

KIMBERLEY AND DISTRICT COMMUNITY FOUNDATION

"Building capacity for growth"



STRATEGIC PLAN

2025-2028



July 2025



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INTRODUCTION

This strategic plan was developed by KDCF's Board of Directors in spring 2025 to guide the foundation's growth through to 2028. It is intended as a living document, to be reviewed and updated annually, taking into consideration progress on priorities, new and emerging challenges and opportunities, and the overall stewardship of the foundation's funds and all associated activities. The Board gratefully acknowledges the time and energy of each person who provided input to this strategic planning process.

From 2001 to 2025

The Kimberley and District Community Foundation (KDCF) was established in 2001 to enhance the social welfare, health, and education of residents, preserve the environment, and advance arts, culture, and recreation in the Kimberley area. The Foundation's work is funded by interest earned on permanent endowments built through donations, bequests, and gifts from individuals and corporations. It serves the area defined by the former School District #3, including St. Mary's Lake, Wycliffe, Meadowbrook, Ta Ta Creek, Wasa, Skookumchuk, and Kimberley.

Key milestones:

2001: The KDCF was established and received an initial \$100,000 from the Vancouver Foundation and Columbia Basin Trust to create a Community Fund.

2001: The BC Games Legacy Fund was established with \$60,000 from the City of Kimberley's 1980 Winter Games legacy.

2002: The Bill Motek Memorial Fund was established with a \$75,000 donation to support the Pines Memorial and Development Society.

2008: The Winter Games legacy funds added \$12,500 to the Community Fund and \$37,500 to the BC Games Legacy Fund.

2010: The KSCU Fund was established with a \$125,400 endowment from the Kootenay Savings Community Foundation.

2013: The Theresa Cundiff Memorial Fund was established to provide grants to any charitable group in Kimberley.

2018: The BC 55+ Games contributed \$8,000 to the BC Games Legacy Fund.

The Foundation distributes funds annually through a public grant application process and a direct donation to the City of Kimberley from the BC Games Legacy Fund. As of July 2025, the KDCF has distributed over \$825,000 to local projects.



1. KDCF VISION, MISSION AND VALUES

Vision

A thriving, resilient, and welcoming community where local giving inspires hope and opportunity for all.

Mission

As a trusted steward of community-based funds, we work with donors and partners to create lasting social, cultural, and environmental benefits for our region.

Our Values

Community-centred

We place the needs and aspirations of Kimberley and district residents and communities at the heart of what we do.

Integrity

We act with honesty, transparency, and fairness in all our decisions and relationships, upholding the highest ethical standards in stewardship and community leadership.

Inclusivity

We foster a welcoming and inclusive environment that values diversity, ensuring equitable access and opportunities for all voices in our community to be heard and respected.

Partnership

We believe in the power of partnerships, working collaboratively with donors, nonprofits, and community members to achieve shared goals and maximize positive impact.

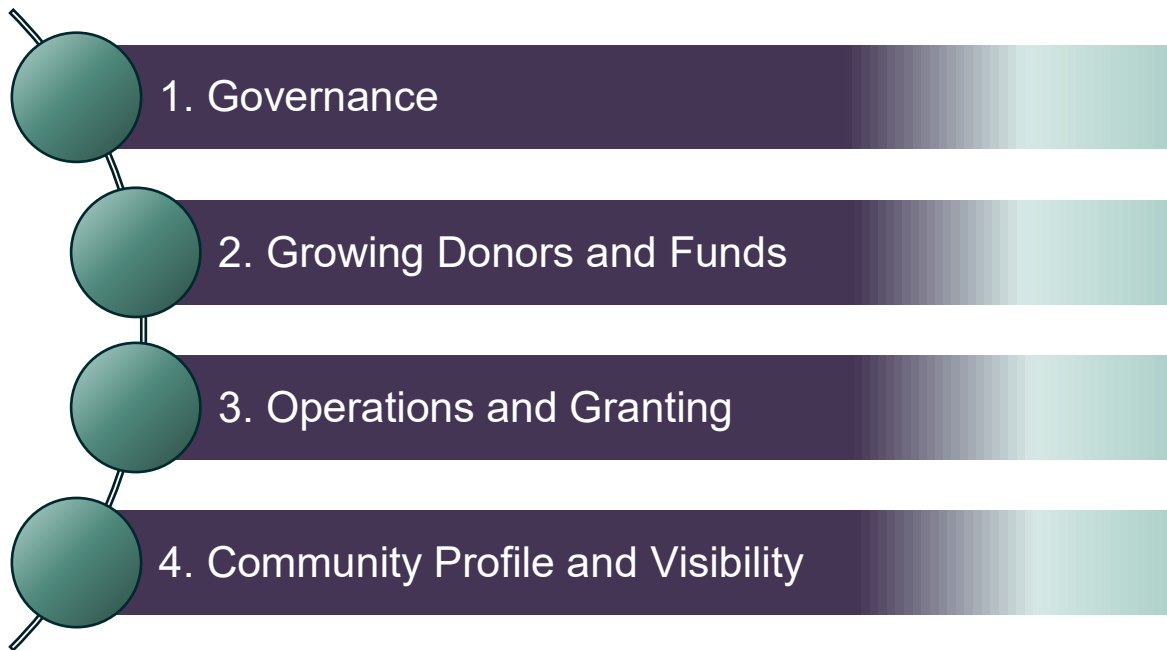
Sustainable Growth

We are committed to responsible stewardship and sustainable growth of the foundation and its endowment funds to ensure lasting benefits for our communities.



2. KDCF STRATEGIC PILLARS

This strategic plan is built around four strategic and interconnected pillars:



Each strategic pillar has aspirational goals accompanied by measurable objectives. The pillars should be understood as interdependent, functioning together like the four legs of a chair to keep the foundation steady, solid, and balanced, while at the same time providing core areas of focus for strengthening KDCF's effectiveness and overall impact. Section 7 provides a draft year-by-year workplan for the Board to refine and update as needed to align with its capacity and circumstances.



3. GOVERNANCE

Governance is the systems and processes by which the foundation is directed and controlled, ensuring accountability, transparency, and alignment with its stated purpose and values. Non-profit governance is rooted in legislation and common law, providing the legal framework for how societies are structured and managed. KDCF is a federally incorporated non-profit society.

Good governance enables KDCF to fulfill its mission, manage risks, and steward resources responsibly, while fostering participation and trust among members, stakeholders, and the broader community.



What success looks like:

- ⇒ Serving on the Board is fun, rewarding, and sustainable.
- ⇒ Well qualified individuals are approaching KDCF to serve on the Board.
- ⇒ Governance policies, roles, and structures are clear, relevant, and up to date.
- ⇒ KDCF is actively adopting relevant best practices for Canadian charitable organizations.¹

Goal 1: Renew KDCF's governance documents and structures

Objectives:

- Update KDCF bylaws
- Refresh KDCF's policy manual to reflect contemporary best practices for community foundations in Canada.²
- Establish Finance and Governance committees.
- Clarify roles, responsibilities, and expectations of directors, officers, and all committees.
- Seek synergies and efficiencies in scheduling regular meetings and governance and operational committee meetings.

¹ See, for e.g., <https://docs.google.com/spreadsheets/d/1CZ1v6RpvVCnB7bV1XeQ3J2KZh7mubTuDY3MkfCwss3l/edit>

² See, for e.g., <https://communityfoundations.ca/wp-content/uploads/2021/08/Key-Governance-and-Administration-Policies-Template-Guide-for-Canadian-Community-Foundations.pdf>



Goal 2: Strengthen recruiting and Board development

Objectives:

- Establish and apply a strategic recruiting process that supports Board development and succession planning needs.
- Develop an on-boarding info package and orientation process for new directors that includes a fund orientation.
- Seek to stagger Board terms, especially for officers, by securing Director commitments to serve between one to three years.
- Establish organizational learning objectives to increase Board knowledge and comfortability as agents of community philanthropy.

Goal 3: Streamline Board processes

Objectives:

- Implement a document management system.
- Create a shared Board calendar with all key dates.
- Improve financial reporting.

Goal 4: Engage strategic planning as a living process

Objectives:

- Review and update the strategic plan on an annual cycle to reflect current priorities.
- Use the strategic plan to set annual goals and priorities, and guide meeting agendas.

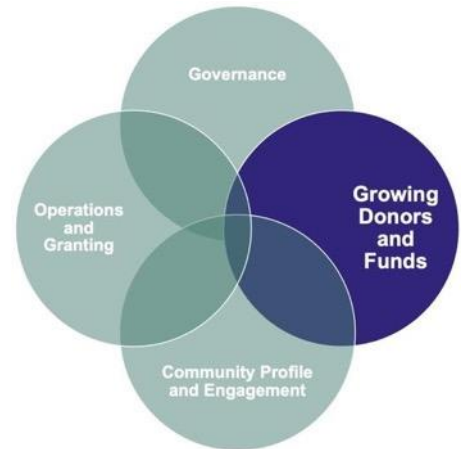




4. GROWING DONORS AND FUNDS

Increasing donors and funds is essential to advancing KDCF's vision and mission. By expanding our donor base and growing our endowment and operational funds, we enhance our ability to support local initiatives, respond to emerging needs, and create lasting positive impact.

This strategic pillar provides the essential scaffolding for identifying new supporters, deepening relationships with existing donors, and ensuring the sustainability of our foundation's work in service of our community's evolving priorities. Many goals and objectives in the other three strategic pillars will also play a key role in growing donors and funds.



What success looks like:

- ⇒ Substantial growth of endowment funds and donor base.
- ⇒ Consistent and on-going stewardship of donor relationships.
- ⇒ The Board understands and has the skills to effectively communicate the endowments model.
- ⇒ Community organizations, as well as individuals, ask to establish funds.

Goal 5: Increase Board knowledge and understanding of best practices and emerging trends in community-based philanthropy

Objectives

- Gather information, data, and insights from other community foundations about their successful donor attraction and retention and fund development practices.
- Establish organizational learning objectives to increase Board knowledge and comfortability as agents of community philanthropy.



Goal 6: Work towards a strategic donor and fund development strategy

Objectives

- Set and communicate clear annual targets for donor and fund development:
 - e.g., \$1M in endowment funds by 2026 AGM and 25th anniversary; increase KDCF's donor base by "x" %, year over year.
- Revitalize the Friends of the Foundation campaign.
- Actively and strategically gather local data and build community relationships to better understand KDCF's prospective donor base.
- Develop and execute simple and tactical donor attraction and retention plans that recognize donor contributions, strengthen relationships, and support organizational learning and capacity-building across the Foundation.
- Complete a fund development strategy.
- Establish a fund and donor development committee to lead this work.





5. OPERATIONS AND GRANTING

Efficient and effective operations and granting practices are at the core of what we do. They help us sustain trust with donors, partners, and the communities we serve. They can help prevent Board member burnout and are critical for the long-term success and resilience of the Foundation. This strategic pillar encompasses the essential systems, processes, and resources that enable the Foundation to fulfill its mission and maximize community impact. This includes building efficient and effective internal communications, ensuring fair and transparent grantmaking, and maintaining robust financial and administrative systems to steward resources responsibly.



What success looks like:

- ⇒ Sustainable and shared workload among Directors.
- ⇒ Clear roles and responsibilities for Directors and committees.
- ⇒ Effective internal operational systems and document management.
- ⇒ Streamlined grant processes with clear expectations for grant reporting.
- ⇒ A granting committee leading grant-related tasks.
- ⇒ Engaging qualified volunteers to help complete specific, time-bound tasks and projects.
- ⇒ Hiring a contract staff person.

Goal 7: Effective administration and operations

Objectives

- Create an operational calendar that incorporates all key dates related to donor management, granting, reporting, insurance, and communications.
- Establish standard templates and content for routine external communications.
- Distribute administrative and operations responsibilities so that the brunt does not fall solely on the President. Clearly communicate the tasks and expectations.
- Build internal communications protocols to support timely sharing of operational needs, tasks, and information.
- Determine operational funding needs during annual budgeting and use this amount to inform fundraising efforts.
- Complete the research and roadmap for creating a contract staff position.



Goal 8: Enhance KDCF's donor development, granting, and engagement systems

Objectives

- Implement digital tool(s) to facilitate the following core tasks:
 - Maintaining database(s) to support donor and grantee relations and communications. This should include shared document storage for secure handling of grantee and donor information.
 - Donors making one-time or regular monthly donations.
 - Create and distribute e-newsletters and marketing campaigns.
- Establish a granting committee to lead implementation of recent grant task group recommendations and to take responsibility for stewarding all aspects of the grant process.





6. COMMUNITY PROFILE AND ENGAGEMENT

This strategic pillar is central to strengthening the Foundation's visibility, building trust, and fostering meaningful relationships with donors, grantees, and other stakeholders. It encompasses all aspects of external communications, from developing clear and compelling messaging to executing targeted outreach and storytelling initiatives that highlight the Foundation's impact and values.

It also involves cultivating partnerships with local organizations, governments, and other sectors, and actively engaging donors, grantees, and community members in collaborative efforts. By investing in strategic communications and relationship-building, the Foundation enhances its profile, deepens community connections, and amplifies its ability to convene, collaborate, and drive positive change in alignment with its mission.



What success looks like:

- ⇒ KDCF is recognized and respected in the community, i.e., a “household brand name”.
- ⇒ KDCF is sought out as a valued community development partner and collaborator.
- ⇒ Prospective donors are connecting with KDCF because they see the Foundation as providing valuable ways to invest in the community.
- ⇒ Directors and ambassadors sharing the same message when talking about KDCF.
- ⇒ Individuals are asking to support KDCF through volunteering.

Goal 9: Build Compelling KDCF Messaging, Stories, and Brand

Objectives:

- Build a master deck of community presentation content that clearly communicates KDCF's value propositions for donors, grantees, and community impact and wellbeing.
- Plan annual sessions for Directors and ambassadors to explore, practice, and evolve how to talk about KDCF in meaningful and inspiring ways.
- Actively collect engaging stories about grantee projects, KDCF directors and donors and what motivates them, and what community foundations and local investing can do for communities.
- Create a visual identity branding kit.



Goal 10: Raise KDCF's profile in the community through in-person events, digital communications, and people sharing with other people.

Objectives:

- Host a "25th Anniversary / Achieving \$1M" community fundraising event in 2026.
- Participate strategically in community fairs and events.
- Establish a regular and sustainable strategic presence on social media.
- Ask grantees, collaborators, and partners to tag KDCF in relevant social media posts.
- Update the website on a regular cycle.
- Create and distribute an e-newsletter to donors, grantees, friends, and other supporters on a regular (and sustainable) cycle.
- Create a KDCF Ambassador program to support interested community members and businesses to grow the Foundation's presence, endowments, and impact.
- Complete a marketing and communications plan.
- Establish a marketing committee to lead the work of this pillar.





7. DRAFT WORKPLAN

This workplan is intended as a starting point for the Board to guide and coordinate its work, recognizing that the timing and priority of actions may shift in response to both internal and external circumstances.

The objectives / actions below are intended to achieve the objectives in the strategic plan; in some instances wording may differ from the objectives in the strategic plan.

Goal	Objectives / Actions	Lead
Year 1 (July 2025 to April 2026)		
Governance	Prioritize Year 1 objectives and actions to reflect Board capacity and budget, recognizing that some items may need to be deferred to Year 2.	Board
	Implement a strategic recruiting and on-boarding process that supports Board development and succession needs for Year 2	TBD
	Begin to stagger Board terms by securing Director commitments to serve between one and three years	TBD
	Adopt a privacy policy	TBD
	Establish Finance committee (FC) and Governance committee (GC) with approved Terms of Reference	Board
	Create a shared Board calendar with all known Board and governance-related dates.	TBD



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Goal	Objectives / Actions	Lead
	Improve financial reporting	TBD
	Implement a document management system (along with relevant protocols, security, and training/orientation on how to use it)	TBD
	Review progress on Year 1 objectives and actions and update strategic plan and Year 2 workplan prior to April 2026 AGM	Board
Grow Donors and Funds ³	Actively gather information, data, and insights from other community foundations about successful donor attraction and retention and fund development practices	TBD
	Identify Board learning objectives around key topics in community philanthropy.	Board
	Create and maintain a current donor list	GrC
	Start gathering local data and information to better understand KDCF's prospective donor base	TBD

³ CFC has a great resource for this: <https://communityfoundations.ca/wp-content/uploads/2022/03/Guide-Fund-Development-Mar29.pdf>



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Goal	Objectives / Actions	Lead
	Set and communicate clear fund development and donor targets at April 2026 AGM and/or 25 th anniversary event.	Board
	Revitalize the Friends of the Foundation campaign in conjunction with the April 2026 AGM and/or 25 th anniversary event.	TBD
Operations and Granting	Establish a Grants Committee (GrC) prior to the fall 2025 grants window to implement the recommendations/roadmap developed by the grants working group.	Board
	Create an operational calendar incorporating all key dates related to donor management, granting, reporting, policy and subscription renewals, insurance, communications, etc. [use the same app as for the governance calendar above]	GC, FC, GrC, and marketing task group
	Start creating standard design and content templates for routine external communications	Directors doing external comms
	Identify opportunities to better share administrative and operational tasks among Directors	Board
	Develop internal communication protocols to facilitate timely information sharing and collaboration	Board
	Initiate the research and roadmap for creating a contract staff position	TBD
	Research and assess digital platform(s) best suited to support KDCF with donor and grantee relations, monthly donations, document management, internal and external communications.	TBD



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Goal	Objectives / Actions	Lead
	Establish operational funding needs for Year 2 as part of annual budgeting (and incorporate into annual fundraising targets and campaigns)	FC
Community Profile and Engagement	Build a marketing and communications plan that reflects the Year 1 objectives and actions below.	Victoria
	Complete a master deck of community presentation content	TBD
	Update website and Facebook page.	TBD
	Establish a simple (starter) visual identity branding kit and guidelines	Victoria
	Develop a vision and plan for celebrating KDCF's 25 th anniversary and reaching \$1M in funds in 2026.	Board
	Participate strategically in local fairs and events according to Board capacity and availability.	Board
	Schedule a session before April 2026 AGM for Directors to explore and practice how to talk about KDCF to others in meaningful and inspiring ways. Add this to year 2 and year 3 workplan if feedback is positive.	TBD
	Start collecting and regularly (and sustainably) sharing KDCF stories and messaging on social media.	Victoria



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Goal	Objectives / Actions	Lead
Year 2 (May 2026 – April 2027)		
Governance	Identify Board learning and development priorities for Year 2 (for all pillars)	Board
	Update bylaws and adopt at April 2027 AGM	GC
	Begin updating the policy manual	GC
	Update and enhance strategic recruiting and on-boarding process to support Board development and succession needs for Year 3	GC
	Review and adjust regular Board meeting schedule if warranted as a result of establishing one or more committees.	Board
	Review progress and update strategic plan and Year 3 priorities, objectives, and actions prior to April 2027 AGM	Board
Grow Donors and Funds	Establish a fund and donor development committee (FDDC)	Board
	Set fund development and donor base targets for Year 2	Board
	Continue gathering local data and actively build community relationships to better understand and engage KDCF's prospective donor base	FDDC
	Start planning and executing simple and tactical donor attraction campaigns	FDDC



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Goal	Objectives / Actions	Lead
Operations and Granting	Establish operational funding needs for year 3 as part of annual budgeting	FC
	Choose and implement digital platform(s) for donor and grantee relations, internal and external communications, and monthly donations, if/as needed, including orientation and training.	“Tech Expert” with support from Board, GC, GrC, FDDC
	Assess organizational readiness to hire a contract staff person	Board
	Monitor and evaluate effectiveness of internal systems and identify opportunities for improvement before end of Year 2	Board
Community Profile and Engagement	Establish a marketing committee (MC)	Board
	Update marketing and communications plan	MC
	Decide whether to proceed with a full website refresh	Board + MC
	Participate strategically in local fairs and events according to Board capacity and availability.	Board
	Launch an e-newsletter for donors, grantees, and friends of the foundation (target 1x, 2x, or 4x year – whichever is sustainable)	MC
	Update the master presentation deck.	MC



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Goal	Objectives / Actions	Lead
Year 3 (May 2027 – April 2028)		
Governance	Review progress on strategic plan prior to April 2028 AGM and plan for a full strategic plan renewal in 2028.	Board
	Identify Board learning and development priorities for Year 2 (for all pillars)	Board
	Complete policy manual update	GC
	Review and adjust regular Board meeting schedule if warranted as a result of establishing one or more committees.	Board
Grow Donors and Funds	Recommend fund development and donor base targets for Year 3	FDDC
	Continue to develop and execute donor attraction campaigns, building on learnings and successes in Year 2.	FDDC
	Initiate development of a fund development strategy	FDDC
Operations and Granting	Hire a contract staff person (if not already in place) and update volunteer roles/responsibilities as needed.	Board
	Ask grantees for feedback on the granting process	GrC
	Update marketing and communications plan	MC



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Goal	Objectives / Actions	Lead
Community Profile and Engagement	Update the master presentation deck and website as needed	MC
	Start recruiting for a pilot “KDCF Ambassadors” program to help raise KDCF’s profile in the community	MC
	Explore new opportunities for KDCF to enhance its community profile and engagement.	MC
