

## Strategic Planning 2026-2028

<b>Mission</b>	We enrich the quality of life across the valley by connecting donors with community needs, building permanent endowment funds, and investing in initiatives that create a vibrant and resilient region.	<b>Vision</b>	To build capacity within our thriving North Thompson Valley where all communities are connected, prosperous, and supported by a culture of local philanthropy.	<b>Values</b>	<p><b>Community-Centered:</b> We are guided by the needs and aspirations of the communities we serve.</p> <p><b>Integrity:</b> We are transparent, accountable, and responsible stewards of the resources entrusted to us.</p> <p><b>Collaboration:</b> We believe in the power of partnership and work with donors, charities, and leaders to achieve shared goals.</p> <p><b>Inclusivity:</b> We strive to create a sense of belonging and ensure our work benefits all residents in the valley.</p> <p><b>Long-Term Perspective:</b> We build legacies that will serve our communities in perpetuity.</p>
----------------	---	---------------	--	---------------	--

Priorities	Goals	Actions	Responsibility	Timeline	Progress/Evaluation
<b>Leadership, Collaboration and Communication</b>  Focus: <i>To be a recognized and trusted community leader that convenes partners and shares knowledge to build a stronger valley.</i>	To increase member retention, we will personally call all members by December 1, 2025, aiming to secure a 50% renewal rate from that group.	-Generate a complete list of members phone numbers -Create a call script and an opportunity list -Create a tracking system to confirm member information -Contact all members, Communicate member opportunities -Send immediate follow-up emails -Acknowledge volunteers publicly	Antoon Kawiria	End of 2025 On-going	-Track call completion rate using a spreadsheet  -Track call and email outcomes  -Record keeping on Google Drive
	To annually recruit at least two directors/volunteers each from Barriere and Clearwater and one each from the north, south and Simpcw First Nation regions.	-Create a one-page role description for directors and volunteers and a recruitment package  -Have personal conversations with potential candidates and use social media and our website to recruit candidates  -Host information sessions throughout the valley	All Directors	By AGM and repeats yearly	- Use annual stakeholder surveys to measure trust and recognition -Track the number of invitations to sit on the board and volunteer -Monitor positive media mentions and record
	To collaborate with local organizations to build long-term relationships with one funding and two activity partners annually.	-Build a list of potential organizations to collaborate with  -Have in-person meetings with customized proposals  -Send follow-up letters and meetings when needed	All Directors	End of 2028	-Track the number of partnership meetings hosted, the number of unique organizations engaged, and the number of joint projects launched.  -By 2028 we should have 3 funding partners and 6 activity partners

<b>Mission</b>	We enrich the quality of life across the valley by connecting donors with community needs, building permanent endowment funds, and investing in initiatives that create a vibrant and resilient region.	<b>Vision</b>	To build capacity within our thriving North Thompson Valley where all communities are connected, prosperous, and supported by a culture of local philanthropy.	<b>Values</b>	<p><b>Community-Centered:</b> We are guided by the needs and aspirations of the communities we serve.</p> <p><b>Integrity:</b> We are transparent, accountable, and responsible stewards of the resources entrusted to us.</p> <p><b>Collaboration:</b> We believe in the power of partnership and work with donors, charities, and leaders to achieve shared goals.</p> <p><b>Inclusivity:</b> We strive to create a sense of belonging and ensure our work benefits all residents in the valley.</p> <p><b>Long-Term Perspective:</b> We build legacies that will serve our communities in perpetuity.</p>
----------------	---	---------------	--	---------------	--

Priorities	Goals	Actions	Responsibility	Timeline	Progress/Evaluation
<b>Organizational Excellence</b>  Focus: <i>Leverage the Vital Signs Report to expand partnerships and initiatives, ensuring the North Thompson Communities Foundation has the governance, systems, and resources to effectively achieve its mission.</i>	To select, customize, and fully implement a new donor management system by the end of March 2026, successfully migrating all existing donor data and training 100% of the Board of Directors on its use.	-Create a donor database using past deposits and donation/ directors knowledge -Use a fully functional excel spreadsheet to enter data -offer Director training so 100% of the Directors understand the system	Treasurer	on-going	-March 2026 past donors completely entered into donor management system -100% of Directors trained -Annually update and review
	By the end of 2026, 100% of Board Directors must complete a non-profit governance training program covering fiduciary duties and strategic oversight, as well as completing additional training sessions annually.	-Provide a webinar basic workshop on being a director -Create a core list of 3 mandatory topics that all directors must complete -Create a list of important/interesting topics directors can take (1 per year)	All Board of Directors, managed by Chair	-List end of 2025 -Complete mandatory training in one year -On-going	-Track and record when Directors complete training -provide a list of topics and sign up form for on-line training session that Directors can use
	To develop and implement a comprehensive annual budget, with management presenting a budget-vs-actual variance report and financial forecast to the Board of Directors for review each quarter.	-Identify priorities based on Foundation Mission and Vision -Forecast donations, legacy gifts and interests -Regularly review and adjust our data to ensure that our programs are impactful evidence based	Treasurer	-Spring 2026   -Annually	- Annual budget presented annually at the AGM

Priorities	Goals	Actions	Responsibility	Timeline	Progress/Evaluation
	By the end of 2026, produce two data-driven impact reports for our website and one comprehensive annual report that uses infographics and client stories to demonstrate the value of our key programs.	<ul style="list-style-type: none"> <li>-Collect data and produce reports and graphics</li> <li>-Post in newsletters, social media, website and in person</li> </ul>	Board of Directors (possibly a committee)	<ul style="list-style-type: none"> <li>-October 2026</li> <li>-Year end 2026</li> <li>-Annually</li> </ul>	<ul style="list-style-type: none"> <li>- two data-driven impact reports completed and shared</li> <li>-comprehensive reports completed annually (starting in 2026) and shared</li> </ul>
	By the end of 2026, identify the top 3-5 areas of misalignment by completing an organizational 'Vital Signs' report, and develop an action plan to address these gaps in 2027.	<ul style="list-style-type: none"> <li>-Identify funding opportunities</li> <li>-Determine the key areas of organizational health you will measure</li> <li>-Select data collection methods (surveys, interviews, focus groups, etc)</li> <li>-Launch and analyze data</li> <li>-Design action plan</li> <li>-Create Report</li> </ul>	Board of Directors (possibly a committee)	<ul style="list-style-type: none"> <li>-early 2026</li> <li>-mid 2026</li> <li>-early 2026</li> <li>-Dec. 2026</li> <li>-2027</li> </ul>	<ul style="list-style-type: none"> <li>-misalignments identified</li> <li>-data collection methods created and distributed</li> <li>-50% of distributed collection methods received to analyze</li> <li>-action plan created</li> <li>-Board created report of Vital Signs</li> </ul>

<b>Mission</b>	We enrich the quality of life across the valley by connecting donors with community needs, building permanent endowment funds, and investing in initiatives that create a vibrant and resilient region.	<b>Vision</b>	To build capacity within our thriving North Thompson Valley where all communities are connected, prosperous, and supported by a culture of local philanthropy.	<b>Values</b>	<p><b>Community-Centered:</b> We are guided by the needs and aspirations of the communities we serve.</p> <p><b>Integrity:</b> We are transparent, accountable, and responsible stewards of the resources entrusted to us.</p> <p><b>Collaboration:</b> We believe in the power of partnership and work with donors, charities, and leaders to achieve shared goals.</p> <p><b>Inclusivity:</b> We strive to create a sense of belonging and ensure our work benefits all residents in the valley.</p> <p><b>Long-Term Perspective:</b> We build legacies that will serve our communities in perpetuity.</p>
----------------	---	---------------	--	---------------	--

Priorities	Goals	Actions	Responsibility	Timeline	Progress/Evaluation
<b>Philanthropic Growth</b>  Focus: <i>To grow the North Thompson Communities Foundation's assets and diversify funding sources to increase our granting and bursary capacity.</i>	To secure two letters of intent for new legacy funds within three years, with a combined estimated value of at least \$40,000, by launching a targeted marketing campaign, hosting three planned giving seminars, and holding personal meetings with 20 potential donors.	- Review current brochure and make changes if necessary -Have presentations, send to our members, send to organizations -Make a video about creating a legacy and publish on website and social media -Share with realtors and corporations	Fund Development committee, volunteer working group, and/or Directors	2028 on-going	-secured 2 legacy funds worth at least \$40,000 -records of campaigns, seminars and personal meetings held -list of potential donors
	To generate 10 new inquiries about our planned giving program by the end of 2027. This will be achieved by creating and distributing an estate planning brochure to at least 20 local lawyers, senior centers, health centers, organizations, and funeral homes by May 2026.	-Find appropriate information to be included in the brochure and create it -Create list of drop points -Devise means to monitoring plan (call drop points)	Fund Development committee, volunteer working group, and/or Directors	End of 2026 on-going	- estate planning brochures created and distributed -record organizations brochures distributed to -record all inquiries with contact information
	To increase total donations by 25% by 2028, through the execution of three distinct campaigns: a major donor campaign in 2027, an online peer-to-peer fundraiser in 2026, and a comprehensive year-end appeal in 2028.	-Launch a friends of the Foundation campaign in 2026 and 2028 -Raise \$100,000 in donations for our 25 year Anniversary Campaign in 2027	Fund Development committee, volunteer working group, and/or Directors	2026/28  2027	-records and totals of all donations from each campaign, including donor information

Mission		Vision		Values	
---------	--	--------	--	--------	--

Priorities	Goals	Actions	Responsibility	Timeline	Progress/Evaluation