



RURAL
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INSTITUTE

DIVERSE, DYNAMIC, AND DEDICATED

SCAN OF MANITOBA'S RURAL AND NORTHERN
COMMUNITY FOUNDATIONS

September 2009



**BRANDON
UNIVERSITY**

Founded 1899

Rural Development Institute, Brandon University

Brandon University established the Rural Development Institute in 1989 as an academic research centre and a leading source of information on issues affecting rural communities in Western Canada and elsewhere.



RDI functions as a not-for-profit research and development organization designed to promote, facilitate, coordinate, initiate and conduct multi-disciplinary academic and applied research on rural issues. The Institute provides an interface between academic research efforts and the community by acting as a conduit of rural research information and by facilitating community involvement in rural development. RDI projects are characterized by cooperative and collaborative efforts of multi-stakeholders.

The Institute has diverse research affiliations, and multiple community and government linkages related to its rural development mandate. RDI disseminates information to a variety of constituents and stakeholders and makes research information and results widely available to the public either in printed form or by means of public lectures, seminars, workshops and conferences.

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COMMUNITY FOUNDATIONS

Submitted to:

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EXECUTIVE SUMMARY

Philanthropy, especially through community foundations, is a powerful catalyst for strengthening communities in Canada. Community foundations and their board members are interested and engaged in finding ways to make their community a more vital place to live, work, and play. Community foundations strive to build stronger communities through philanthropic leadership. Throughout Manitoba, community foundations are diverse, representing a large cross section of communities in urban, rural, and northern areas. Manitoba is unique in Canada with a disproportionately high number of community foundations in relation to the rest of the country. Of the 164 community foundations in Canada, 41 are in Manitoba. In short, Manitoba's rural and northern community foundations are diverse, dynamic, and dedicated to their communities.

The *Scan of Community Foundations* project strived to increase the understanding of the diversity existing among Manitoba's rural and northern community foundations. Through the project activities an increased understanding of community foundations, their organizations, their structures, their endowments, their community grants, and local benefits were achieved. The opportunities and challenges encountered by community foundations were captured to assist the community foundation movement, government policy and programming, and academic institutions concerned with community development.

A mixed-method approach generated a comprehensive understanding of rural and northern community foundations across Manitoba. The methodology included three approaches: (i) survey of community foundations, (ii) interview with community foundation board members and/or staff, and (iii) review of Canada Revenue Agency tax records. A 13-page survey containing 52 questions was created to gain a perspective on five main categories: (i) Board, Staff, and Community Engagement, (ii) Relationships and Capacity, (iii) Administrative Activities, (iv) Grant Making and Donations, and (v) Achievements and Looking Forward. Follow-up interviews supplemented local information collected from the community foundation survey. Each conversation provided an opportunity to clarify survey responses, explore local opportunities and challenges, identify partnerships, and understand the local community environment. Tax records from the Canada Revenue Agency from 2003-2008 were compiled for each rural and northern community foundation in Manitoba, when available. Due to the small number of 2008 tax records available, the focus of analysis for the Canada Revenue Agency tax records was 2003-2007.

In presenting information generated from the project two things should be considered when reviewing the findings: participation rates and access to taxation records. The Rural Development Institute, with the assistance of The Winnipeg Foundation, strived to achieve a comprehensive understanding of rural and northern community foundations. Of the 41 community foundations, information was collected from 34 community foundations, representing 83%. The representation of community foundations in the Canada Revenue Agency tax records was not complete. As a result, the tax records only portray the financial standing of 37 of the 41 rural and northern community foundations. The report contains information submitted to the Rural Development Institute from community foundation representatives; there was no attempt to validate submitted information.

Profile of Participating Community Foundations

- 34 community foundations returned a completed survey.
- 13 community foundations participated in a follow up interview
- 37 community foundation tax records were available from the Canada Revenue Agency in 2007.
- Based on Canada Revenue Agency data 65% of community foundations in Manitoba were registered between 1990 and 1999, corresponding to the timing of the Thomas Sill Foundation matching challenge grants.
- Based on the information received from the 34 community foundations, 183 communities/municipalities are being served.
- The catalysts for establishment of community foundations were: Building on the Momentum of The Winnipeg Foundation, Infrastructure to House Donations, Matching Challenge Grants from the Thomas Sill Foundation, and Encouragement of Local Government Desire for a Local Legacy.

Assets, Endowments, and Grants

- The 2007 total assets among the 37 community foundations in Manitoba were \$30,354,278. Total assets are defined as the sum of bank accounts, cash, investments (short-term and long-term), amounts receivable, investments in arm's length parties, inventories, and capital assets (at cost or fair market value).
- Assets of Manitoba's rural and northern community foundations are invested in a variety of different investment types
- Since 2003, the total assets in Manitoba have increased by almost \$10 million.
- In 2007, community foundations in Manitoba received in excess of \$2.5 million in total eligible amount of tax receiptable gifts. Total eligible amount of tax-receipted gifts is the sum of all gifts received by a community foundation during the fiscal period for which tax receipts were issued.
- In 2007, approximately \$1.2 million was distributed in the forms of grants to charitable organizations.
- The average amount granted to charitable organizations by each community foundation in 2007 was \$38,467.74, an increase of about 14% over the five-year period.
- Community foundations expressed challenges in building endowments due to awareness, local competition, and internal operations.
- Three distinct reasons for fundraising: operation costs (50% of community foundations), increase local endowments (50% of community foundations), and flow through grant making (26% of community foundations).

Foundation Governance

- The number of board members ranged from the minimum of 4 to the maximum of 14; average number of board members is 7.
- The majority of the community foundations, represented by about 29%, indicated board members are selected through appointment.
- Gender breakdown of board members for the 34 participating community foundations is 55% male and 45% female.
- Two terms was the limit for board members for 47% of community foundations.
- Annual general meetings are held by 76% of rural and northern community foundations. Three quarters of the annual general meetings are open to the public.
- 17 of 34 community foundations are involved in short and/or long term strategic plans.

Human Resources and Administrative Activities

- 54.5% of rural and community foundations participating in the survey employed at least one staff member; however, staff positions tend not to be full-time positions.
- 50% of community foundations utilize a combination of manual and computerized record keeping.
- The most common software programs utilized for completely computerized record keeping were: Giftworks, MYOB, Powerchurch, QuickBooks, and Simply Accounting.
- The three board capacities ranked with the highest percent of 'adequate' among community foundations were grant making (94%), auditing and financial reporting (82%), and competence in by-laws and constitutions (82%).
- The three capacities ranked with the lowest percent of adequate were community leadership (56%), marketing and promotion (35%), and strategic planning (21%).
- The most challenging issues facing the administration of community foundation are challenges and opportunities related to human resources, financial resources, awareness of foundations, operational structures and support, skills and capacities.

Relationships and Capacities

- All the 13 community foundations interviewed responded they have access to high-speed Internet.
- 12 of the 13 community foundations confirmed to be having either formal or informal relationships with other community foundations.
- All the community foundations interviewed confirmed recognizing the benefits of sharing resources or collaborating with other community foundations.

- 11 of 13 community foundations acknowledged having formal or informal relationships with other groups, municipalities, or associations.
- 27 of 34 community foundations said it is of help to them to be members of the Community Foundations of Canada.
- 44% of community foundations indicated having a Youth in Philanthropy group.
- Youth in Philanthropy groups are involved in grant making, whereby in 2008 they made between 2 and 20 grants each, with the average number of grants made being 6 per group. Grants averaged \$3,153, with the least and highest values being \$2,000 and \$7,500 respectively.

Grant Making

- 56% of rural and northern community foundations said they do not plan to reduce the amount of grants or suspend granting in 2009.
- 68% of community foundations received a challenge or matching grant in 2008.

Achievements and Looking Forward

- The most common goals expected over the next ten years included: endowment building/growth; leadership in community projects; awareness; and continuing to grant.
- 73% of the community foundations are optimistic about the transfer of wealth.
- Major accomplishments cited by community foundations included: increased profile and awareness; undertaking projects and initiatives towards education; endowment building/growth; funding health projects; support of senior projects; supporting sports and recreational activities; conducting projects on arts and heritage; environmental conservation; establishing and supporting Youth in Philanthropy programs; and successful internal operations.
- Community foundations suggested tools, resources, or actions, such as advanced technology, awareness, community collaboration, and internal improvements, to increase the effectiveness of foundations.

All of community foundations utilize a website to communicate their message. Manitoba's rural and northern community foundations are dedicated and diverse. Community foundations, through their volunteers, illustrated a deep dedication to their communities through the contribution of time, grant making, and responding to the needs of their area. Although collectively building stronger communities, each community foundation is diverse in their priorities, opportunities, challenges, and abilities to respond to local needs. Illustrations of local priorities range from supporting scholarships, to day cares, and to building green spaces.

The rural and northern community foundations of Manitoba recognize no limit when it comes to affecting a positive change in their communities. Over the past period of five years (2004 – 2008), these community foundations have provided in excess of \$5.5 million in the forms of grants in support of community-based initiatives. Examples of such initiatives include, but not limited to, a \$400,000 grant in

support of development of a school curriculum by one community foundation; and a \$500,000 grant towards the improvement of education and medical services, among others, by another community foundation.

The rural and northern community foundations encounter numerous challenges in their day-to-day activities and operations. Some of these challenges are:

- Administrative-related e.g. accounting skills, maintaining relations with donors, policy development, Canada Revenue Agency reporting, and administrative costs related to staffing;
- Low public awareness of community foundations, their activities and even locations accompanied with limited tools and resources to address the challenge;
- Local competition with regards to fundraising due to presence of other organizations in the communities which also solicit funds from the same sources;
- Lack of time, on the side of board members and community volunteers, to adequately serve their community foundations.

Overall, despite being broken down and apart by these and other challenges, community foundations have come together with the support of The Winnipeg Foundation, crown corporations, private foundations, their local municipalities, the government of Manitoba, corporations and others to address these challenges. As a result, these community foundations are very optimistic in terms of fulfilling their roles and responsibilities in their respective areas.

They indeed are committed to a better future and nothing can seemingly stop them. They have managed to increase their total assets from \$20,721,412 in 2003 to \$30,354,278 in 2007, which is an almost 10% increase.

The community foundations have formed Youth in Philanthropy groups that are also active in fundraising. These groups have also supported a number of community projects covering areas of medical and health care, sports and recreation, education improvement, environmental protection and conservation. These are just some of the areas these community foundations extend their grants to.

As they march into the future, community foundations intend to:

- Engage more youth in the movement;
- Continue to increase their endowments and keep growing;
- Continue to make a difference in their communities by increasing their grants;
- Pursue effective promotion strategies to sensitize their communities of their activities and encourage community support and engagement;
- Look into new areas where their support is needed, such as in the field of social justice.

Community foundations need to read and review the findings generated through the project. Due to the diversity among rural and northern community foundations, the interpretation of questions may vary. Variance in interpretation is healthy and constructive for moving the community foundations movement forward in Manitoba. Each community foundation is encouraged to suggest implications from the findings in the areas of community development/practice, policy, and academia/research.

Based on the findings generated from the project, a series of initial questions for further consideration are posed. Questions are posed from the perspective of each area: community development/practice, policy, and academia. The following list is by no means exhaustive; rather, the list should be viewed as organic and continually changing.

Community Development/Practice

- How can the profile of community foundations in rural and northern communities be raised?
- As formal and informal collaborations are occurring among community foundations in Manitoba, how can collaborating be encouraged across Manitoba?
- What resources, or mechanisms, need to be created to assist the community foundation boards with effective management of staff and volunteers? If resources are already available, how can they be accessed and used more frequently?

Policy

- How can community foundations ensure awareness among provincial and federal government departments operating in rural and northern communities?
- How do government departments/agencies support community foundations, particularly addressing challenges and opportunities?
- Given community foundations are making in excess of \$1.2 million annual contributions to rural and northern communities, what are the opportunities for government policy and/or programs to assist community foundations in continuing to contribute to the vitality and sustainability of their communities/regions?

Research

- What is the transfer of wealth amount in rural and northern communities in Manitoba? How do we create a Canadian formula for estimating wealth transfer potentials? When is the key timeframe for focusing on wealth transfer?
- How can university research centres, and faculty, assist community foundations and government to strengthen the community foundation movement?
- How sustainable is the community foundation movement in rural and northern Manitoba communities?

ACKNOWLEDGEMENTS

The Rural Development Institute, Brandon University would like to acknowledge the dedication and financial support from organizations contributing to this project. We would like to recognize community foundation board and staff members for taking the time to participate in the survey and follow up conversations. Without this input, the study would not have been possible. Thank you to the board and staff members of The Winnipeg Foundation for providing financial and in-kind supports to the project. The contribution demonstrates a commitment and aspiration for a strong community foundation movement in Manitoba. The project also benefited from contributions from Community Foundations of Canada and Manitoba Agriculture, Food and Rural Initiatives.

INTRODUCTION

Philanthropy, especially through community foundations, is a powerful catalyst for strengthening communities in Canada. Community foundations and their board members are interested and engaged in finding ways to make their community a more vital place to live, work, and play. Community foundations strive to build stronger communities through philanthropic leadership. Throughout Manitoba community foundations are diverse, representing a large cross section of communities in urban, rural, and northern areas. Manitoba is unique in Canada with a disproportionately high number of community foundations in relation to the rest of the country. Of the 164 community foundations in Canada, 41 community foundations are in Manitoba. In short, Manitoba's rural and northern community foundations are diverse, dynamic, and dedicated to their communities.

The *Scan of Community Foundations* project strived to increase the understanding of the diversity existing among Manitoba's rural and northern community foundations. Through the project activities, an increased understanding of community foundations, their organizations, their structures, their endowments, their community grants, and local benefits was achieved. The opportunities and challenges encountered by community foundations were captured to assist the community foundation movement, government policy and programming, and academic institutions concerned with community development.

The Rural Development Institute, Brandon University, conducted the investigation of the community foundations from February through August 2009. With the support of The Winnipeg Foundation and assistance from Community Foundations of Canada and Manitoba Agriculture, Food and Rural Initiatives the project connected to a large portion of rural and northern community foundations in Manitoba. The anticipated diversity and complexity of community foundations meant a single approach to collecting information would be inadequate to capture the nuances of organizational structure, assets, and achievements. As a result, the project utilized three sources of information to increase the understanding of community foundations: a mail out/email survey, telephone interviews, and Canada Revenue Agency tax records.

This document is a comprehensive reporting of information collected through each of the three methods and background literature. The report is composed of six components:

Charitable Giving in Manitoba - Background information on charitable giving in Manitoba and Canada is provided to understand the context of community foundations in Manitoba. This information is particularly useful in understanding the potential for endowment growth and wealth transfer. Further information on wealth transfer is provided in the appendices.

Methodology – This component outlines the methods of data collection utilized in collecting information from each of the three sources. The section also offers a brief summary of data limitations and considerations as not every rural and northern community foundation participated in the survey, interviews, and tax records.

Profile of Responding Community Foundations – The Rural Development Institute, with the assistance of The Winnipeg Foundation, strived to receive feedback from all rural and northern community foundations for the study. Unfortunately, seven community foundations are not represented in the data. The extent to which the information collected from the 34 community foundations is representational of the 7 community foundations not participating is unknown; however, a profile of responding community foundations is provided to characterize who participated in the study.

Scan of Rural and Northern Community Foundations – Based on the data available six themes emerged: (i) assets, endowments, and grants, (ii) foundation governance, (iii) human resources and administrative activities, (iv) relationships and capacities, (v) grant making, (vi) achievements and looking forward. Highlights from the surveys, interviews, and tax records are provided in each theme.

Summary – Findings generated from the project are examined from the perspective of community development, policy, and academia. The summary poses questions for further consideration.

Appendices – In addition to findings generated from the study, a series of five appendices are provided to offer additional related information. Topics of appendices are: overview of the Rural Development Institute, copy of the survey instrument, copy of the interview guide, list of communities/municipalities served by community foundations, and wealth transfer.

CHARITABLE GIVING IN MANITOBA

With an average donation of \$1,470 in 2008, Canadians are among the most giving people at a global scale. Impressively, despite the drop off in the degree of charitable giving in nearly every province in the country in the period ranging from 1996 to 2006, it was still found that until December 2008 the overall percentage of aggregate personal income donated to charities had generally increased in the country.

Comparisons across the provinces between 1996 and 2006 identified Manitoba as the most giving province in Canada. A study conducted by the Fraser Institute in December 2008 rated the percentage of Manitoba's tax filers (28.1%) as the highest of all donating to registered charities at the national level. Furthermore, Manitoba ranked first in terms of the total amount donated at 1.14% with respect to the total income earned in the province. It is not only individuals who make these astonishing donations to charity organizations in Manitoba but also the financial and non-financial institutions and small business. Manitobans give a wide range of donations other than financial; these include, among others, clothing or goods, and food.

Impressively, the generosity of Manitobans transcends beyond their financial or material donations to include the giving of time to various causes for the benefit of their communities. An example taken from a study confirms that Manitoba volunteers contributed an average of 159 hours each to charitable causes in 2007, totaling 81.5 million hours (Statistics Canada, 2009).

Similar to many other provinces in Canada, donors in Manitoba cite their main motivations for donating as being, in order of importance, general compassion towards those in need; satisfaction with the cause of the charity organizations; religious calls; and the tax credit received from government in response to making donations. Overall, according to research, rural residents do more volunteering than their urban counterparts do even when such factors as age, gender, household income, level of education, place of birth, province of residence and marital status come into play. More donations in Manitoba are made through places of worship compared to other means such as door-to-door canvassing. However, Manitobans who are able to donate, but did not do so, refer to either difficulty to find a worthy cause or not knowing where to donate as being the chief barriers.

According to Statistics Canada, in 2006, 233,270 Manitobans donated a total of \$407,691 to registered charities. The average age of Manitoba donors was 52, the same age as the national average. The average age of donors is an important consideration for rural and northern community foundations when considering the transfer of wealth opportunities. Transfer of wealth studies in the United States demonstrate the wealth in rural communities is peaking, or will peak, in the next 10-20 years depending on jurisdictions. Unfortunately, transfer of wealth studies are not available in Canada. Tables 1 and 2 illustrate the age categories of donors in Manitoba and the average annual donation to registered charities by age categories for Manitoba and Canada.

Table 1. Charitable Giving in Canada and Manitoba by Age of Donors, 2006

Age Groups	Percentage of Total Donors in Canada	Percentage of Total Donors in Manitoba
0 to 24	3%	4%
25 to 34	12%	12%
35 to 44	19%	18%
45 to 54	24%	23%
55 to 64	19%	18%
65 and older	24%	24%

Source: Statistics Canada (2008)

Table 2. Average Annual Donation by Age Group in Canada and Manitoba, 2006

Age Groups	Average Annual Donation of Canadians	Average Annual Donation of Manitobans
0 to 24	\$530	\$840
25 to 34	\$930	\$1,100
35 to 44	\$1,300	\$1,500
45 to 54	\$1,600	\$2,100
55 to 64	\$1,600	\$2,000
65 and older	\$1,800	\$1,900

Source: Statistics Canada (2008)

METHODOLOGY

A mixed-method approach generated a comprehensive understanding of rural and northern community foundations across Manitoba. The anticipated diversity and complexity of community foundations meant a single approach would be inadequate to capture the nuances of organizational structure, assets, and achievements. The methodology included three approaches: (i) survey of community foundations, (ii) interview with community foundation board members and/or staff, and (iii) review of Canada Revenue Agency tax records.

This project focuses solely on rural and northern community foundations in Manitoba registered with Community Foundations of Canada¹. Although private foundations and special interest/service club foundations contribute and influence communities, they are not included in the data collection, analysis, or presentation of findings.

The focus of this project is the 41 community foundations registered with Community Foundations of Canada; the project did not consider private foundations, special interest foundations or service club foundations.

Survey

To understand community foundations a 13-page survey containing 52 questions was created to gain a perspective on five main categories:

1. Board, Staff, and Community Engagement
2. Relationships and Capacity
3. Administrative Activities
4. Grant Making and Donations
5. Achievements and Looking Forward

The survey was primarily designed as a closed-ended survey whereby community foundations selected the most appropriate answer/check box. This design was selected to decrease the time required to complete the survey. The closed-ended questions were supplemented with some open-ended questions allowing community foundations to describe in detail and qualify their remarks. Where appropriate, language and answer options mirrored the Canada Revenue Agency's *Registered Charities Annual Information Return* (T3010 form).

Development of the survey was conducted in consultation with representatives from The Winnipeg Foundation, Community Foundations of Canada, and Manitoba Agriculture, Food and Rural Initiatives. Where appropriate, the community foundation survey adopted questions from two previous surveys, New Rural Economy Household Survey (New Rural Economy, 2001) and the Report on Strengths, Challenges and Opportunities of Community Development Corporations in Manitoba (Bessant & Annis, 2004).

¹ Further information on the type of foundations in Manitoba is available in Appendix A.

Surveys were distributed to all community foundations in mid-February 2009 via Canada Post and email². Community foundations were requested to complete the survey and return to the Rural Development Institute by June 10, 2009. At the deadline, 34 completed surveys were returned representing a response rate of 83% of rural and northern community foundations in Manitoba. A copy of the Community Foundation Survey is available on the Rural Development Institute's website: www.brandonu.ca/rdi.

Follow Up Interviews

Follow-up interviews were conducted to supplement local information collected through the community foundation survey. All community foundations were invited to participate in a follow up interview; 13 community foundations agreed to participate. Conversations provided an opportunity to clarify survey responses if necessary, explore local opportunities and challenges, identify community foundation partnerships, and understand the local community environment. Follow-up interviews took between 30-75 minutes to complete and were scheduled at the convenience of the participant. These interviews were conducted in June and July 2009.

Canada Revenue Agency Taxation Data

Under the *Income Tax Act*, all registered charities must make an annual submission of the T3010 form to the Canada Revenue Agency. Information provided in the annual submissions is posted publicly on the agency's website. Key information publicly available includes: foundation identification, programs, general information, compensation, and financial information. Information related to Directors Trustees in Section B and Confidential Data in Section I are not available through the Canada Revenue Agency website. By law, community foundations are required to annually submit a completed T3010 form within six months of the charity's fiscal year-end. While a majority of Manitoba's community foundations have a December year-end some have chosen a month that is more suitable to their needs. As a result, tax records for community foundations do not appear on the Canada Revenue Agency's website at a similar time.

The 2003-2008 tax records were compiled for each community foundation in Manitoba, when available. The Canada Revenue Agency information was retrieved from <http://www.cra-arc.gc.ca/tx/chrts/menu-eng.html> from January - June 2009. It should be noted that tax records were not publicly available for each community foundation in each year. Table 3 outlines the number of community foundation tax records available for each of the tax years. Due to the small number of 2008 tax records available, the focus of analysis for the Canada Revenue Agency tax records is 2003-2007.

² Electronic communications were only circulated to community foundations with an active email address. In all, 39 community foundations received the survey via email.

Table 3. Number of Community Foundation Tax Records Publically Available, 2003-2008

Tax Year	Number of Community Foundation Records Available
2008	5
2007	37
2006	40
2005	39
2004	36
2003	35

Data Considerations

The Rural Development Institute has made every attempt to ensure the data in this report is the most current, accurate, complete and comprehensive data at the time of publication. The responses to the community foundation survey and follow up interviews should be viewed as a ‘snap shot’ of perspectives and opinions as of April – July 2009.

In presenting this information, two considerations should be understood when reviewing the findings: 1) participation rates and 2) access to taxation records.

The Rural Development Institute, with the assistance of The Winnipeg Foundation, strived to achieve a comprehensive understanding of rural and northern community foundations. Of the 41 community foundations, information was collected from 34 community foundations, representing 83%. The representation of all community foundations in the Canada Revenue Agency tax records from 2003 – 2008 was also not comprehensive. Consequently, analysis of tax records only takes into consideration 37 of the 41 rural and northern community foundations. As a result, the findings generated from the Canada Revenue Agency tax data should be considered as an estimate as they do not consider all 41 rural and northern community foundations.

In the process of collecting information through the survey and the telephone interviews, the Rural Development Institute did not validate the answers provided by community foundation representatives. The report contains information the Rural Development Institute received directly from community foundation representatives.

PROFILE OF RESPONDING COMMUNITY FOUNDATIONS

The community foundation movement in Manitoba is dynamic and diverse. Community foundations are characterized by the communities and municipalities they serve and their locally established goals. The Winnipeg Foundation was established in 1921 and was the first community foundation in Canada. The movement has grown to include 41 community foundations representing rural, northern, remote, and urban communities/municipalities across the province. The catalysts for establishment of community foundations as diverse as the communities represented. From the follow up interviews conducted five themes emerged to describe the rationale for creating a foundation.

Building on the Momentum of The Winnipeg Foundation - Awareness about the existence of The Winnipeg Foundation was among the catalysts for the creation/establishment of the community foundations. This coincided well with the desire of people who wanted to serve the communities but had no means to do it. Some were made aware of and were inspired to establish community foundations after reading an article in the Winnipeg Free Press on community foundations, and the benefits associated with them. As a result, some community members took the initiative to rally community support and contacted The Winnipeg Foundation for more information.

Infrastructure to House Donations – Some community foundations came into being following bequests left by individuals or because of activities. Donations were stimulated by people's awareness of community foundations in other places.

Matching Challenge Grants from the Thomas Sill Foundation - The Thomas Sill matching fund challenge issued in 1993 was another catalyst for the creation/establishment of community foundations. In some cases, it was the major catalyst while in others it acted as an additional catalyst, especially in those communities where donations had been given by different people, or organizations, that had become aware of community foundations in other places.

Encouragement of Local Government - Community foundations in other places came into being because of, among other factors, the encouragement from the local governments, particularly at the rural municipality level.

Desire for a Local Legacy - In other places, the creation/establishment of community foundations was from the inspiration to create a legacy for some notable people in the communities.

Based on Canada Revenue Agency data 65% of community foundations in Manitoba were registered between 1990 and 1999, corresponding to the timing of the Thomas Sill Foundation matching challenge grants. The growth in the number of community foundations continues in Manitoba. Since 2000 an additional 6 community foundations have been established.

Participating Community Foundations

34 rural and northern community foundations participated in the survey component of the project. They include:

1. Beautiful Plains Community Foundation Inc.
2. Big Grass Community Foundation
3. The Boissevain & Morton Foundation Inc.
4. Brandon Area Community Foundation
5. Brokenhead River Community Foundation
6. Carberry and Area Community Foundation Inc.
7. Carman Area Foundation
8. Cartwright & Area Foundation Inc.
9. Dauphin & District Community Foundation
10. Glenboro Area Foundation Inc.
11. Grandview and District Community Foundation
12. Interlake Community Foundation
13. The Killarney Foundation Inc.
14. Living Legacy Community Foundation
15. Minnedosa & District Foundation Inc.
16. Morden Area Foundation
17. North Norfolk-MacGregor Foundation Inc.
18. Northern Neighbours Foundation
19. Oak Lake & Area Foundation
20. Pilot Mound & District Foundation
21. Plum Coulee Community Foundation
22. Community Foundation of Portage and District Inc.
23. Reston & Area Foundation
24. Roblin District Community Foundation Inc.
25. Selkirk & District Community Foundation
26. Souris Glenwood Community Foundation
27. The Steinbach Community Foundation
28. Community Foundation of Swan Valley Inc.
29. Thompson Community Foundation
30. Tiger Hills Community Foundation
31. The Virden Area Foundation Inc.
32. Wawanesa Foundation
33. Westshore Community Foundation
34. The Winkler Community Foundation

Thirteen community foundations elected to participate in a follow up interviews. Participants included:

1. Big Grass Community Foundation
2. Carberry and Area Community Foundation Inc.
3. Carman Area Foundation
4. Dauphin & District community Foundations
5. The Killarney Foundation Inc.
6. Morden Area Foundation
7. North Norfolk-MacGregor Foundation Inc.
8. Plum Coulee Community Foundation
9. Community Foundation of Portage and District Inc.
10. Selkirk & District Community Foundation
11. Thompson Community Foundation
12. The Virden Area Foundation Inc.
13. Wawanesa Foundation

Based on the information received from the 34 community foundations, 183 communities/municipalities are being served (see Appendix E for a complete list of communities/municipalities served). In completing the annual T3010 forms, community foundations are asked to identify the area of activities that best represents their initiatives in the fiscal period. A maximum of three areas of activities are permitted on the forms. When considering only the primary area of activities reported in 2007 for Manitoba community foundations the three most frequent responses were: community recreational facilities/trails; support services for charitable sector; and hospitals.

SCAN OF RURAL AND NORTHERN COMMUNITY FOUNDATIONS

Assets, Endowments, and Grants

The following section outlines rural and northern community foundation assets, investments, operating costs, fundraising, and challenges in endowment building. Although community foundations noted challenges in endowment building the Canada Revenue Agency tax records indicate the total assets in rural and northern community foundations has been growing since 2003.

Financial information is based on public tax records available through Canada Revenue Agency over a five year period from 2003-2007. Within each year there are a different number of tax records available. Table 4 outlines the availability of tax records by community foundation (■ indicates tax records available from Canada Revenue Agency). A lack of a tax record does not imply a community foundation did not submit their required documents to the Canada Revenue Agency, rather it implies the documents were not publically available at the time of analysis.

Table 4. Tax Record Availability

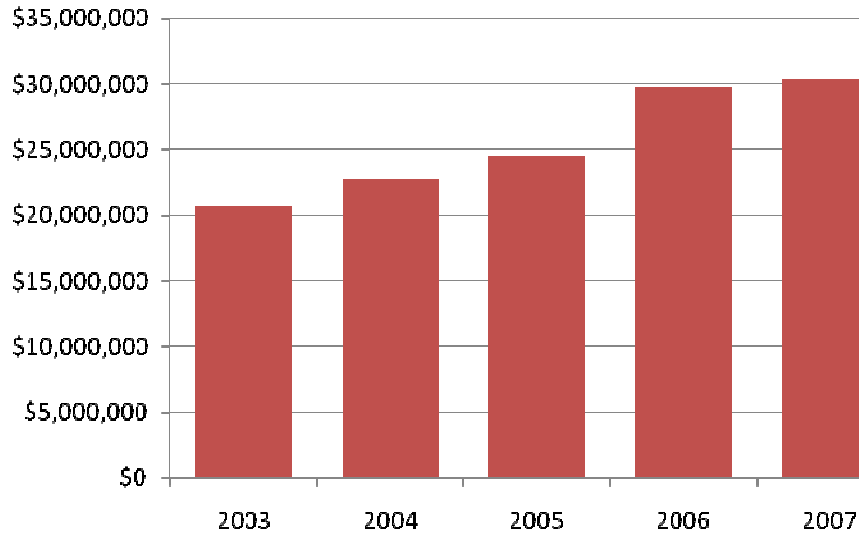
	2000	2001	2002	2003	2004	2005	2006	2007
Altona Community foundation Inc.	■	■	■	■	■	■	■	■
Beautiful Plains Community Foundation Inc.	■	■	■	■	■	■	■	■
Big Grass Community Foundation Inc.	■	■	■	■	■	■	■	■
Brokenhead River Community Foundation Inc.	■	■	■	■	■	■	■	
Carberry and Area Community Foundation, Inc.	■	■	■	■	■	■	■	■
Carman Area Foundation Inc.	■	■	■	■	■	■	■	■
Community Foundation of Portage and District, Inc.	■	■	■	■	■	■	■	■
Community Foundation of Swan Valley Inc.							■	■
Dauphin & District Community Foundation Inc.	■	■	■	■	■	■	■	■
Elkhorn & Area Foundation Inc.	■	■	■	■	■	■	■	■
Grandview & District Community Foundation Inc.	■	■	■	■	■	■	■	■
Holland & Area Community Foundation Inc.							■	■
Living Legacy Community Foundation Inc.	■	■	■	■	■	■	■	■
Minnedosa & District Foundation Inc.	■	■	■	■	■	■	■	■
Morden Area Foundation Inc.	■	■	■	■	■	■	■	■
North Norfolk-MacGregor Foundation Inc.	■	■	■	■	■	■	■	■
Northern Neighbours Foundation, Inc.	■	■	■	■	■	■	■	■
Oak Lake & Area Foundation Inc.	■	■	■	■	■	■	■	■
Pembina-Manitou Area Foundation Inc.	■	■	■	■	■	■	■	■

Pilot Mound & District Foundation Inc.	■	■	■	■	■	■	■	■
Plum Coulee Community Foundation Inc.			■	■	■	■	■	■
Roblin District Community Foundation Inc.					■	■	■	
Selkirk & District Community Foundation Inc.	■	■	■	■	■	■	■	■
Souris Glenwood Foundation Inc.	■	■	■	■	■	■	■	■
Sturgeon Community Foundation Inc.	■	■	■	■	■	■	■	■
The Boissevain & Morton Foundation Incorporated	■	■	■	■	■	■	■	■
The Brandon Area Community Foundation Inc.	■	■	■	■	■	■	■	■
The Cartwright and Area Foundation Inc.	■	■	■	■	■	■	■	■
The Glenboro Area Foundation Inc.	■	■	■	■	■	■	■	■
The Interlake Community Foundation Inc.	■	■	■	■	■	■	■	■
The Killarney Foundation Inc.	■	■	■	■	■	■	■	■
The Reston and Area Foundation Inc.					■	■	■	■
The Southwest Manitoba Regional Foundation	■	■	■	■	■	■	■	■
The Steinbach Community Foundation Inc.	■	■	■	■	■	■	■	■
The Thompson Community Foundation	■	■	■	■	■	■	■	■
The Virden Area Foundation Inc.	■	■	■	■	■	■	■	■
The Winkler Community Foundation Inc.	■	■	■	■	■	■	■	■
Tiger Hills Community Foundation Inc.	■	■	■	■	■	■	■	■
Westshore Community Foundation Inc.	■	■	■	■	■	■	■	■

Source: Canada Revenue Agency (2009)

The 2007 total assets among the 37 community foundations in Manitoba were \$30,354,278. Since 2003, the total assets in Manitoba have increased by almost \$10 million (see Figure 1). Total assets, as defined by the Canada Revenue Agency, are the sum of bank accounts, cash, investments (short-term and long-term), amounts receivable, investments in arm's length parties, inventories, and capital assets (at cost or fair market value).

Figure 1. Total Assets in Manitoba Community Foundations, 2003-2007



Source: Canada Revenue Agency, 2003-2007

In 2007, the average total assets, per foundation of rural and northern community foundations, were \$843,174.39. Since 2003, the average total assets per foundation of rural and northern community foundations have increased by approximately 38% (see Table 5).

Table 5. Community Foundation Total and Average Assets, 2003-2007

Tax Year	Total Assets Reported	Average Total Assets per Foundation	Smallest Community Foundation Assets Recorded	Largest Community Foundation Assets Recorded
2003	\$20,721,412	\$609,453.29	\$0	\$2,118,396
2004	\$22,701,952	\$630,609.78	\$831	\$2,224,588
2005	\$24,456,010	\$660,973.24	\$4,373	\$2,451,986
2006	\$29,706,617	\$781,753.08	\$17,560	\$3,303,136
2007	\$30,354,278	\$843,174.39	\$13,088	\$3,784,899

Source: Canada Revenue Agency, 2003-2007

Assets of Manitoba’s rural and northern community foundations are invested in a variety of different investment types (see Table 6). Approximately two thirds of the community foundations have short-term/GIC investments with approximately 37% of their assets invested in this type. Bond and Canadian equities are the second and third largest average percent of assets investment types.

Table 6. Community Foundation Total and Average Assets

Asset Investment Type	Number of Community Foundations	Average Percent of Assets Invested
Short term/GICs	20	37%
Bonds	10	21%
Canadian Equity	10	17%
US Equity	7	6%
International Equity	7	5.9
Other [†]	34	*

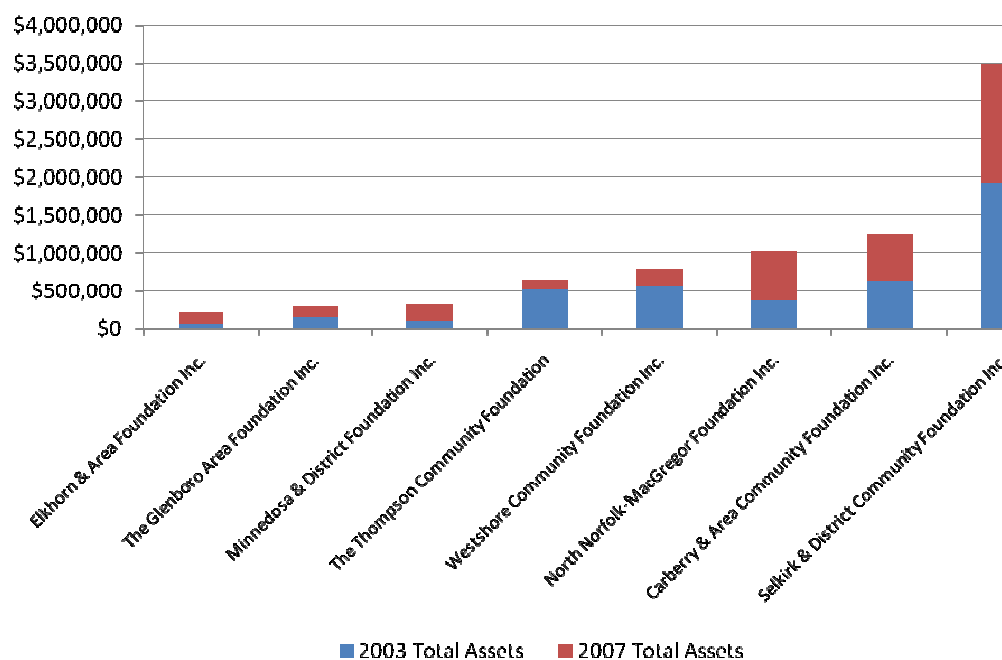
Source: Community Foundation Survey

† Includes assets in savings accounts, chequing accounts, invested with The Winnipeg Foundation (unspecified type of investment), Great West Life (unspecified type of investment), and real estate.

* Unable to determine median percent of assets invested in other areas due to diversity of responses.

In general, the total assets of community foundations have increased during the period of 2003-2007. Figure 2 illustrates the growth of total assets in eight community foundations: Elkhorn and Area Foundation, Glenboro Area Foundation, Minnedosa and District Foundation, The Thompson Community Foundation, Westshore Community Foundation, North Norfolk-MacGregor Foundation, Carberry and Area Foundation, and Selkirk and District Community Foundation. Eight community foundations were randomly selected for presentation.

Figure 2. Illustrative Growth of Total Assets, 2003-2007



Source: Canada Revenue Agency, 2003-2007

Community foundations utilize a number of methods to increase their local endowments. The survey asked community foundations to identify the methods currently being utilized and methods previously utilized. The most frequently currently used public awareness method of increasing endowments is advertisements, posters, flyers, and radio or television commercials. Table 7 describes the current and previous methods for increasing local endowments.

Table 7. Illustrative Growth of Total Assets, 2003-2007

Method	Current	Previous
Advertisements, posters, flyers, radio or TV commercials	12	1
Targeted corporate donations/sponsorships	6	3
Fundraising dinners, galas, or concerts	4	4
Mail campaigns	3	5
Door-to-door solicitation	2	2
Targeted contacts	2	4
Tournaments or sporting events	2	2
Others	2	0
Collection plates and boxes	1	2
Planned giving programs	1	2
Walk-a-thons or bike-a-thons	1	2
Auctions	0	2
Bingo and casino nights	0	2
Draws or lotteries	0	2
Fundraising sales (i.e. cookies, chocolates)	0	1
Telephone solicitation	0	1

Source: Community Foundation Survey

Moreover, community foundations expressed challenges in building endowments. The challenges have been categorized into three main areas: awareness of the community foundation, local competition for donations, and internal operations.

Awareness - A lack of awareness of what a community foundation is and what it does was a major issue that was said to hamper growth of endowments. The general concern was people in the communities do not donate/leave their bequests due to either lack of awareness of the existence of a foundation in their communities or not being sure of its roles.

“Lack of awareness of what a community foundation is or does”

“No one knows who we are”

The community foundations identified the reason for this dilemma as being their lack of appropriate and adequate mechanisms to spread the information.

“Increasing public awareness to increase endowment building is a constant challenge”

“I think our biggest challenge is informing people what we do and how we serve the community. If citizens understood they would give to the foundation”

Local Competition - Another challenge cited by the community foundations was the presence of local competition in their respective communities. The result is multiple organizations soliciting money from the same donors. This has been a challenge with regard to both endowment growth and community awareness. This challenge is more pronounced where the community is small, and the number and awareness about other organizations is larger.

“We are in competition with other projects that are more well known...”

“Too much competition regarding fundraising in our area”

“Small community--many organizations looking for dollars”

“There are a number of other organizations in the area that solicit the same individuals/businesses”

However, some rural and northern community foundations had an opposite overview with regard to competition. Rather, they made an impression of being well established in their communities with a satisfactory support.

“We do not actively compete with charitable fundraisers, our grants attract donors”

“The community is supportive. Our Foundation is on the Donor's Choice list each year”

Internal Operations - While some community foundations saw not having enough board members as their issue of concern, others cited lack of time on the part of the board members as a hindrance to an effective solicitation of funds. They became aware that some of the board members have other commitments and try the best they can to allocate their time to the community foundation. This is more apparent in those community foundations that cannot afford to hire staff and are under-staffed.

“At this time we are unable to fill our board. If we had more members we would be able to work more in the community to raise funds”

“A lack of time to make continuous personal contacts”

“Because we are a volunteer board with only a part time staff position we find our allotted time used up with day to day procedure and not always enough allotted time to building funds”

Meanwhile, other community foundations experienced the challenge of insufficiently active board members when it came to approaching potential donors individually for the sake of making them [more] aware of the community foundations and encouraging them to make donations.

“Finding board members who will approach potential donors individually to educate them about Foundations and encourage a donation”

Moreover, the community foundations mentioned the lack of financial resources as their other obstacle. In particular, they explained that their financial shortages prohibit them from raising more endowments.

“Not having financial resources to actively pursue more endowments”

Among the other challenges mentioned by the community foundations was lack of networking with people who can give them good leads or, at least, sell the idea of community foundations to other people, such as professional advisors to encourage charitable planned giving to their clients. Some cited the current economic climate as having distanced donors from them even with the hope the situation will get back to normal as soon as markets recover.

In 2007, rural and northern community foundations in Manitoba received in excess of \$2.5 million in total eligible amount of tax receiptable gifts (see Table 8). Total eligible amount of tax-receipted gifts is the sum of all gifts received by a community foundation during the fiscal period for which tax receipts were issued. This figure does not include gifts received from other registered charities. The total eligible amount of tax receiptable gifts increased by over 120% from 2003-2007 and the average amount of tax receiptable gifts increased by about 95%.

Table 8. Total Eligible Amount of Tax Receiptable Gifts, 2003-2007

Tax Year	Total Eligible Tax Receiptable Gifts	Average Amount of Tax Receiptable Gifts per Foundation	Lowest Amount of Tax Receiptable Gifts Recorded by a Foundation	Highest Amount of Tax Receiptable Gifts Recorded by a Foundation
2003	\$1,241,471	\$39,108.47	\$0	\$520,929
2004	\$1,616,156	\$46,175.89	\$42	\$402,762
2005	\$1,822,992	\$52,085.49	\$340	\$272,486
2006	\$2,966,733	\$78,071.92	\$0	\$704,153
2007	\$2,740,073	\$76,113.14	\$155	\$555,192

Source: Canada Revenue Agency, 2003-2007

Based on survey responses, the average number of gifts received by rural and northern community foundations in Manitoba was 22 gifts; an increase of 5 gifts from the 2004 average of 17 gifts. During the period of 2004-2008, every community foundation participating in the survey received at least one gift each year. In 2008, one community foundation received 80 gifts. The most frequent source of gifts to foundations was individual donations, reported by 97% of participating community foundations. Additional sources of gifts included local businesses (41%), private foundations (18%), government (6%), planned gifts/insurance policies (6%), and other community foundations (6%).

Community foundations have actively contributed to the communities and regions they serve. In 2007, approximately \$1.2 million was distributed in the forms of grants to charitable organizations (see Table 9). All community foundations with publically available tax records reported providing at least one gift to a qualified donee since 2003. The average amount granted to charitable organizations per foundation in 2007 was \$38,467.74, an increase of about 14% over the five-year period. The total grants to charitable organizations exclude enduring property amounts a community foundation designates as specified grants.

Table 9. Total Amount Grants Paid to Charitable Organizations (excluding enduring property), 2003-2007

Tax Year	Total Amount of Grants Paid to Charitable Organizations	Average Total Amount of Grants per Foundation	Smallest Amount of Grants Paid by a Community Foundation	Largest Amount of Grants Paid by a Community Foundation
2003	\$979,727	\$33,783.69	\$1,300	\$149,011
2004	\$927,517	\$31,983.34	\$1,345	\$97,553
2005	\$1,105,903	\$34,559.47	\$649	\$214,519
2006	\$1,092,064	\$31,201.83	\$515	\$100,725
2007	\$1,192,500	\$38,467.74	\$200	\$137,272

Source: Canada Revenue Agency, 2003-2007

Over two-thirds of rural and northern community foundations indicated having at least one targeted or designated endowment fund with special criteria. Endowment funds for scholarship were cited by 71% of community foundations, followed by designated funds (68%), general community building (59%), and donor advised (47%).

Community foundations noted three distinct reasons for fundraising. Half of rural and northern community foundations fundraise for operation costs and 50% noted fundraising to increase their local endowments. In addition, 26% of the community foundations indicated their fundraising efforts are utilized for flow through grant making.

Furthermore, rural and northern community foundations noted numerous operating costs. Table 10 outlines the percentage of community foundations reporting each type of cost.

Table 10. Operating Costs of Community Foundations

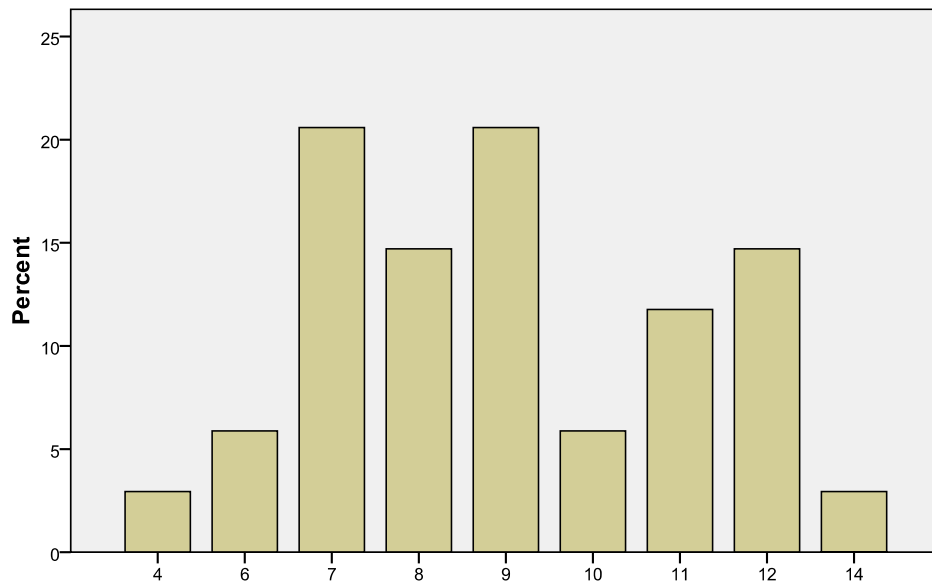
Type of Cost	% of Foundations
Advertising and promotion	97%
Licenses, memberships, and dues	85%
Office supplies and expenses	85%
Professional and consulting fees	74%
Salaries, wages, benefits and honoraria	59%
Interest and bank charges	50%
Travel and vehicle	32%
Education and training for staff/volunteers	32%
Research grants and scholarships as part of charitable program	21%
Occupancy costs (rental, utilities, building maintenance, taxes, etc.)	12%
Amortization of capitalized assets	9%

Source: Community Foundation Survey

Foundation Governance

As seen in Figure 3 below, the number of board members of the 34 community foundations ranged from the minimum of 4 to the maximum of 14. Seven community foundations (approximately 21%) reported to have 7 board members and another 7 community foundations reported to have 9 board members. One community foundation reported to be having the least number of board members (4) and another community foundation reported the highest number of board members (14) on its board. Furthermore, 5 community foundations (almost 15%) said they have 8 board members and another 5 community foundations (also about 15%) said they have 12 board members on their boards; whereas the responses of having 6 to 10 board members were given by 2 community foundations on either case. Moreover, 4 community foundations (about 12%) reported to have 11 board members. The overall average number of board members stood at 9. In addition, about 35% of the community foundations reported to have vacancies in their boards, with the remaining 65% answering that they do not have a shortage of board members whatsoever.

Figure 3. Number of Board Members of the Community Foundation

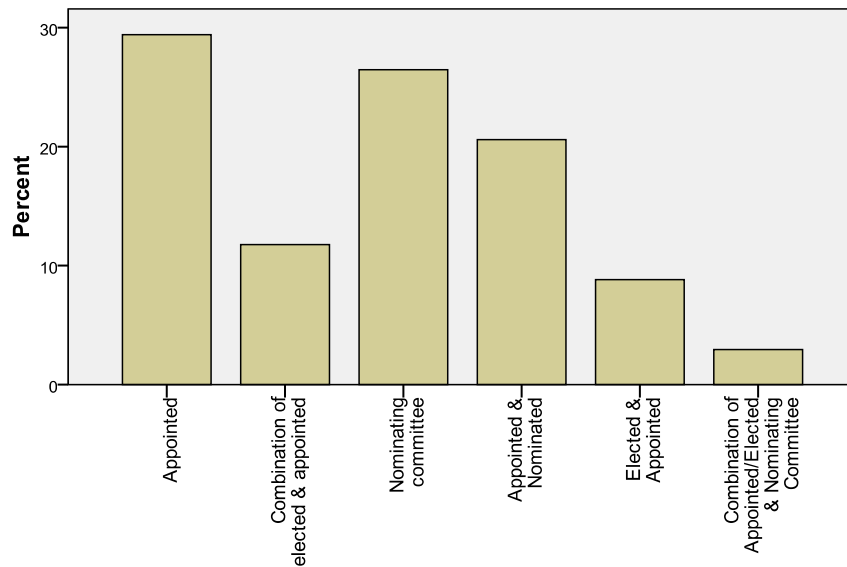


Source: Community Foundation Survey

In terms of gender composition of the board members, the majority of the community foundations said they have more males (55%) compared to females (45%) on their boards. Additionally, looking at the age composition of these board members, 11 community foundations reported to have an average of one young adult (19 to 35 years of age) board members within the overall range of 0 to 3. In addition, all the 34 community foundations reported to having an average of 7 adult (35 to 64 years of age) board members. The overall range of 2 to 10 and 27 community foundations said they have, on average, 2 seniors (65 years or older) members on their boards (the minimum and maximum numbers reported for this age group was 0 and 5 respectively). Notably, none of the community foundations reported to be having the youth (less than 18 years of age) among their board members.

The majority of the community foundations, represented by about 29%, said their board members are selected through appointment; followed closely by selection via nominating committees at the rate of around 26% (see Figure 4). Furthermore, approximately 21% of the community foundations reported that their board members are selected through a combination of both appointment and their nomination committees. In other community foundations, the board members are both elected and appointed (about 12%), as well as both appointed and selected by the nominating committees (about 9%). The least means of selecting board members used include a combination of both elected and appointed on one hand, and nominating committees on the other hand.

Figure 4. Method of Selected Board Members



There also were varying responses with regard to the maximum number of terms that can be held by a board member. While about 41% of the community foundations reported to have no limit, the rest of them had varying periods of limits. A maximum number of two terms was shared by most of the community foundations as indicated by the 47% response rate recorded. In addition, only 9% of the community foundations reported to have a maximum of three terms for each of their board members. Lastly, slightly less than 3% of the community foundations said they have ‘other’ term limits for each of their board members.

Likewise, just above 50% of the community foundations stated the duration of terms was for three years. Other lengths of terms described include two years, four years, and unlimited number of years - each rated at about 10% by the community foundations. Finally, two community foundations each had a pick of 1 and 5 years for their length of terms - representing less than 5% for each one of them of the responses given.

Of the 34 community foundations, 11 (approximately 32%) stated their boards meet every couple of months (2 to 4 times per year). Also, 9 community foundations (around 26%) reported a 10 times per year frequency; 7 community foundations (approximately 21%) reported their boards meet every other month (6 times per year); 5 community foundations (about 15%) meet 12 times per year (once a month)

frequency; and, lastly, 2 community foundations (just about 6%) reported to be having different arrangements.

Again, of the 34 community foundations, only 26 of them (76%) hold an annual general meeting. In other words, 8 community foundations (24%) do not conduct annual general meetings. On top of this, 20 of the 26 community foundations that hold annual general meetings have confirmed that they invite members of the public to attend; while the remaining 6 community foundations have a closed-door annual general meeting.

Furthermore, the community foundations were also asked to indicate the types of committees that their boards regularly use. Hereby, 24 indicated they use Grant Committees; 21 reported to be using Audit/Finance Committees; 11 confirmed they make use of Development Committees. In addition, 17 community foundations reported that they use other different committees that include Bursary Fund Development, and Special Events committees.

In an attempt to explore further on the issue of foundation governance, the community foundations were also asked to provide the numbers of board members and community volunteers engaged with each of these committees. As presented in Table 11 below, the Audit/Finance Committees were reported to be composed of an average of 3 board members, whereby the minimum and maximum numbers of the board members in these committees ranged from 1 and 11 respectively. In addition, the same committees also reported to be composed of an average of 1 community volunteer, with the minimum and maximum number of the community volunteers being 0 and 3 respectively. What is important to note here is that 86% of the community foundations reported to have no community volunteers on these committees.

Table 11. Board and Volunteer Committee Members Composition

Committee Name	Median Number of Board Members	Range of Board Members	Median Number of Community Volunteers	Range of Community Volunteers
Audit/Finance	3	1 – 11	1	0 – 3 [†]
Grant	4	1 – 12	4	0 – 10
Development	3	1 – 11	1	0 – 1
Other	3	1 – 10	3	0 – 5

[†] 86% of CF had no volunteers on committee

Source: Community Foundation Survey

The Grant Committees were reported to be composed of, on average, 4 board members and 4 community volunteers. The numbers of board members on these committees were specified to range from 1 (minimum) to 12 (maximum), while those of the community volunteers were reported to range from 0 (minimum) to 10 (maximum).

Additionally, the average numbers of board members and community volunteers on the Development Committees was reported to be 3 and 1 respectively, with the minimum and maximum numbers for both of them being 1 and 11 as well as 0 and 1 respectively (see Table 11 above). In their collectivity, the other committees – i.e. Bursary, Fund Development, and Special Events – were reported to be having, on average, 3 board members and 3 community volunteers each with the corresponding ranges being from 1 to 10 and 0 to 5 respectively.

When asked whether the boards are involved in strategic planning, whereby only 32 responded, 17 community foundations gave a 'yes' answer while the remaining 15 answered 'no'. Again, only 18 (roughly 56%) of the 32 community foundations provided answers regarding the scope of their planning activities. Of these, 1 implements long-term (3 to 5 years) plans, 4 implement short term (1 year) plans, and the remaining 13 community foundations implement both short term and long term plans. Moreover, in terms of how closely these community foundations follow these plans 13 responded they 'somewhat' follow their plans. One community foundation gave a 'not very closely' response and two gave a 'very closely' response.

Finally, as far as foundation governance is concerned, the community foundations were again asked to describe the purposes of their strategic plans. Only 20 community foundations (almost 59%) responded to the question. Much as their responses varied, there seems to be a substantial overlap of the purposes described. Below is a list of these purposes, with the number of community foundations sharing similar purposes in brackets:

- Both investment and asset management; grant making; board succession planning; strategic fund development; and staffing (1)
- Both investment and asset management, and grant making (2)
- Both board succession planning; strategic fund development; and staffing (1)
- Both investment and asset management; grant making; and board succession planning (1)
- Both investment and asset management; grant making; and strategic fund development (3)
- Strategic fund development (2)
- Strategic fund development, and others different from the ones mentioned here (2)
- Others different from the ones mentioned here (1)
- Both investment and asset management; and strategic fund development (1)
- Both investment and asset management; grant making; board succession planning; strategic fund development (1)
- Investment and asset management, and others different from the ones mentioned here (1)
- Investment and asset management (1)
- Both investment and asset management; grant making; board succession planning; and others different from the ones mentioned here (1)
- Grant making, and strategic fund development (3)

Human Resources and Administrative Activities

This section highlights challenges and opportunities related to staff, professional or contract services, volunteers, record keeping, and board capacity.

Over half (55%) of rural and community foundations participating in the survey employed at least one staff member; however, staff positions tend not to be full-time positions. Only two community foundations reported employing a full-time staff member. It should be noted community foundations with full-time staff members also each employed one additional part-time staff member. Thirteen community foundations reported hiring one part-time staff member while five community foundations utilize one casual staff member to perform administrative activities. In addition to staff members community foundations also reported using professional or contract services and volunteers to assist in performing their administrative activities.

Approximately 75% of community foundations referenced hiring professional or contract services in the past year. The most common services hired/contracted for were auditors (62%), lawyers (26%), accountants (15%), and investment consultants (21%). Slightly over one-third (38%) of community foundations utilized more than one type of professional or contract services in the past year. In some instances community foundations reported the use of voluntary professional services, such as a local lawyer providing their services without charge. In addition to staff and professional or contract services community foundations indicated an involvement of local volunteers. Fifty percent of community foundation reported involving volunteers on organizational committees. 107 volunteers were identified among the 16 community foundations utilizing volunteers. The average number of volunteers involved with each community foundation is 4 and the number ranged from 1 – 30 volunteers.

A mixture of staff, professional or contract services, and volunteers indicative of who performs administrative activities. Community foundations reported board members (41%), staff (35%), a combination of board and staff (12%), or professional/contract services (12%) as performers of the administrative activities accordingly. The number of board members involved in the administrative activities ranged from 1-8 (average of 4 board members).

The method for record keeping varied across community foundations. Half of community foundations utilize a combination of manual and computerized record keeping (see Table 11). The remaining community foundation record keeping was completely computerized (30%), completely manual (18%), or conducted by a consultant (3%). For community foundations using completely computerized record keeping the software programs utilized were: Giftworks, MYOB, Powerchurch, QuickBooks, and Simply Accounting. Three community foundations reported also using Microsoft Office to support one of the software programs listed above. One community foundation noted that it will be soon switching to Income Manager Online Program.

Table 12. Method of Record Keeping

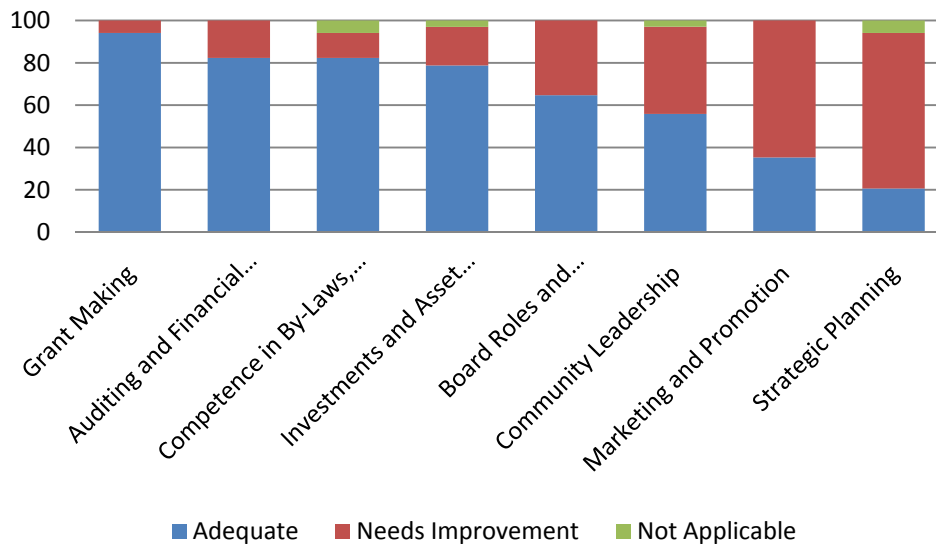
Type of Record Keeping	% of Community Foundations
Completely manual	18%
Completely computerized	30%
Combination of manual and computerized	50%
Consultant	3%

Source: Community Foundation Survey

Board Capacity and Challenges

Community foundations were also asked to rank the capacities of their boards in eight areas as either adequate, needs improvement, or not applicable (see Figure 5). The three capacities ranked with the highest percent of ‘adequate’ responses among community foundations were grant making (94%), auditing and financial reporting (82%), and competence in by-laws and constitutions (82%). The three capacities ranked with the lowest percent of ‘adequate’ responses were community leadership (56%), marketing and promotion (35%), and strategic planning (21%).

Figure 5. Self-Reported Board Capacities in Percents



Source: Community Foundation Survey

Through both the survey and follow up interviews community foundations highlighted areas that they find challenging. Table 13 outlines the most challenging issues facing the administration of community foundation from the survey. Community foundations illustrated challenges and opportunities related to human resources, financial resources, awareness of foundations, operational structures and support, skills and capacities. Details of the challenges and opportunities are listed below.

Table 13. Most Challenging Issues Facing the Administration of your Community Foundations

Administrative Issues	Percent
Accounting	44%
Donor Relations	41%
Policy Development	27%
Investments	27%
Canada Revenue Agency Reporting	24%
Other [†]	24%
Grant Making	21%
Tax Receipting	9%
Office space	9%

Source: Community Foundation Survey

[†] Other comments include: funding for administration, board succession, fund development, operating funds, time to complete activities, marketing, finding new or additional volunteers/board members, public relations, awareness in the community.

Human Resources - Community foundations acknowledge the support of board members and volunteers. The willingness of people to volunteer is an opportunity for the community foundations, particularly appreciated in terms of cutting down the administration costs. Concern of how to balance the use of volunteers with volunteer burnout was expressed. Often board members and volunteers are active members of the community, which limits their time availability to the foundation. Other community foundations noted the need for 'new blood' on their boards.

Community foundations voiced a concern for administration costs as they relate to staffing. The ability to hire a staff person and provide a competitive salary were common worries. Community foundations are also concerned with the shortage of qualified people within their communities to assist with challenging issues, especially paperwork.

Awareness of Foundations - Many community foundations stressed the lack of awareness of community foundations as a challenge. For communities with expanding populations the challenge has been to make the new residents familiar with community foundations. However, even community foundations with a long history still noted encountering challenges surrounding people's awareness about the role and purpose of the community foundation.

Organizational Structures/Supports – Community foundations acknowledged the organizational resources available from Community Foundations of Canada, such as guidelines. With the supports available through Community Foundations of Canada, a need was expressed for additional organizational supports to elevate community foundations to increased effectiveness and efficiency. The additional resources mentioned by the community foundations were in the direction of assisting them with becoming more effective with managing volunteers and staff

members, attaining and maintaining effective publicity, and being exposed to technology training.

The existence of office space in a convenient location in terms of visibility and accessibility was noted as an asset. Lack of office space has forced some community foundations to operate from the homes of those who volunteer for office space. However, even though this helps to cut down operation costs since it is usually a free office space, it makes the community foundations less visible and accessible by the community thus affecting their grant making and general publicity.

Skills and Capacities – Community foundations described a continual need for training and skill development opportunities for their board and staff members on time management, publishing software, and accounting (both software and standard accounting procedures). Again, some of the community foundations were doubtful of their ability to accommodate future growth as their assets increase, and acknowledged their lack of better ways for keeping records that poses difficulties when it comes to retrieving the information.

Financial Resources - There was an expression of the need for financial support in terms of promotional budget to afford local printing, publishing software, as well as building and maintaining websites. Moreover, the community foundations are seeking financial support for administrative purposes such as data management, administrative know-how for receipting, and accounting software to manage finances.

Relationships and Capacity

Internet Connectivity and Accessibility

This section explores the extent to which community foundations have access to the Internet and how they maintain the service. All the 13 community foundations interviewed by telephone responded that they have access to high-speed Internet with the majority of them using broadband, followed by DSL, wireless and cable. No rural or northern community foundation utilizes a T1 or satellite connection.

Moreover, 12 out of the 13 community foundations gave information on the number of their board members who have access to high-speed Internet. Of them, 7 (58%) said all board members have access to high-speed Internet while the remaining 5 (42%) community foundations said only an estimate of 85% of their board members had access to high-speed Internet. The chief means that the latter use to communicate with the non high-speed Internet board members is emailing with one community foundation saying it additionally uses its website to pass on the communication. However, one community foundation said that the only means it uses is personal delivery.

Again, 7 of the 13 community foundations (54%) admitted that all the communities/municipalities they serve have access to high-speed Internet with 5 of them saying not all communities/municipalities served have the access and 1 community foundation not being sure about the status of the communities/municipalities it serves as far as high-speed Internet is concerned. Furthermore, 11 out of 12 community foundations (92%) said that high speed Internet is available at their local library. One community foundation added high-speed Internet is also available at school and the local employment

centre. The remaining community foundation said high-speed Internet is available only at the school library, town office and Internet café.

Finally, 10 of the 13 community foundations (77%) confirmed having a maintained Internet website as opposed to the remaining 3 community foundations. Again, 10 community foundations said they have access to trained people in their communities to help maintain their websites. One community foundation said it did not have the access while the remaining two were not sure whether the access to trained people was at their disposal in their communities.

Financial and In-kind Support Received by the Community Foundations

The community foundations were asked to describe their financial and in-kind support received and to clarify whether this funding is regular versus one-time. Most of the 13 community foundations that provided their answers through the telephone interviews said they receive both regular and one-time financial support. The regular financial support comes from anonymous donors, with each donor specifying the purpose of the fund and the number of years they will donate. Some community foundations also receive regular funding from certain local credit unions for specified purposes, such as to produce brochures and annual reports. They also receive regular funding from The Winnipeg Foundation and Manitoba Hydro for administrative purposes.

The community foundations usually receive one-time financial support from private foundations, organizations, and businesses. Additionally, memoriam donations and gifts from different people and defunct organizations in the areas where the community foundations exist are also a mentioned component of the one-time source of funding for the community foundations. Other major sources of one-time financial support include donations from former residents and bequests from the residents who have passed away. Additionally, community foundations recognize the financial support that they receive from the Community Foundations of Canada and Thomas Sill Foundation from time to time.

On the other side, 7 of the 13 community foundations confirmed that they receive in-kind support. This support includes such things as free office space from the town/city councils and local businessmen, provision by some of the board members of their own office space and equipment such as computers to be used by the community foundations, and policy template (among other resource materials) from the Community Foundations of Canada. One of the community foundations also receives free expert services in terms of website maintenance and discounted paid expert service in terms of auditing.

Relationships with Other Community Foundations

Twelve of the 13 community foundations confirmed to be having either formal or informal relationships with other community foundations. Below are the relationships described:

“We have a good relationship with The Winnipeg Foundation - we view them as the head office. We also have a good relationship with Community Foundations of Canada as they provide us the answers we need”

“We belong to the Community Foundations of Canada”

“We have relationships with 4 community foundations & The Winnipeg Foundation”

“We have relationships with the Community Foundations of Canada, Manitoba Hydro, and The Winnipeg Foundation”

“We have formal relationships with The Winnipeg Foundation and the Thomas Sill Foundation”

“We have a formal relationship with The Winnipeg Foundation”

“We have a relationship with the 3 Community Foundations on consultation basis.

“Informal relationships 2 community foundations on administrative ideas”

“We have informal with other community foundations at workshops”

Benefits of Sharing Resources or Collaborating with other Community Foundations

All community foundations interviewed via telephone confirmed recognizing the benefits of sharing resources or collaborating with other community foundations. The most appreciated benefit is networking whereby they are able to compare and exchange ideas and give each other referrals about people who may like to help; and, sometimes when questions arise such as on matters regarding policy and procedure, board members would connect with each other to solicit answers. This networking has been made possible by the fact that the community foundations do not compete with each other and do not see the need of reinventing the wheel, which in turn saves them ‘unnecessary’ costs and provides them, especially the younger foundations, with knowledge and expertise from more experienced foundations such as The Winnipeg Foundation. Other community foundations have gone as far as to sit around a table and ponder about the idea of having one person to do their accounting in a more professional manner.

Despite recognizing the associated benefits, a few community foundations also identified the risk with sharing resources or collaborating with other community foundations. The generally shared fear is losing their identity in the communities under a situation whereby the level of collaboration with other community foundations is high, especially in terms of fundraising, thus possibly making the public lose interest in them thinking that they are simply a private entity.

Community Foundations' Relationships with Other Groups and Municipalities

Out of the 13 community foundations, 11 of them acknowledged to have formal or informal relationships with other groups, municipalities, or associations. These relationships, as some of them are specified below, are based on the perspective of sharing various information, office, website and even box office:

"We have relationships with the city, service clubs, & Neighborhoods Alive"

"We have relationships with the three municipalities, the local Chamber of commerce (sharing office), and the local Rotary Club"

"We have relationships with the municipality and town in terms of representation in the board and in terms of sharing a website"

"The mayor and two reeves are part of the nominating committees."

"Working to strengthen relationship with Water Stewardship and media"

"School Division by getting ArtsSmarts incorporated into curriculum"

"We have informal and formal relationships with anyone we grant funds to, especially with non-profit groups"

"A partnership with Lake Winnipeg Research Consortium with The Winnipeg Foundation & Thomas Sill Foundation studying local water project. "

Special Initiatives

When asked about whether they have acted as leaders in community projects, 6 of the 13 community foundations that were interviewed reported to have never undertaken the initiative. Some of the reasons cited for this included low population size within communities, desire to remain proactive rather than reactive, simply wanting to maintain a low profile, or having a rather slow inflow of funds. The remaining 7 community foundations have acted as leaders in community projects. Below are their responses:

“We provided capital and operating funding to turn a school building into a community center that worked for 12 years until it was demolished recently. We are also supporters of a recreational complex for a 5 years period until 2010. Finally, we are providing \$3,000 for placement of an MRI (diagnostic machine) in a hospital by 2012.”

“Our community foundation provides scholarships to student to obtain MD or RN and practice in community. We also lend money to other community groups at lower interest rates than bank.”

“We have played a leading role in the construction of a new Youth for Christ building, undertaking the local water project, coordinating a new conference to let the 5 community charity organizations which received \$120,000 each say how they are going to spend the money and also to promote the fact that the donation (\$600,000) was significant and inspire others to donate (we had a national and international coverage).”

“When we hear something going on that we can contribute to we inform them that they can make grant applications to us.”

“We are incorporating the ArtsSmarts program into the school curriculum.”

“We undertook the Clock project in 2005-2006. The Clock will be erected in 2009.”

How The Winnipeg Foundation Can Assist Better

When asked to mention the kinds of services and resources that The Winnipeg Foundation could provide to better assist them, 7 of the 13 community foundations said they are indeed satisfied with the assistance that The Winnipeg Foundation extends to them so far. Some of these responses are presented below:

“None, they are pretty good”

“They are also doing a commendable job”

“Whatever they would like to give us should be good”

“The Winnipeg Foundation is my resource”

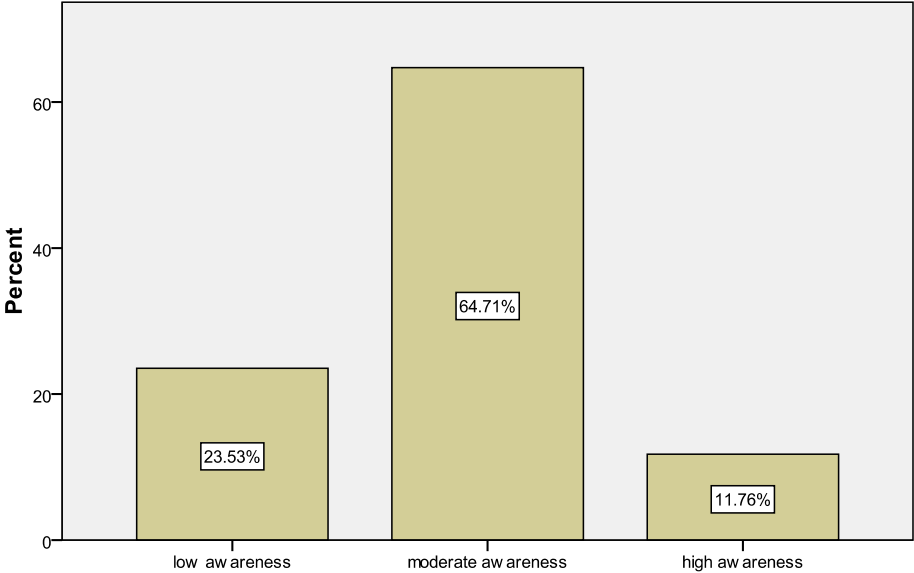
“Pretty good so far. They will come and visit the community which is appreciated!”

However, the remaining 6 community foundations that presented their needs asked for more support in terms of promoting the community foundations, particularly citing their need for promotion materials including website assistance, general media relations, and marketing services, for examples, developing press releases and being equipped with better ideas that could be used to stimulate community interest. Moreover, two of these community foundations also asked for policy improvement and being assisted with professional accounting personnel.

Communities' Awareness of the Community Foundations

The 34 community foundations queried via the surveys were asked to rate the overall awareness of their community foundations within the communities they serve. Notably, as shown in the figure below, 22 of the community foundations chose the 'moderate awareness' option suggested to them in the survey. Of note again, low awareness was chosen by 8 community foundations compared to high awareness that was a cited to be the case in only 4 community foundations.

Figure 6. Community's Overall Awareness of the Community Foundation

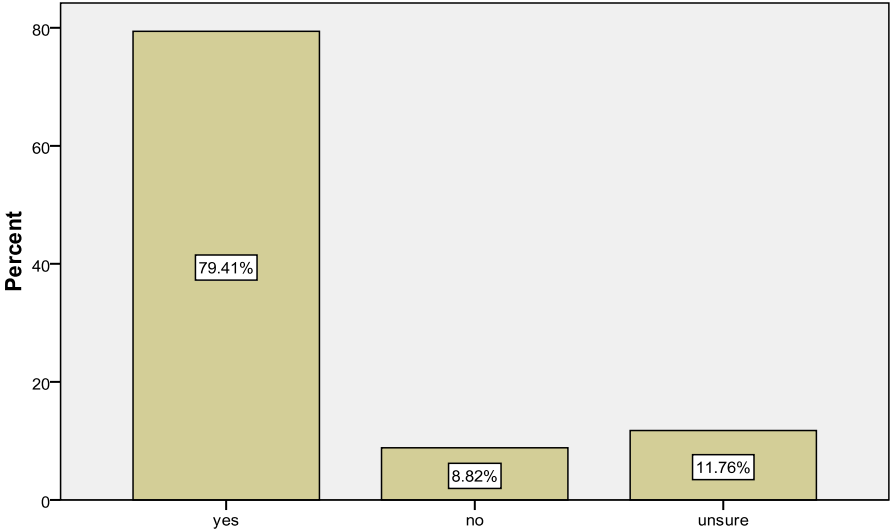


Source: Community Foundation Survey

Relationship to Community Foundations of Canada

Moreover, the community foundations were asked to state whether it is of value to them to be members of the Community Foundations of Canada. As presented in the figure below, a significant number (27) of the community foundations said it is of help to them to be members of the Community Foundations of Canada. In addition, while 3 community foundations said they did not see any assistance from the relationship, 4 of the remaining community foundations implied they were unsure about the benefits of the relationship with Community Foundations of Canada.

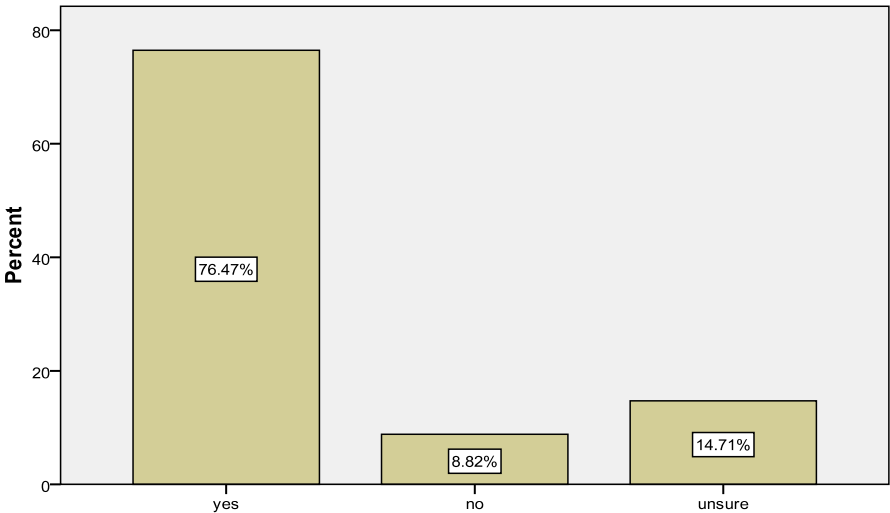
Figure 7. Does Being a Member of Community Foundations of Canada Assist Your Community Foundation?



Source: Community Foundation Survey

Community foundations were asked to state whether they use any services provided by the Community Foundations of Canada. As shown in Figure 8, 26 of the 34 community foundations confirmed that they use the services. However, while 3 of the community foundations said they do not use the services, the remaining 5 were not sure about whether or not they use any services provided by the Community Foundations of Canada.

Figure 8. Use of Community Foundations of Canada Services



Source: Community Foundation Survey

The community foundations were also asked to identify the kinds of services and resources the Community Foundations of Canada could provide to better assist them. Interestingly, while 5 of them expressed their satisfaction with what they are assisted with so far, another 5 community foundations said they were not sure about the kinds of services and resources that the Community foundations of Canada could provide to better assist them. Some of their responses are as presented below:

“They are pretty good”

“We are fine so far”

“We are pleased”

“Not much is needed. CF has the means, knowledge and support”

“Provides us with everything that we need, so we are fine”

“Cannot think of anything”

“Not sure because we don't usually do too much with them compared to The Winnipeg Foundation”

“Not sure. More meetings in Manitoba come to the North?”

However, two community foundations placed the following requests:

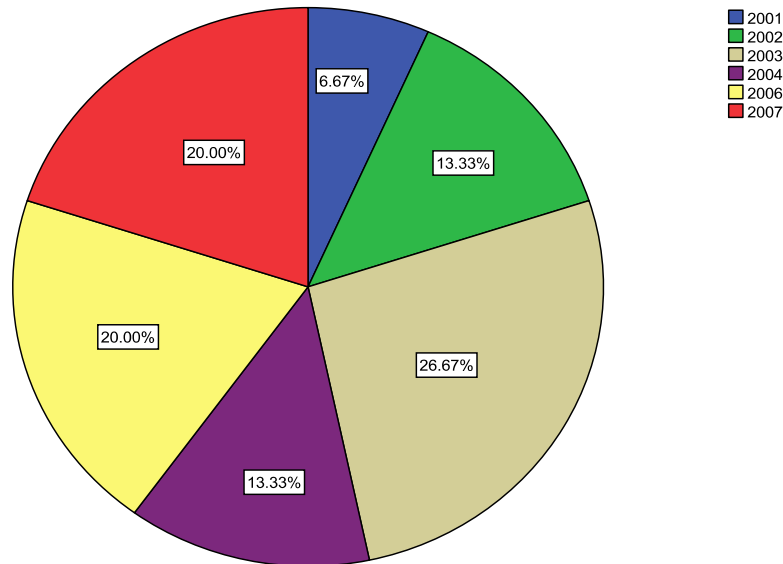
“We need more advertising across the country to promote community foundations as well as a national conference to focus on large foundations”

“We need more info on what works and what does not as well as advice on how to maximize money and making it work for the community”

Youth in Philanthropy

When asked whether they have Youth in Philanthropy groups, 19 (56%) of the 34 community foundations answered ‘no’ whereas the remaining 15 (44%) community foundations answered ‘yes’ to the question. The community foundations were further asked to state the years in which they started their Youth in Philanthropy groups. As presented in the figure below, they first started Youth in Philanthropy groups in 2001, with most registrations to -date having been done in 2003.

Figure 9. Year Youth in Philanthropy Groups Were Established



Source: Community Foundation Survey

The 15 community foundations with Youth in Philanthropy groups indicated the number of youth constituting the groups ranging from the minimum of 2 members to the maximum of 37 members. Also, all the 15 community foundations said that their Youth in Philanthropy groups are involved in grant making, whereby in 2008 each Youth in Philanthropy group made between 2 and 20 grants, with the average number of grants made being 6 per group. Again, these grants averaged \$3,153, with the least and highest values being \$2,000 and \$7,500 respectively.

Financial or In-Kind Supports Provided to the Community Foundations for Operating Costs

While 32 (94%) of the community foundations confirmed that they receive financial or in-kind support for operating costs, the remaining two (6%) said they do not. As shown in the table below, most of the financial support offered to the community foundations to help them with their operation costs comes from The Winnipeg Foundation. No community foundations reported receiving in-kind support from The Winnipeg Foundation. However, during the Community Foundations Workshop on Collaboration in Portage la Prairie, all participating community foundations acknowledged and appreciated the in-kind support that they receive from The Winnipeg Foundation. Examples included ability to call/email The Winnipeg Foundation for assistance and promotion/marketing. Of note too, none of the community foundations said they receive any kind of support from the Government of Canada to help them in this area. Other sources of financial or in-kind support mentioned by the community foundations included local donors, banks, the Thomas Sill Foundation, anonymous donors, and local business people.

Table 14. Financial and In-Kind Supports by Source

Source of Supports	Financial	In-Kind	Both Financial and In-Kind
Local municipality	15%	18%	3%
Government of Manitoba	9%	0%	0%
Government of Canada	0%	0%	0%
Private Foundations	32%	0%	0%
The Winnipeg Foundation	77%	0%	9%
Corporations	9%	6%	3%
Crown Corporations	44%	0%	0%
Other sources	12%	6%	0%

Source: Community Foundation Survey

Grant Making

The rural and northern community foundations were asked to provide the number of grants made over the past 5 years and the values of those grants for each of the years. As seen in Table 15 below, the numbers varied each year however with an increasing trend throughout. Of note as well, even though the average number of grants made by each rural and northern community foundation showed an increasing trend as well, years 2005 through 2007 were dominated by the same average (19). Moreover, foundations received at least 1 grant each year, with the maximum number of grants received characterized by increasing (2005 by 52% and 2008 by 25%) and falling (2006 by -6% and 2007 by -3%).

Again, as highlighted by the average values, the total values of all grants made also varied over the period being characterized by both rising and falling. The largest average value of all grants made over the five-year span was recorded in 2004. In addition, the minimum value of grants made over that period was \$1,200 in 2004 whereas the maximum value was \$210,560 in 2008. However, both minimum and maximum values of grants fluctuated throughout the past 5 years.

Table 15. Number and Value of Grants Distributed by Rural and Northern Community Foundations, 2008-2004

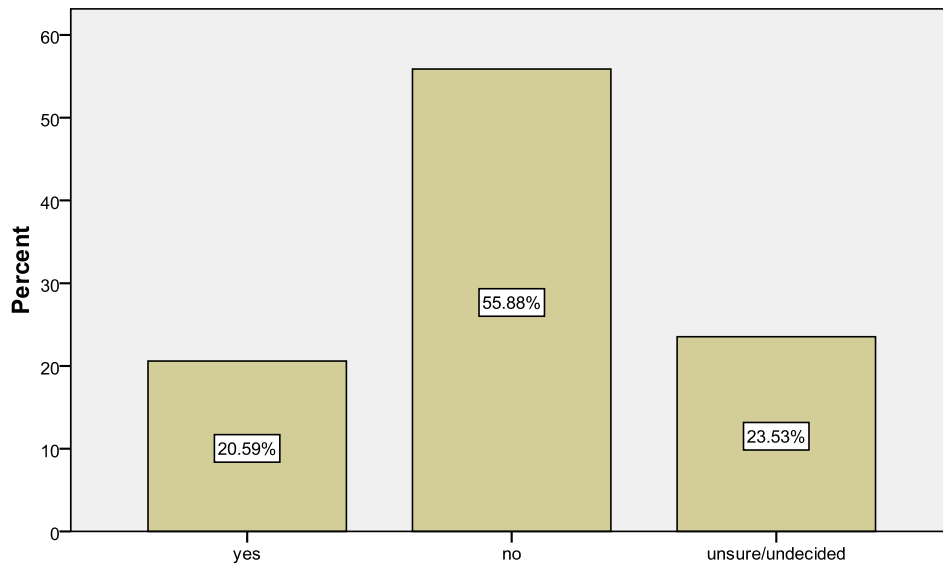
Year	Total Number of Grants Made in Manitoba	Average Number of Grants per Foundation	Range: Number of Grants	Average Value of All Grants per Foundation	Range – Value of All Grants
2008	731	24	1 – 80	\$37,001	\$1,800 - \$210,560
2007	627	19	1 – 64	\$39,831	\$1,400 - \$137,272
2006	595	19	1 - 66	\$33,647	\$1,400 - \$108,225
2005	489	19	1 – 70	\$39,598	\$1,500 - \$131,412
2004	435	17	1 – 46	\$41,486	\$1,200 - \$180,774

Source: Community Foundation Survey (2009)

Again, of the 34 rural and northern community foundations, 24% of them acknowledged to have initiated joint projects in 2008 compared to the remaining 76% that did not. In addition, 13 (38%) foundations said they have granting priorities in particular areas while the remaining 21 (62%) said they do not.

Furthermore, as also seen in Figure 10, 19 (55.9%) rural and northern community foundations said they do not plan to reduce the amount of grants or suspend granting in 2009. Of the remaining 15 foundations, 7 (20.6%) said they do while 8 (23.5%) are unsure/undecided.

Figure 10. Plans to Reduce the Amounts of Grants or Suspend Granting in 2009



Source: Community Foundation Survey

The rural and northern community foundations were also asked to provide priority rating for each of the areas they currently support. The question was structured based on the categories and definitions provided by the Canada Revenue Agency's T3010 form. At a roughly medium level, the rural and northern foundations chiefly extend their support to projects related to the Environment (14 or 41.2%) and Social Services (20 or 58.8%). However, most of the effort goes into supporting areas related to 'Other Community Benefits' that is supported by 30 (88.2%) of the 34 foundations. 'Other Community Benefits' also scored the highest (66.7%) priority ranking followed by Education and Training (62%). The structure of data collected by the Canada Revenue Agency does not allow an understanding of the initiatives conducted in this category.

Table 16. Areas of Activities and Priority Rankings, based on Canada Revenue Agency Categories

	Percent of Foundations Current Supporting	Priority Ranking		
		Low	Medium	High
Social Services <i>Housing, food/clothing banks, senior's services, immigration aid, shelter</i>	58.8%	4.3	56.5	39.1
International Aid and Development <i>Infrastructure development, agricultural programs, medical services, disaster relief</i>	2.9%	90.9	9.1	0
Education and Training <i>Scholarships, bursaries, support of schools/colleges/universities, literacy programs</i>	79.4%	3.4	34.5	62.0
Culture and Arts <i>Museums, galleries, cultural centres, historical/heritage sites, artists</i>	79.4%	3.6	46.4	50
Religion <i>Places of worship, missionary organizations, social outreach, religious colleges/seminaries</i>	11.8%	75.0	25.0	0
Health <i>Hospitals, nursing homes, clinics, mental-health services, addiction services</i>	70.6%	7.2	39.3	53.6
Environment <i>Nature/habitat conservation, preservation of species, recycling, Lake Winnipeg Watershed</i>	41.2%	30	50	20
Other Community Benefits <i>Agricultural societies, parks, recreation facilities, libraries, community halls, summer camps, human rights, ambulance/fire/rescue services, streetscaping</i>	88.2%	3.3	30	66.7

Source: Community Foundation Survey

The rural and northern community foundations were also asked to state whether they have received matching or challenge grants whereby only 33 of them responded. Of these 33 foundations, 23 (68%) answered 'yes' while 10 (29%) answered 'no'. The 23 foundations further indicated the sources of their matching or challenge grants. As seen in Table 17 below, the majority of them (13 or 43.3%) refer to private foundations as their chief source, followed by the Government of Manitoba (10 or 34.5%). Of note, the least cited sources in their order of priority include the Government of Canada as indicated by only 1 and Other Community Foundations (2 or 6.9% of foundations). Other sources cited include Corporations (4 or 13.8%) and Other (6 or 20.7%).

Table 17. Source of Matching or Challenge Grants in 2008

Source	%
Government of Manitoba	34.5%
Government of Canada	3.4%
Corporations	13.8%
Private Foundations	43.3%
Other Community Foundations	6.9%
Other	20.7%

Source: Community Foundation Survey

Achievements and Looking Forward

The community foundations were asked to describe their expected achievements over the next ten years. Below were their responses:

Endowment Building/Growth – The majority of the community foundations would like to increase their funds available for projects, double their current funds, or increase their endowment funds in the range of \$1.5 million and \$6 million by setting off regular and periodical fundraising events or projects. Simply put, the major goal mentioned here is to keep growing financially so they can give more back to their communities.

Leadership in Community Projects - Several community foundations that have never acted as leaders in community projects would like to play the role in the 10 years time.

Awareness - Several tactics are being considered by the community foundations for the purpose of promoting more awareness and inspiring more donations for the betterment of their communities. Some community foundations hope to achieve this by continuing to hand out grants, deciding with the communities on the projects that can be done proactively, reporting to the community on what has been achieved, as well as through websites and other promotional materials. One community foundation in particular stated its intention of “[showing] people that you don't have to die to give money to the foundation [and that] this is a great way to get money into the community.”

Continue to Grant - Furthermore, a number of community foundations intend to continue to support the communities through various initiatives. For example, one of the community foundations intends to exceed its granting to the tune of \$150,000 - \$200,000 annually. The initiative shared by many of them is to be able to provide larger scholarships. In addition, one community foundation specifically looks forward to becoming a major funder of a project to build a new library or museum.

Other Anticipated Achievements - Other goals envisioned include keeping costs as low as possible, establishing policies and practices that raise credibility, and have full time staff members. However, one community foundation would simply like to maintain its current pace.

Optimism for Transfer of Wealth

The 34 community foundations were also asked to describe their optimism towards local transfer of wealth within their respective communities/regions. While only about 3% of them were pessimistic about the issue, about 73% of the community foundations said they were optimistic. Notably too, the remaining community foundations (about 24%) were not sure about whether they are optimistic or not that their community foundations will benefit from the local transfer of wealth in their communities/regions.

Community Foundations' Major Accomplishments

Of note, 31 of the 34 community foundations gave a brief description of their major accomplishments. These included the following:

Increased Profile and Awareness - Despite facing challenges with regard to community awareness, several community foundations were very positive with what they have been able to accomplish so far. Although varied from one community foundation to another, most stated their activities have propelled them to another level as far as their profiles are concerned, particularly with the benefit of raising more awareness about the role of community foundations within their communities.

“Gradual growth is from word of mouth mostly and support of local organizations and activities. We have established brochure, logo, and recognition procedure”

“We hold an annual Foundation awareness week where we hold several fundraising and awareness events in a week in November”

“Hosting a celebration of our donors called ‘Founders Night’ and initiating a ‘Philanthropy of the Year’ award”

“Host annual wine and cheese reception with more than 125 guests attending”

Projects and Initiatives Towards Education - Community foundations take pride in their support of various initiatives geared towards improving the levels of education and assisting the numbers of post-secondary students through scholarship programs. Some of the community foundations participate in the matching scholarship program while others inject funds exceeding \$400,000 into supporting a numerous number of programs in schools as well as in helping to build libraries or generally funding educational institutions. Moreover, community foundations have continuously received donations from the communities and various organizations towards the area of education.

“Establishment and growth of scholarship program has been most rewarding”

“Scholarship building with The Winnipeg Foundation (\$100,000 market value)”

“Helped to purchase a new piano for early years children at the school”

“Have established a number of scholarships as well as a fund for the local independent school”

Endowment Building/Growth - Different community foundations have different goals accompanied with different timelines attached to them with respect to building and growing their endowment funds. However, one thing all community foundations proclaimed to have accomplished is building and growing their endowments. Endowment building and growth has relied on either donations or fundraisers or interests raised from money invested elsewhere, or even through both means for a few of them.

“Started endowment building 2000”

“We have launched two successful campaigns to raise money for the Community Fund. The Community Fund Challenge raised \$300,000 and the Million Dollar Challenge (still ongoing) is trying to increase the Community Fund to \$ million. We have established two annual fundraisers that are sold out each year”

“We have a \$1 million goal that is already 80% complete”

“We received a donation of \$500,000 to go toward our education funds, a medical support fund, Youth in Philanthropy and administration expenses”

“Attracted \$250,000 in funds over the past 10 years with main focus of healthcare”

Funding Health Projects - Another major accomplishment described by the community foundations is their ability to provide financial support to the health sector. The areas of support have included, among others, purchase of an ultrasound unit for hospital; assisting in upgrading the breathing equipment for the fire department; donations of healthcare beds; and purchase of specialized equipment for local hospitals.

Supporting Seniors’ Projects - Some community foundations were proud to mention that they have, in one way or another, played a role in improving the living conditions of the senior citizens in their respective communities. Some of their specific responses included:

“We have supported a senior garden project”

“Looking at our past granting we go from nursery school age right through to seniors drop in centers”

“Seniors are in a better position financially because of the grants from the Foundation”

Supporting Sports and Recreational Activities - Evidently, community foundations know no limit when it comes to serving their communities. Through them, communities have also benefited from various developments and improvements of sports and recreational facilities with the support of their community foundations. This cuts across all kinds of projects and for all ages.

“We have supported all local recreational facilities”

“We are the major donor to the new recreation complex”

“We provided funding the for town waterslide and makeover of children's park”

“We have supported youth through band and sports and facilities that benefit all ages and have tried to help projects geared towards fitness”

Arts and Heritage - Community foundations have played a remarkable role in arts promotion and heritage preservation. Apart from initiating and funding heritage preservation projects, they have also provided room for people to leave their footsteps in the community through bequests.

“Community support for founders club and centennial legacy club”

“Some of our major contributions have been to, among other areas, Festival of the Arts and History Book”

“Because of their commitment to our Foundation, other organizations concerned with diminishing enrolments and aging members are looking to the Foundation for ways to preserve their heritage”

“Grants cover a wide variety of groups and organizations, including heritage”

“Helped finance the improvements of the local museum”

Environment - Community foundations proudly acknowledge their role in initiating and facilitating projects geared towards environmental conservation for the welfare of their communities. Below are some of the examples provided:

“...McConnell Environmental Initiative”

“[working with the] Oak Lake Water & Fish Enhancement Association”

Establishing and Supporting Youth in Philanthropy Programs - At various times, some of the community foundations started Youth in Philanthropy programs to pass on the experience and spirit to the youth and also encourage them to contribute to the communities in which they live. However, starting Youth in Philanthropy programs was not everything these community foundations considered but also supporting and sustaining them was a goal. Today, the community foundations of Manitoba are indeed proud of their achievement in this area.

“Support of school for youth in philanthropy program”

“Helping build a Youth in Philanthropy in a school of 230 students”

“2006 started the Youth in Philanthropy program which is known as Teen Leadership Council”

“Well-established Youth in Philanthropy Program”

“Supporting our Youth in Philanthropy Council going into our 8th year”

Success with Internal Operations - Hiring of a staff member has also been a frequently cited accomplishment by some of the community foundations. This relieves the board members so their time can be used to concentrate on endowment building instead of performing operational tasks. However, some community foundations are happy with the pace at which their board members run the foundation’s activities. Some are also happy for having been able to implement their strategic plans, have policy manual and operating guidelines, and even secure office space.

Other Accomplishments - Other accomplishments described by the community foundations ranged from simply getting started to assisting in building a terminal structure at the airport. Moreover, community foundations have also played a key role in supporting other organizations and programs for the welfare of the communities.

“Getting started and established was a big effort in a small rural area”

“We have given out over \$990,000 in grants to over 100 organizations in our granting area in 12 years of granting”

“Some of our major contributions have been to the Agricultural Society”

“In the last three years we have gained the trust of two community clubs and one community”

“Generous amount has been pledged over a number of years toward housing for the disadvantaged”

“Starting a fund to help organizations dealing with poverty--"Tackling Poverty Together" Fund”

“We have donated funds to many organizations in order for them to complete projects of their own. We are happy to be community supporters”

“Assist in building a terminal building at airport”

“Purchased 2 new fire trucks”

Tools, Resources, or Actions needed to become More Effective

The 34 community foundations were also asked to identify specific tools, resources, or actions that would make them more effective. Twenty-five community foundations responded, and the tools, resources, or actions described include:

Advanced Technology - A number of community foundations expressed their need for using advanced technology in the forms of both hardware and software in their day-to-day operations. Their particular concerns were on the management of financial/accounting records, including maintaining an accurate and easily retrievable list of donors and donations as well as that of investments over time. They generally expressed the need to engage effective technology in their management of tasks that is both affordable and time saving.

“Donor management software”

“Better accounting system to track investment”

“Accounting programs all community foundations can use and that give more time”

“A financial computer program which is affordable to us smaller foundations”

“Establish a computerized accounting system which will generate receipts and an up-dated donor/grant tracking system”

“Accounting software and hardware”

Awareness and Promotion - The general call here ranged from the need for financial and publication resources to simply ideas and plans for better marketing strategies of the community foundations. Apart from the desire to identify themselves more with the communities they serve, the community foundations’ clear need was to bridge the gap between them and the communities they serve in terms of increasing their awareness and promoting their role within the communities. Some are further ahead in terms of methodologies and resources to publicize their existence compared to others, but still the need for more awareness was a commonly expressed need.

“Having our own website”

“Establishing a more user-friendly website”

“More financial resources for activities such as promotion and advertising”

“Publications that the general public would notice”

“Financial assistance to increase our promotions budget would be very beneficial to the Foundation. Having monthly paid advertisements would increase public awareness”

Community Collaboration and Support – Community foundations expressed their enthusiasm to attract more community members to work with them, to engage youth and increase membership sizes.

Organizational Improvements - Two main issues emerged as paramount to improving the performance of the community foundations. These include getting assistance with administrative funds to hire staff members and getting better ideas for fundraising and endowment building.

“Would have to alter our philosophy with regard to more actively soliciting”

“Government grant to hire individual on short term basis to pursue fundraising”

“Creative ways to build our capital”

“A professional marketer who would work without remuneration”

“More fundraising ideas”

Hopes for the Future in the Communities/Regions and Community Foundations’ Role

Community foundations were also asked to state their hopes for the future of their communities/regions and rate themselves in terms of the importance of their roles in achieving that future. Of the 34, only 28 community foundations responded to this question as follows:

Sustained Impact and Growth - There is a feeling that the community foundations are part and parcel of a brighter future. However, despite being optimistic and enthusiastic about continuing to support their communities, community foundations also realize that they cannot perform this task alone. They see the communities also playing their role in making this possible by providing both their financial, material and time resources. In short, they position themselves as mere representatives of the majority.

Moreover, their commitment to service and brighter future draws along with it a common optimism for a flourishing and growing community, even in the face of such hurdles as the recent poor global economic conditions and local competition wherever and whenever it exists.

“Maintain and obtain new businesses; more affordable housing; attract new doctors, nurses, etc.; the foundation hopes to make the community a better place to live. Our grants are given to help organizations with their projects. We are a local source of funding that many groups have come to rely on”

“We hope to maintain and build on the community foundation principles. Over the past 15 years we have gradually earned the trust and respect of our communities. They like the idea that we are a charity for charities and that we are nonpartisan. Donors love the idea that their money is benefitting their community for years to come and they can trust that their dollars will never be spent and only the income is used for the betterment of their community and its citizens. Our registered charities appreciate that they have equal opportunity to receive funding from the Foundation for their projects. It will be important to continue supporting a wide range of projects that enhance quality of life experiences in our communities”

“Our population has remained at 1,600 over the past number of years. The number of farm families has decreased in the face of larger farms - this change has naturally made farm individuals pay more tax. These people are now adverse to tax increases - it will be necessary for our community to have extra dollars to spend on infrastructure (arenas, paint, education), that will not be available from our municipal tax. As our population is not declining significantly, investment in our community is valuable”

Community Involvement and Awareness - The community foundations refrain from being seen as heroes and commit themselves to letting the communities play the leading role with them merely supporting. To achieve this there is a common focus on forming the spirit of ‘oneness’ in the communities where everyone comes together and plays their part. Moreover, there seems to be a common focus on attracting and integrating the youth who, as it appears, are highly valued.

“Hopeful the community & foundation grow into a mutually trusting relationship”

“Promotion of community spirit”

“Help to make our city and surrounding area a place where most residents feel that they have contributed to building the community of their dreams”

“That everyone will work as one community to achieve sustainability”

“Youth is our most important resource”

“Involve young people”

Better Quality of Life and Community Retention - Community foundations are sensitive of depopulation trends in their communities and feel that they have a role to play to rectify the situation. They realize that poor quality of life is one of the factors for people to forsake their communities, and that they can do something to improve it. As such, they commit themselves to working hard to improve the quality of life to help retain their communities.

“Stop decline in population”

“We hope that our foundation will continue to be an essential part of our community helping to fund projects that provide a better quality of life for our residents”

“Our foundation can help support local growth by continuing to help fund local projects and services, thus drawing people to our community”

Community Engagement

Communication Methods used to Inform Communities/Regions of Community Foundations' Activities

Rural and northern community foundations were asked to indicate the communication methods they use to inform their communities about the activities they undertake and state who pays for the use of such methods. As shown in Table 18 below, 20 community foundations make use of a website to communicate their activities to the communities. Ascertaining who financially contributes to community foundation websites is difficult due to multiple answers received on the survey. From the information received, it is clear the majority of websites are financed through two main methods: solely by the community foundation or a combination of community foundation and donated services and/or funds.

Furthermore, the next popularly used means of communication is paid newspaper advertisements and it is used by about 88% of the community foundations who also bear the greatest chunk (roughly 83%) of its related expenses. Only one community foundation covers such expenses through donations while 4 (approximately 13%) community foundations pay for the expenses themselves in conjunction with the support from donors.

Brochures (around 76%), annual reports (about 74%), and community roots magazine (close to 71%) are also popularly used methods of communication. Brochures and annual reports are largely managed by the funds availed by the community foundations themselves. Of note though, even though the Community Roots magazine is simply donated to the community foundations (roughly 96%), 10 (about 29%) community foundations said they do not use it to inform their communities about their activities.

Specifically about the community roots magazine, the community foundations that use it generally recommend that it should capture more news on the events of the community foundations that do more than just what is reported, and that it should carry more stories about how other community foundations are raising funds. Other recommendations included improvements of its circulation in order for it to reach more people and places (right destinations), it should be equipped with more pictures from the community foundations, and more copies should be circulated to the community foundations.

Twenty community foundations (59%) make use of websites to communicate their activities to the communities. In terms of payment for expenses related to website, 50% of the community foundations indicated they share the expense between themselves and donors, 32% cover the costs themselves, and 15% cover costs through donors.

Community foundations also inform their communities about their activities through community meetings (about 56%), newsletters (about 32%), and radio (about 21%). While the first two methods are largely paid for by the community foundations themselves (i.e. approximately 68% and 82% respectively), expenses related to the use of radio are highly and equally covered by donors on one hand and both donors and the community foundations on the other hand (that is, both rated at roughly 43%).

Additionally, only 9 (about 26%) of the 34 community foundations said they use different other methods to inform the communities of their activities. Of these 9 community foundations, 5 participate in Will

Week, one participates in Celebration Gala, and the remaining 3 did not specify their methods. Lastly, about 44% of the community foundations generally bear the expenses associated with using the ‘other’ methods, followed by a combination of both themselves and donors (about 33%), and finally entirely donors (approximately 22%).

As shown in Table 18 below, 20 community foundations make use of a website to communicate their activities to the communities. Ascertaining who financial contributes to community foundation websites is difficult due to multiple answers received on the survey. From the information received, it is clear the majority of websites are financed through two main methods: solely by the community foundation or a combination of community foundation and donated services and/or funds

Table 18. Methods of Communication Used and the Payer of Related Costs for the Use of the Methods

Method of Communication	Number of CF Reporting	Paid by Community Foundation	Donated to Community Foundation	Combination of Paid and Donated
Website(s)	20*	11	5	17
Paid Newspaper Advertisements	30	25	1	4
Brochure(s)	26	17	6	3
Annual Report(s)	25	13	6	6
Community Roots Magazine	24	1	23	0
Community Meeting(s)	19	13	4	2
Newsletters (print or electronic)	11	9	1	1
Radio	7	1	3	3
Other (Will Week, Community Foundation Week)**	9	4	2	3

Source: Community Foundation Survey

* In some instances community foundations indicated more than one response to this questions, hence the three columns do not add up to 20.

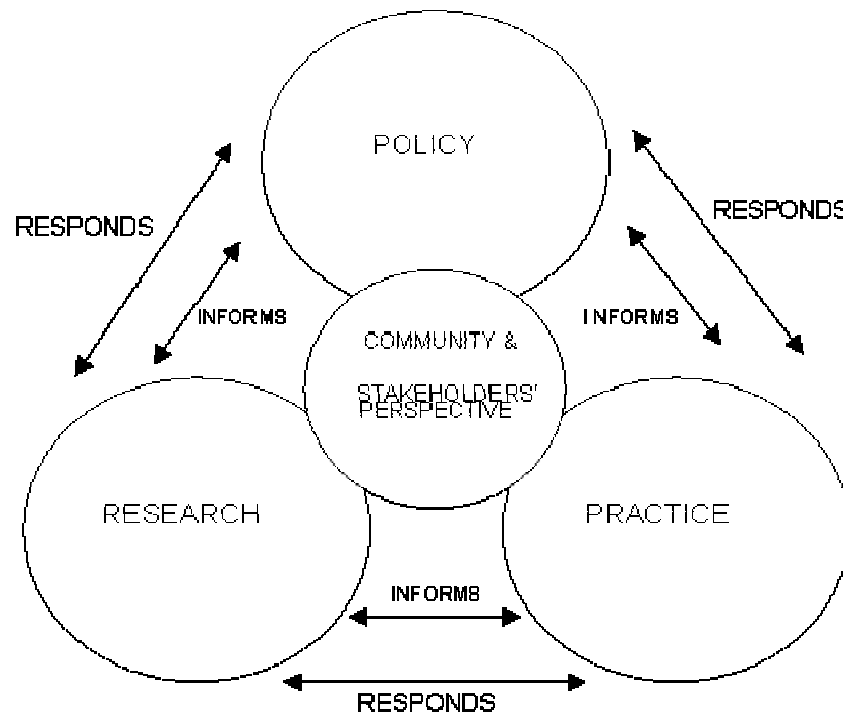
** 5 foundations participated in Will Week and 1 foundation participated in a celebration gala. The remaining 3 foundations did not specify their activity.

MOVING FORWARD

Rural and northern community foundations in Manitoba should be described as diverse, dynamic, and dedicated. Each community foundation is diverse, with different locally established priorities, governance structures, and endowments. Community foundations are dynamic and eclectic in the areas they support, such as senior's services, health provisions, education/scholarships, and environmental projects. The dynamic nature has allowed community foundations to initiate special and joint initiatives to meet local needs. Regardless of local priorities or current activities each community foundation illustrated dedication to their communities. Foundations strive to increase the quality of life for community residents, encourage new behaviours, and create lively communities.

Community foundations need to read and review the findings generated through the project. Due to the diversity among rural and northern community foundations the interpretation of questions may vary. Variance in interpretation is healthy and constructive for moving the community foundations movement forward in Manitoba. Each community foundation is encouraged to suggest implications from the findings in the areas of community development/practice, policy, and academia/research (see Figure 11).

Figure 11. Interface of Community Development/Practice, Policy, and Research



Based on the findings generated from the project, a series of initial questions for further consideration are posed. Questions are posed from the perspective of each area: community development/practice, policy, and academia. The following list is by no means exhaustive; rather, the list should be viewed as organic and continually changing.

Community Development/Practice

- How can the profile of community foundations in rural and northern communities be raised?
- As formal and informal collaborations are occurring among community foundations in Manitoba, how can collaborating be encouraged across Manitoba?
- What resources, or mechanisms, need to be created to assist the community foundation boards with effective management of staff and volunteers? If resources are already available, how can they be accessed and used more frequently?

Policy

- How can community foundations ensure awareness among provincial and federal government departments operating in rural and northern communities?
- How do government departments/agencies support community foundations, particularly addressing challenges and opportunities?
- Given community foundations are making in excess of \$1.2 million annual contributions to rural and northern communities, what are the opportunities for government policy and/or programs to assist community foundations in continuing to contribute to the vitality and sustainability of their communities/regions?

Research

- What is the transfer of wealth amount in rural and northern communities in Manitoba? How do we create a Canadian formula for estimating wealth transfer potentials? When is the key timeframe for focusing on wealth transfer?
- How can university research centres, and faculty, assist community foundations and government to strengthen the community foundation movement?
- How sustainable is the community foundation movement in rural and northern Manitoba communities?

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Appendix A: Types of Foundations in Manitoba

Within Manitoba there are 529 registered foundations (CRA, 2008). This total includes community foundations, private foundations, special interest foundations, and service club foundations. According to Canada Revenue Agency there are two categories of foundations: (i) private foundations and (ii) public foundations. Within the public foundations category there are three sub-categories: (a) community foundations, (b) special interest public foundations, and (c) service club public foundations (can be referred to as or operate as service club community foundations). There are no sub-categories of private foundations.

The main distinguishing features between the categories of private foundation and public foundation are the source(s) of its capital and the composition of the governing board. Private foundations get more than half of their capital from one source and often have family or other non-arm's length board members. A private foundation is not allowed to engage in any business activity. Public foundations, on the other hand, get capital from more than one source and have an arm's length board. Within the category of public foundation, there are three sub-types:

- Community Foundations are public foundations focusing on building community endowments and supporting a wide range of charitable activities in specific geographical communities.
- Special Interest Foundations are focus on particular purposes, such as the environment or women's issues. These foundations, like community foundations, accept gifts and manage donor-designated funds.
- Service Clubs Foundations typically focus on one or two initiatives that are directly related to the service club or its initiatives.

The primary distinction between a community foundation and a service club/special interest foundation is the mandate and scope. A community foundation has a broad scope including all issues related to the community. The mandate of service club and special interest foundations is usually focused on one or two initiatives and need not to be unique to a single community. In some instances, a service club foundation can have a broad mandate and support many different initiatives, which can make the distinction more difficult.

Appendix B: Rural Development Institute, Brandon University Overview

For more than 100 years Brandon University has been a cornerstone of the City of Brandon and southwestern Manitoba. Throughout this time, Brandon University has maintained its foundation as a rurally based university with strong national and international links. The University established the Rural Development Institute in 1989 as an academic research center and a leading source of information on issues affecting rural communities in Western Canada and elsewhere.

RDI functions as a not-for-profit research and development organization designed to promote, facilitate, coordinate, initiate and conduct multi-disciplinary academic and applied research on rural issues. The Institute provides an interface between academic research efforts and the community by acting as a conduit of rural research information and by facilitating community involvement in rural development. RDI projects are characterized by cooperative and collaborative efforts of multi-stakeholders.

The Institute has diverse research affiliations and alliances and multiple community and government linkages related to its rural development mandate. As evidenced in the CCP Manitoba/Nunavut Project, CIMnet was integral to the project in the delivery of project activities and will have a role in the *Community Collaboration Project (CCP): Empowering Communities and Building Capacity* project.

RDI disseminates information to a variety of constituents and stakeholders and makes research information and results widely available to the public either in printed form or by means of public lectures, seminars, workshops and conferences.

For more information on the Rural Development Institute visit: www.brandonu.ca/rdi



Appendix C: Survey Instrument

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

under 18 years of age

Young

19-35 years of age

Adult

Adults

35-64 years of age

Seniors

65 years of age or older

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.

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 Awareness	2. <input type="checkbox"/> Low Awareness	3. <input type="checkbox"/> Moderate Awareness	4. <input type="checkbox"/> High Awareness
---	--	---	---

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

- 1. Yes
- 2. No
- 3. 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/ 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?

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 (Check if supported)	Priority Ranking				
		Very Low	Low	Medium	High	Very High
Social Services <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"/>
International Aid and Development <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"/>
Education and Training <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"/>
Culture and Arts <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"/>
Religion <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"/>
Health <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"/>
Environment <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"/>
Other Community Benefits <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?

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

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?

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. For further information on the project please visit: www.brandonu.ca/rdi/comfdn.asp.

Appendix D: Interview Guide

Community Foundations Interview Guide

1. Date of Interview

2. Time of Interview

3. Name of Respondent

4. Telephone Number of Respondent

5. Name of Community Foundation

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

Introduction

Thank you for taking the time to participate in this survey. My name is _____ (interviewer's name) and I am working with the Rural Development Institute, Brandon University. The interview will take approximately 30-45 minutes to complete.

You are being asked to participate in an interview as part of the 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 goal of the project is to increase the understanding of the diversity that exists among Manitoba's 40 community foundations. The project will achieve an increased understanding of community foundations, their 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 policy and programming, and academic institutions concerned with community development.

Your participation is entirely voluntary and there will be no negative consequences if you refuse to participate in it, withdraw from it, or refuse to answer certain questions. Your participation/identity in this survey will be confidential. All comments and answers that you provide will not be attributed to your identity and comments will be generalized to prevent identification.

Review/Clarify Survey Responses

See *highlighted survey*.

* Please list communities and municipalities served.

7. What was the catalyst for the creation/establishment of your community foundation?

Challenges and Opportunities

8. Based on your community foundation, what are the opportunities and challenges related to human resources? (*Paid staff, volunteers, etc*)

9. Based on your community foundation's experiences, what are the opportunities and challenges related to financial resources?

10. Based on your community foundation's experiences, what are the opportunities and challenges related to structural or organizational resources?

Resources, Staff, and Support

11. What resources (human, financial, organizational, or policy) could be provided to assist your community foundation reach its goals and priorities? For example, would software or training sessions be helpful to your community foundation?

12. Does your community foundation have paid staff members?

1. Yes

If yes, please list the number of paid staff members and their positions.

2. No

13. Describe your community foundation's financial and in-kind support received. Please clarify if funding is regular versus one-time.

Community Foundation Relationships

14. Does your community foundation have a formal or informal relationship with any other community foundation(s)?

1. Yes

If yes, please list the community foundations you have a relationship with and describe relationship.

2. No

3. Unsure

15. Does your community foundation recognize the benefits of sharing resources or collaborating with other community foundations?

. Yes

If yes, please list the benefits.

2. No

3. Unsure

16. Does your community foundation recognize the risks with sharing resources or collaborating with other community foundations?

. Yes

If yes, please list the risks.

- 2. No
- 3. Unsure

17. Does your community foundation have informal or formal relationships with other groups, municipalities, or associations?

- 1. Yes

If yes, please list the groups, municipalities, or associations your community foundation has a relationship with.

- 2. No
- 3. Unsure

Special Initiatives

18. Has your community foundation acted as a leader in community projects? Please describe.

19. In 10 years, what goals would you like to see your community foundation achieve?

Internet Connectivity

20. Does your community foundation have access to high speed Internet?

1. Yes
2. No
3. Unsure

21. Please clarify the type of high-speed Internet that is used.

1. Cable
2. Broadband
3. T1
4. DSL (digital subscriber loop)
5. Satellite
6. Wireless
7. Unsure

22. Do all community foundation board members have access to high speed Internet?

1. Yes
2. No

What percentages of community foundation board members have access to high speed Internet?

_____ %

How do you communicate with non-high speed connected board members?

3. Unsure

23. Do all communities/municipalities served by the community foundation have access to high speed Internet?

- 1. Yes
- 2. No

Approximately what percentage of communities have access to high speed Internet?

_____ %

- 3. Unsure

24. Is high-speed Internet available at your local library or at another central location? Please specify _____

- 1. Yes
- 2. No
- 3. Unsure

25. Does your community foundation currently have a maintained Internet website?

- 1. Yes
- 2. No
- 3. Unsure

26. Does your community foundation have access to trained people in your community to help maintain your website?

- 1. Yes
- 2. No
- 3. Unsure

Questions Raised at CFC Regional Meeting

These questions were raised during discussions at the CFC Regional Meeting.

27. Does your community foundation utilize the Community Roots publication that is published every year by The Winnipeg Foundation?

- 1. Yes
- 2. No
- 3. Unsure

Do you have suggestions or comments to improve the publication?

28. What kinds of services and resources could The Winnipeg Foundation provide to better assist community foundations?

29. What kinds of services and resources could Community Foundations of Canada provide to better assist community foundations?

30. We request a copy of your grants listing for the years 2004-2007. Would your community foundation be able to provide a copy by fax, mail, or email?

- 1. Yes
- 2. No
- 3. Unsure

Appendix E: Communities & Municipalities Served by Community Foundations

The following is a list of communities and municipalities served by a local community foundation based on information provided in the survey.

COMMUNITY FOUNDATION	COMMUNITIES SERVED
Northern Neighbours Foundation, Inc.	<ol style="list-style-type: none">1. Cranberry Portage2. Creighton3. Denare Beach4. Flin Flon5. Sherridon6. Snow Lake
Beautiful Plains Community Foundation Inc.	<ol style="list-style-type: none">1. Lansdowne, Municipality of2. Langford, Municipality of3. Rosedale, RM of4. Glenella, RM of5. Brookdale, Town of6. Neepawa, Town of7. Eden8. Arden9. Franklin10. Birnie11. Riding Mountain12. Kelwood13. Mountain Road14. Glenella
Carberry and Area Community Foundation, Inc.	<ol style="list-style-type: none">1. Carberry, Town of2. North Cypress, RM of3. Wellwood4. Brookdale
Carman Area Foundation Inc.	<ol style="list-style-type: none">1. Roland, RM of2. Dufferin, RM of3. Grey, RM of4. Carman, town of5. Sperling, Community of
Selkirk & District Community Foundation Inc.	<ol style="list-style-type: none">1. Selkirk, City of2. St. Andrews, RM Of3. Beaconia

4. Clandeboye
5. East Selkirk
6. Libau
7. Lockport
8. Matlock
9. Netley
10. Petersfield
11. Ponemah
12. Whitewold

Westshore Community Foundation Inc.

1. Riverton
2. Gimli, RM of
3. Fraserwood
4. Winnipeg Beach
5. Dunnottar

The Virden Area Foundation Inc.

1. Virden
2. Wallace, RM of
3. Pipestone, RM of
4. Reston
5. Elkhorn
6. Miniota
7. Woodnorth
8. Hargrave
9. Lenore
10. Kola
11. Sinclair
12. Oak Lake
13. Pipestone
14. Cromer

The Winkler Community Foundation Inc.

1. Krongart
2. Greenfarm
3. Hamburg
4. Reinfeld
5. Schanzenfeld
6. Chortitz
7. Friedensruh
8. Blumengart
9. Glencross
10. Osterwick
11. Hochfeld

12. Neuenburg
13. Gnadenthal
14. Friedensfeld
15. Blumenfeld
16. Reinland
17. Schoenwiese
18. Haskett
19. Rosengart

The Cartwright and Area Foundation Inc.	<ol style="list-style-type: none"> 1. Cartwright, Village of 2. Roblin, RM of 3. Mather. LUD of
Dauphin & District Community Foundation Inc.	<ol style="list-style-type: none"> 1. Dauphin, City of 2. Dauphin, RM of 3. Sifton 4. Valley River 5. Ochre River 6. Ethelbert District 7. Gilbert Plains
Plum Coulee Community Foundation Inc.	<ol style="list-style-type: none"> 1. Plum Coulee
Community Foundation of Swan Valley Inc.	<ol style="list-style-type: none"> 2. Swan River, Town of 3. Swan River, RM of 4. Minitonas, Town of 5. Minitonas, RM of 6. Mountain, RM of 7. Benito, Village of 8. Bowsman, Village of
Souris Glenwood Foundation Inc.	<ol style="list-style-type: none"> 1. Souris, Town of 2. Glenwood Municipality
The Reston and Area Foundation Inc.	<ol style="list-style-type: none"> 1. Reston 2. Pipestone 3. Sinclair 4. Cromer 5. Scarth 6. Woodnorth 7. Tilston 8. Broomhill

9. Bede
10. Belleview

The Glenboro Area Foundation Inc.	<ol style="list-style-type: none"> 1. Glenboro 2. South Cypress, RM of 3. Argyle, RM of (in part)
Big Grass Community Foundation Inc.	<ol style="list-style-type: none"> 1. Westbourne, RM of 2. Lakeview, RM of 3. Gladstone 4. Plumas 5. Wesbourne 6. Langruth
The Killarney Foundation Inc.	<ol style="list-style-type: none"> 1. Turtle Mountain 2. Agryle (Baldur) 3. Clanwilliam (Erickson) 4. Harrison (Sandy Lake)
North Norfolk-MacGregor Foundation Inc.	<ol style="list-style-type: none"> 1. North Norfolk, RM of 2. Hamlet of Lavenham 3. Town of MacGregor
Oak Lake & Area Foundation Inc.	<ol style="list-style-type: none"> 1. Oak Lake, Town of 2. Sifton, RM of 3. Woodsworth, RM of
The Interlake Community Foundation Inc.	<ol style="list-style-type: none"> 1. Rockwood, RM of 2. Rosser, RM of 3. Woodlands, RM of 4. Stonewall, Town of 5. Teulon, Town of
Tiger Hills Community Foundation	<ol style="list-style-type: none"> 1. Treherne, Town of 2. South Norfolk, RM of
Grandview and District Community Foundation	<ol style="list-style-type: none"> 1. Grandview, Town of 2. Grandview, RM of
Living Legacy Community Foundation	<ol style="list-style-type: none"> 1. RM of Russell 2. RM of Shellmouth-Boulton 3. RM of Silver Creek

	<ol style="list-style-type: none"> 4. Town of Russell 5. Village of Binscarth
Pilot Mound and District Community Foundation	<ol style="list-style-type: none"> 1. Pilot Mound 2. RM of Louise
Brandon Area Community Foundation	<ul style="list-style-type: none"> ▪ Specific names were not provided.
Wawanesa Foundation	<ol style="list-style-type: none"> 1. Wawanesa 2. Nesbitt 3. Treesbank 4. Hilton 5. Oakland 6. South Cypress
Morden Area Foundation	<ol style="list-style-type: none"> 1. Morden 2. RM of Stanley
Brokenhead River Community Foundation	<ol style="list-style-type: none"> 1. RM of Brokenhead 2. RM of St. Clements (in part) 3. RM of Lac Du Bonnet (in part) 4. RM of Alexander (in part) 5. Town of Beausejour 6. LUD of Tyndall 7. Village of Garson
Thompson Community Foundation	<ol style="list-style-type: none"> 1. Thompson
The Boissevain & Morton Foundation Inc.	<ol style="list-style-type: none"> 1. Town of Boissevain 2. RM of Morton
Community Foundation of Portage and District Inc.	<ol style="list-style-type: none"> 1. Portage la Prairie, City of 2. Southport 3. Newton 4. Oakville 5. Poplar point 6. St. Ambroise 7. High Bluff 8. Delta 9. MacDonald 10. Firs

The Steinbach Community Foundation

1. Steinbach and surrounding areas

Minnedosa & District Foundation Inc.

1. Town of Minnedosa
2. Town of Basswood
3. Town of Clanwilliam
4. RM of Minto
5. RM of Odanah

Roblin District Community Foundation Inc.

1. Town of Roblin
2. RM of Shell River
3. RM of Hillsburg
4. RM of Shellmouth-Boulton

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The role of the RDI Advisory Committee is to provide general advice and direction to the Institute on matters of rural concern. On a semi-annual basis the Committee meets to share information about issues of mutual interest in rural Manitoba and foster linkages with the constituencies they represent.