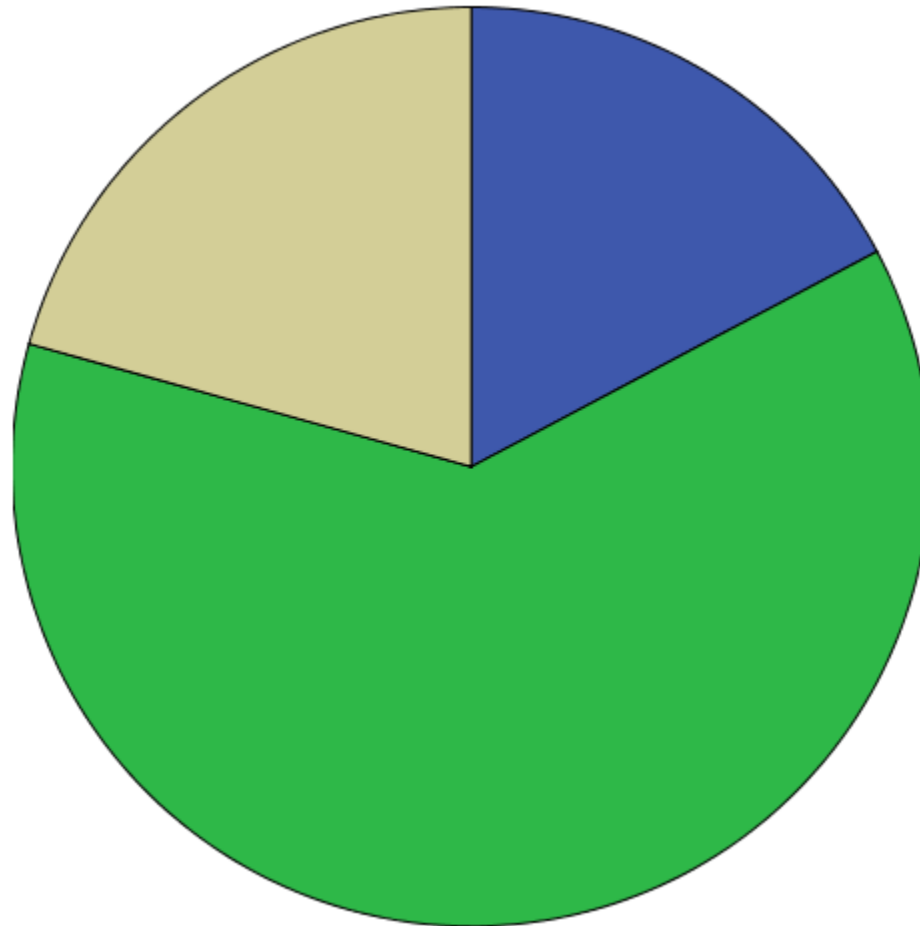


Based on 29 completed surveys.

Plans to Reduce or Suspend Granting in 2009



■ Yes
■ No
■ Unsure/Undecided



Most Challenging Administrative Issues



Tax receipting	89.7%
Grant making	79.3%
Canada Revenue Agency reporting	75.9%
Policy development	69.0%
Investments	69.0%
Donor relations	55.2%
Accounting	51.7%



Moving Forward



- **Encourage Survey Participation (April-May)**
- **Conduct Follow Up Interviews (May-June)**
- **Review Canada Revenue Agency Tax Data (April-June)**
- **Report Generation and Consultations (June – September)**



Acknowledgements



- Community Foundation board members and staff
- Financial support of The Winnipeg Foundation
- In-kind support of Manitoba Agriculture, Food, and Rural Initiatives



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