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# Strategic Dialogue

May 11, 2010 - Toronto

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VP, Community Foundations of Canada

# *Community Investing*



Challenge for community foundations – to think about how we use all our assets to address complex social issues

Understanding that our assets are not just financial but include:

- Our broad and extensive networks
- Our knowledge of local community
- Our influence in local community
- Our influence with national partners

*Community Foundations*



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...have the opportunity to change the conversation from short-term grantmaking to poor parts of a community to long-term investment strategies that strengthen business, home ownership, education, and wealth creation opportunities for the betterment of all.

from Equity Advancing Equity

# *CFC Resources on Responsible Investment*



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- [www.responsible-investment.ca](http://www.responsible-investment.ca)
- Legal/Regulatory primer on community/mission investing with PFC
- Profiles of community/mission investing by nine foundations in Canada
- Questions for fund managers
- Sample RI policy for community foundations based on Ottawa's work

*Responsible  
Investing  
Going Forward...*



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- Board road show with PFC, including how-to-get-started resource
- National responsible investing training program
- How-to guide on community investing
- Community investing training workshop for finance and program staff
- Lake Winnipeg Watershed investor forum
- Work with others to build the social finance “movement”

# *From Good Causes to Root Causes*



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A Toolkit on Poverty that will help community foundations with:

- [Understanding Your Context](#)
- [Ways to Respond to Poverty](#)
- [Assessing Your Readiness for a Stronger Anti-Poverty Role](#)
- [Choosing a Strategy](#)
- [Anticipating Your Impact](#)
- [Assessing Your Impact](#)
- [Five Difficult Questions](#)

*Edmonton Community  
Foundation  
Social Enterprise Fund*



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## **Mission: Strengthening Entrepreneurship in the Social Sector**

- provides non-profit organizations with flexible financing, business expertise and more
- help non-profit organizations in the Edmonton area whose core business is improving the social environment
- main offerings are: loans, seminars, direct engagement, and path to loan grants
- look for ideas with blended value, where social returns are balanced with fiscal sustainability

*Edmonton Community  
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## **Partners in the Social Enterprise Fund**

- Edmonton Community Foundation
- City of Edmonton
- United Way of Alberta Capital Region

# *The Winnipeg Foundation*



Centennial Neighbourhood Project 2003-2008

*“Education is the ticket out of poverty”*

## **Strategy:**

- Recognizing social and economic conditions impact a student’s academic success
- Enhancing program and outreach
- Building on existing neighbourhood strengths
- Engaging a wide range of partners

## **5 Year Investment:**

- \$2.9 million allocated

# *The Winnipeg Foundation*



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## Centennial Neighbourhood Project 2003-2008

### **Impact:**

- Education
- Community Engagement
- Safety
- Housing
- Partnerships

# *Fundy Community Foundation*



## Living on Low Income in Charlotte County – Moving Forward

- Hosted a community dialogue on poverty
- Follow-up meeting “Moving Forward” to implement ideas generated
- Continue to convene meetings to find ways to reduce poverty in Charlotte County
- Working with all the CFs in New Brunswick in collaboration with the multi-sectoral Provincial strategy on poverty

# *What Next?*



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## Dialogue among Community Foundations:

- How do we use all our assets?
- Community/Responsible Investing
- Examining Finance Models used by US CFs
- Revisiting our Business Model
- Strengthening our Intermediary Role
- Achieving Greater Impact
- Working with Aboriginal Communities