

STRATEGIC PLAN

2018 > 2021

Plan adopted by the Board of Directors



Foundation of Greater Montréal

FOUNDATION OF GREATER MONTRÉAL

MISSION

The Foundation of Greater Montréal (FGM) helps individuals, families and organizations getting involved to support their community by creating funds for selected causes in all sectors. The FGM manages the funds' assets and guides donors by identifying key issues and supporting the community's most dynamic actors. It also encourages philanthropy as a major driver for well-being in Greater Montréal.

VISION

The FGM is recognized for its strategic and unifying leadership in achieving Sustainable Development Goals⁽¹⁾ via its support for dynamic projects by community organizations and via its focus on innovative initiatives, including for children's well-being in the community.

⁽¹⁾ As defined by the United Nations.

VALUES

Integrity, excellence, inclusion, listening, innovation.



Foundation of Greater Montréal

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ISSUE 1 Financial Capital Development

STRATEGIC GOAL 1 Boost Fund Creation and Donations

FOCUS AREA 1 PHILANTHROPY PROMOTION

Objective 1.1 Promote philanthropy and the FGM as a core value and an important tool in our community.

Objective 1.2 Develop efforts to promote government programs aimed at creating funds in various areas (culture, sports, education, health, etc.).

Objective 1.3 Distribute philanthropy information tools and ensure they are available for events and relevant projects.

FOCUS AREA 2 FINANCIAL CAPITAL GROWTH

Objective 2.1 Increase the number of funds, in particular those devoted to sustainable development.

Objective 2.2 Boost the performance of government partnerships aimed at creating funds.

FOCUS AREA 3 NETWORKS OF COLLABORATORS AND TERRITORIAL DEPLOYMENT

Objective 3.1 Increase collaboration with networks of professional advisors.

Objective 3.2 Structure networks of collaborators by engaging fund creators.

Objective 3.3 Establish a network of active local collaborators on the Island of Montréal, the North Shore and the South Shore.

FOCUS AREA 4 RECOGNITION

Objective 4.1 Spotlight the contributions of donors and fund creators.

FOCUS AREA 5 EXPERTISE

Objective 5.1 Become a centre of philanthropy expertise.

ISSUE 2 Sustainable Development in Greater Montréal

STRATEGIC GOAL 2 Inform and Engage the Community

FOCUS AREA 6 RESOURCES AND DATA

Objective 6.1 Inform the community by publishing data on sustainable development issues in Greater Montréal.

Objective 6.2 Continue to publish *Vital Signs* reports and other studies on key issues affecting Greater Montréal.

FOCUS AREA 7 GRANT PROGRAMS

Objective 7.1 Engage the community via grant programs targeting vital issues.

Objective 7.2 Pursue the project support program via the proximity support component and the support for major partnerships component, in line with sustainable development issues.

Objective 7.3 Develop common objectives and new programs in collaboration with the FGM's funds and foundations.

Objective 7.4 Ensure that support is provided fairly across Greater Montréal, in particular on the two Indigenous communities.

FOCUS AREA 8 PARTNERSHIPS

Objective 8.1 Foster partnerships with key community leaders and organizations by focusing on social innovation.

Objective 8.2 Boost project effectiveness by favouring efforts to engage the community in the listening and co-creation processes.

FOCUS AREA 9 DEPLOY FINANCIAL CAPITAL VIA HIGH-IMPACT INVESTMENTS

Objective 9.1 Evaluate the possibilities of deploying financial capital via high-impact investments relating to sustainable development issues. Support initiatives from a sustainable development perspective.

Objective 9.2 Link high-impact investments to the development of projects at the community level.

FOCUS AREA 10 LISTEN TO AND INFLUENCE THE COMMUNITY

Objective 10.1 Engage in periodic consultations with community actors on the FGM's projects and activities.

Objective 10.2 Inform partners and institutions about community issues.

ISSUE 3 Developing a Strong, Ethical and Effective Organization

STRATEGIC GOAL 3 Build a Strong Public Image, and Set up Effective Governance and Management Structures

FOCUS AREA 11 COMMUNICATIONS: STRONG STRATEGIC PRESENCE, PUBLIC TRUST AND REPUTATION

Objective 11.1 Spotlight the impact of investments for sustainable development in the community.

Objective 11.2 Demonstrate the importance of creating funds and of fund creators' initiatives.

Objective 11.3 Promote responsible and effective management of the funds and of the FGM.

FOCUS AREA 12 INVESTMENT FUND MANAGEMENT

Objective 12.1 Aim for responsible governance of the investment fund by applying the investment policy.

Objective 12.2 Offer all services online while maintaining user security.

Objective 12.3 Ensure compliance with all securities regulations.

FOCUS AREA 13 FGM ADMINISTRATION

Objective 13.1 Continue to integrate operational data in ProDon.

Objective 13.2 Optimize internal management processes.

Objective 13.3 Implement accounting software adapted to the FGM's development needs.

Objective 13.4 Establish management reports with a view to measuring the achievement of objectives in relation to comparable performance standards (expenses-to-assets ratio, HR turnover rate, etc.).

Objective 13.5 Develop appropriate tools to ensure overall HR management, including suppliers (staff orientation, training, evaluations, succession, etc.).

Objective 13.6 Adapt the level of human and material resources to the FGM's needs.

FOCUS AREA 14 GOVERNANCE

Objective 14.1 Adapt the Board's competency profiles to the FGM's development needs by aiming for greater diversity.

Objective 14.2 Adapt the FGM's succession plan and internal structure.

Objective 14.3 Using the appropriate tools, regularly gauge employee engagement and satisfaction, in addition to the Board's effectiveness.