

Dear Community Foundation,

Community foundations in Manitoba are diverse, representing a large cross section of communities in urban, rural, and northern areas. Manitoba is unique with a high number of community foundations in relation to Canada. Of the 165 community foundations in Canada, 40 are in Manitoba registered with Community Foundations of Canada.

You are being asked to complete the attached survey as part of a project exploring community foundations in Manitoba. The project is being organized by the Rural Development Institute, Brandon University in partnership with The Winnipeg Foundation and Manitoba Agriculture, Food and Rural Initiatives. *The Scan of Community Foundations* project aims to understand the diversity that exists among Manitoba's 40 community foundations.

In order to understand community foundations your participation is required. The project will examine the organizations, their structures, their endowments, their community grants, and local benefits. Opportunities and challenges of community foundations, both current and anticipated, will be captured. Information generated will assist community foundations, government, and academic institutions concerned with community development.

Your participation is entirely voluntary and we encourage your participation. All comments and answers that you provide will not be attributed to your identity and comments will be generalized to prevent identification. The questions are organized into 5 categories:

- Part A – Board, Staff, and Community Engagement
- Part B – Relationships and Capacity
- Part C – Administrative Activities
- Part D – Grant Making and Donations
- Part E – Achievements and Looking Forward

We realize that your time is very valuable, but we hope that you will set aside the time required to fill in the attached questionnaire. Please note the questions are printed on both sides of the paper. Once completed, please return the survey in the postage paid envelope by **April 10<sup>th</sup>, 2009**. An electronic copy of the survey has been circulated via email. If you would like to complete the survey electronically and did not receive a copy please contact Ryan Gibson at (204) 571-8552 or [gibsonr@brandonu.ca](mailto:gibsonr@brandonu.ca).

Thank you in advance for your participation. If you have any questions, please do not hesitate to contact Ryan Gibson.

Sincerely,

Robert C. Annis

1. Name of Community Foundation

\_\_\_\_\_

2. Name of person completing the survey

\_\_\_\_\_

3. Your position/affiliation/role with the community foundation

\_\_\_\_\_

4. Contact information

Telephone Number

\_\_\_\_\_

Email

\_\_\_\_\_

5. Please list all communities, towns, villages, or rural municipalities served by your community foundation.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. What year was your community foundation incorporated?

\_\_\_\_\_

## Part A - Board, Staff, and Community Engagement

The following questions are based on current composition of the community foundation's board of directors, staff members, and community engagement. Please answer all questions of this section.

7. Please state the number of board members of your community foundation.

\_\_\_\_\_

a. Are there any vacancies currently on your board?

1.  Yes

*If yes, how many board positions are vacant?* \_\_\_\_\_

2.  No

8. Please indicate the number of males and females on your current board members.

|        |  |
|--------|--|
| Female |  |
| Male   |  |

9. Please indicate the number of current board members in each of the approximate age categories.

|  |  |
|--|--|
| Youth<br><i>under 18 years of age</i>      |  |
| Young Adult<br><i>19-35 years of age</i>   |  |
| Adults<br><i>35-64 years of age</i>        |  |
| Seniors<br><i>65 years of age or older</i> |  |

10. How are board members selected? *(check all that are applicable)*

1.  Elected
2.  Appointed
3.  Combination of elected and appointed
4.  Nominating Committee
5.  Other, please specify: \_\_\_\_\_

11. How long (in years) are terms? \_\_\_\_\_ years

12. What is the maximum number of terms that can be held by a board member?

1.  No limit
2.  1 term
3.  2 terms
4.  Other, please specify: \_\_\_\_\_

13. How often does your board meet?

1.  Once a month (12 times per year)
2.  Every other month (6 times per year)
3.  Every couple of months (2-4 times per year)
4.  Other, please specify: \_\_\_\_\_

14. Does your community foundation hold an annual general meeting?

1.  Yes
2.  No

*If yes, are members of the public invited to attend the annual general meeting?*

1.  Yes
2.  No

15. Please indicate which committees (if any) your board uses. Also indicate the number of board members and the number of community volunteers on each committee.

| Committee   | Committee Membership |                           |
|---|----------------------|---------------------------|
|   | # of Board Members   | # of Community Volunteers |
| <input type="checkbox"/> Audit/Finance                  |                      |                           |
| <input type="checkbox"/> Grant                          |                      |                           |
| <input type="checkbox"/> Development                    |                      |                           |
| <input type="checkbox"/> Other, <i>please specify</i> : |                      |                           |

16. In 2008, did your community foundation hire any professional (e.g. lawyers, accountants, etc.) or contract services?

1.  Yes                      2.  No

*If yes, please check the professional or contract services you hired*

1.  Lawyer  
 2.  Accountant  
 3.  Auditor  
 4.  Investment consultant  
 5.  Fundraising consultant  
 6.  Other, please specify: \_\_\_\_\_

17. Does your community foundation employ staff members?

1.  Yes

*If yes, please describe how many of the following types of staff employed in from January 2008 – December 2008.*

|           | Number of Staff Employed |
|-----------|--------------------------|
| Full time |                          |
| Part time |                          |
| Casual    |                          |

2.  No

18. Approximately how many other volunteers (non-board members or staff) are engaged with the community foundation?

\_\_\_\_\_

19. How do you rate your community foundation board's capacities in the following areas?

|                                  | Adequate                 | Needs Improvement        | Not Applicable           |
|----------------------------------|--------------------------|--------------------------|--------------------------|
| Auditing and financial reporting | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Board roles and responsibilities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| By-laws, constitution            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Investment and asset management  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing and promotion          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Community leadership             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Grant making                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Strategic planning               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other:                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

20. Which of the following methods does your community foundation use to inform your community(ies) about its activities (Part A)? For each communication method selected, please indicate if your community foundation pays for the service or if it is donated (Part B). *Check both if it is a combination of the two.*

| Part A   | Part B                       |                                 |
|--|------------------------------|---------------------------------|
| <i>Check all methods that apply to your community foundation</i>                                     | Paid by Community Foundation | Donated to Community Foundation |
| 1. <input type="checkbox"/> Annual Report(s)   | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 2. <input type="checkbox"/> Community meeting(s)   | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 3. <input type="checkbox"/> Paid newspaper advertisements  | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 4. <input type="checkbox"/> Newsletters (print or electronic)  | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 5. <input type="checkbox"/> Website(s), <i>please list website</i>                                   | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 6. <input type="checkbox"/> Radio  | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 7. <input type="checkbox"/> Brochure(s)  | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 8. <input type="checkbox"/> Community Roots magazine   | <input type="checkbox"/>     | <input type="checkbox"/>        |
| 9. <input type="checkbox"/> Other (ie: Will Week, Community Foundation week), <i>please specify:</i> | <input type="checkbox"/>     | <input type="checkbox"/>        |

21. Is your board involved in strategic planning activities? *Please check appropriate box.*

- 1.  Yes
- 2.  No

If yes ...

22. Are your community foundation's planning activities:

- 1.  Short term (1 year)?
- 2.  Long term (3-5 years)?
- 3.  Both short and long term?

23. How closely are these plans followed?

- 1.  Not very close
- 2.  Somewhat
- 3.  Very close

24. What is the purpose of your strategic plans?

- 1.  Investment and asset management
- 2.  Grant making
- 3.  Board succession planning
- 4.  Strategic fund development
- 5.  Staffing
- 6.  Other, please specify: \_\_\_\_\_

If no, please describe why your board is not involved in strategic planning activities.

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## Part B - Relationships and Capacity

This section consists of questions relating to your community foundation's relationships with other organizations, the perception of your community foundation, and the capacity of the community foundation.

25. How would you rate the community's overall awareness of your community foundation?

- |   |  |   |   |
|---|--|---|---|
| 1. <input type="checkbox"/> No<br>Awareness | 1. <input type="checkbox"/> Low<br>Awareness | 2. <input type="checkbox"/> Moderate<br>Awareness | 3. <input type="checkbox"/> High<br>Awareness |
|---|--|---|---|

26. Does being a member of Community Foundations of Canada assist your community foundation?

- |                                 |                                |                                    |
|---------------------------------|--------------------------------|------------------------------------|
| 1. <input type="checkbox"/> Yes | 2. <input type="checkbox"/> No | 3. <input type="checkbox"/> Unsure |
|---------------------------------|--------------------------------|------------------------------------|

27. Does your community foundation use any Community Foundation of Canada services?

1.  Yes

2.  No

3.  Unsure

28. Does your community foundation have a Youth in Philanthropy group (Youth Advisory Council)?

1.  Yes

b. What year did the Youth in Philanthropy start?

\_\_\_\_\_

c. How many members are on the Youth in Philanthropy group?

\_\_\_\_\_

d. Is the Youth in Philanthropy group active in grant making?

1.  Yes

2.  No

e. In 2008, how many grants were made by the Youth in Philanthropy group and what was the total amount granted?

Number of Grants

\_\_\_\_\_

Total Value of Grants

\$ \_\_\_\_\_

2.  No

## Part D - Administrative Activities

This section consists of questions relating to accounting practices, management of investments, administrative challenges, and financial support received from external organizations.

29. Who performs administrative activities on behalf of your community foundation?

1.  Board members

*If yes, how many board members involved:* \_\_\_\_\_

2.  Community foundation staff (full-time or part-time)

3.  Other, please specify: \_\_\_\_\_

30. What method does your community foundation use for record keeping?

*Check all that apply.*

1.  Completely manual

2.  Completely computerized

Please specify software used: \_\_\_\_\_

3.  Combination of manual and computerized

4.  Consultant

5.  Other, please specify: \_\_\_\_\_

31. What are the most challenging issues facing the administration of your community foundation?

1.  Accounting
2.  Tax receipting
3.  Donor relations
4.  Grant making
5.  Policy development
6.  Investments
7.  Canada Revenue Agency reporting (T 3010 forms)
8.  Office space
9.  Other, please specify: \_\_\_\_\_

32. Who makes recommendations on how the community foundation's investments are managed? *Check all that apply*

1.  Board members
2.  Community foundation staff
3.  Financial consultant
4.  Investment committee
5.  Other, please specify: \_\_\_\_\_

33. Where are the community foundation's assets invested?

| Investment Type                | % of Total Assets | Manger/<br>Company | Mutual Funds             |                          |
|--------------------------------|-------------------|--------------------|--------------------------|--------------------------|
|                                |                   |                    | Yes                      | No                       |
| Short term/ GICs               |                   |                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Bonds                          |                   |                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Canadian Equity                |                   |                    | <input type="checkbox"/> | <input type="checkbox"/> |
| US Equity                      |                   |                    | <input type="checkbox"/> | <input type="checkbox"/> |
| International Equity           |                   |                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Other, <i>please specify</i> : |                   |                    | <input type="checkbox"/> | <input type="checkbox"/> |

34. What costs are associated with operating your community foundation?

1.  Advertising and promotion
2.  Travel and vehicle
3.  Interest and bank charges
4.  Licenses, memberships, and dues
5.  Office supplies and expenses
6.  Occupancy costs (rental, utilities, building maintenance, taxes, etc.)
7.  Professional and consulting fees
8.  Education and training for staff/volunteers
9.  Salaries, wages, benefits and honoraria
10.  Amortization of capitalized assets
11.  Research grants and scholarships as part of charitable program



35. Does your community foundation receive any financial or in-kind support from external organizations for operating costs?

1.  Yes

If yes, please specify which organization(s) and the type of support:

|                             | Type of Support          |                          |
|-----------------------------|--------------------------|--------------------------|
|                             | Financial                | In-Kind                  |
| 11. Local municipality      | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Government of Manitoba  | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Government of Canada    | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Private Foundations     | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. The Winnipeg Foundation | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Corporations            | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Crown corporations      | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Other: please specify:  | <input type="checkbox"/> | <input type="checkbox"/> |

2.  No

## Part E - Grant Making

This section consists of questions relating to grants provided by your community foundation, priorities for local grants, areas of grant making/support, and endowment funds.

36. Over the past three years, how many grants did your community foundation make each year? What was the total value of all grants dispersed in each year? If information is available for the last five years, please provide it.

|      | Approximate Number of Grants | Approximate Total Value of All Grants |
|------|------------------------------|---------------------------------------|
| 2008 |                              | \$                                    |
| 2007 |                              | \$                                    |
| 2006 |                              | \$                                    |
| 2005 |                              | \$                                    |
| 2004 |                              | \$                                    |

37. In 2008, did your community foundation initiate any joint projects?

1.  Yes

If yes, please list the project(s): \_\_\_\_\_

\_\_\_\_\_

2.  No

3.  Unsure

38. Does your community foundation have granting priorities in a particular area?

1.  Yes

If yes, what are your granting priorities?

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2.  No

39. Are you planning to reduce the amount of grants or suspend granting in 2009?

1.  Yes

2.  No

3.  Unsure/undecided

40. Please indicate which of the following areas your community foundation currently supports (as per CRA T3010) and provide a priority rating for each of the areas, regardless whether or not your community foundation is currently supporting the area.

|  | Currently Supporting<br>(Check if supported) | Priority Ranking         |                          |                          |                          |                          |
|--|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
|  |  | Very Low                 | Low                      | Medium                   | High                     | Very High                |
| <b>Social Services</b><br><i>Housing, food/clothing banks, senior's services, immigration aid, shelter</i>   | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>International Aid and Development</b><br><i>Infrastructure development, agricultural programs, medical services, disaster relief</i>  | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Education and Training</b><br><i>Scholarships, bursaries, support of schools/colleges/universities, literacy programs</i>   | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Culture and Arts</b><br><i>Museums, galleries, cultural centres, historical/heritage sites, artists</i>   | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Religion</b><br><i>Places of worship, missionary organizations, social outreach, religious colleges/seminaries</i>  | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Health</b><br><i>Hospitals, nursing homes, clinics, mental-health services, addiction services</i>  | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Environment</b><br><i>Nature/habitat conservation, preservation of species, recycling, Lake Winnipeg Watershed</i>  | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Other Community Benefits</b><br><i>Agricultural societies, parks, recreation facilities, libraries, community halls, summer camps, human rights, ambulance/fire/rescue services, street scaping</i> | <input type="checkbox"/>                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

41. Has your community foundation received matching or challenge grants?

1.  Yes                      2.  No

B. If yes, please indicate the source of the matching or challenge grant(s).

*Please check all that apply.*

10.  Government of Manitoba  
11.  Government of Canada  
12.  Corporations  
13.  Private foundations  
14.  Other community foundations  
15.  Other, please specify: \_\_\_\_\_

42. From 2004-2008, please indicate the approximate number of gifts received and the approximate total value.

| Year | Approximate Number of Gifts Received | Approximate Value of All Gifts Received |
|------|--------------------------------------|---|
| 2008 |                                      | \$                                      |
| 2007 |                                      | \$                                      |
| 2006 |                                      | \$                                      |
| 2005 |                                      | \$                                      |
| 2004 |                                      | \$                                      |

43. What are the most frequent sources of gifts?

1.  Individuals  
2.  Local businesses  
3.  Government  
4.  Private foundations  
5.  Other community foundations  
6.  Planned gifts and insurance policies  
7.  Other, please specify: \_\_\_\_\_

44. Please indicate the purpose of your fundraising. *Check all that apply.*

1.  Operations  
2.  Flow through grant making  
3.  Endowments  
4.  Other, please specify: \_\_\_\_\_

45. Based on categories from the Canada Revenue Agency's T 3010 form, please indicate how your community foundation increases its endowment, both currently and in the past? *Please check all that apply.*

|   | Current Methods          | Previously Used Methods  |
|---|--------------------------|--------------------------|
| 1. Advertisements, posters, flyers, radio or TV commercials | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Auctions   | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Bingo and casino nights                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Collection plates and boxes                              | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Door-to-door solicitation                                | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Draws or lotteries                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Fundraising dinners, galas, or concerts                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Fundraising sales (ie: cookies, chocolates)              | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Mail campaigns   | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Planned giving programs                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Targeted corporate donations/sponsorships               | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Targeted contacts                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Telephone solicitation                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Tournaments or sporting events                          | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. Walk-a-thons or bike-a-thons                            | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Other, please specify:                                  | <input type="checkbox"/> | <input type="checkbox"/> |

46. Does your community foundation have any targeted or designated endowment funds with special criteria? *(for example, separate endowments for local scholarships)*

1.  General community building
2.  Scholarships
3.  Donor advised
4.  Designated
5.  Other, please specify: \_\_\_\_\_

47. What are your community foundation's challenges in endowment building?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Part F – Achievements and Looking Forward

This section consists of questions relating to achievements of your community foundation, priorities for the next 3-5 years, and identification of resources to assist your community foundation.

48. Are you optimistic that your community foundation will benefit from the local transfer of wealth in your community/region?

1.  Yes
2.  No
3.  Unsure

49. Please describe in brief some of your community foundation's major accomplishments.

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50. Are there specific *tools*, *resources*, or *actions* that would make your community foundation more effective?

1.  Yes

If yes, please specify: \_\_\_\_\_

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2.  No

51. What is the most important thing you feel your community foundation should attempt to achieve over the next 3-5 years?

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52. What are your hopes for the future of your community/region and how important is the role of your community foundation in achieving this future?

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**END OF SURVEY**

Thank you for participating in the survey. Please return the completed survey in the postage paid envelope. Preliminary information from the surveys will be presented at the upcoming Community Foundations of Canada Regional Meeting. The Regional Meeting will take place April 24-25, 2009 in Brandon, in conjunction with Capturing Opportunities.

If you have any questions, please do not hesitate to contact me at (204) 571-8552 or [gibsonr@brandonu.ca](mailto:gibsonr@brandonu.ca). For further information on the project please visit: [www.brandonu.ca/rdi/comfdn.asp](http://www.brandonu.ca/rdi/comfdn.asp).