



Strategic Directions 2023-2028

new challenges, bold responses

**CATHERINE
DONNELLY
FOUNDATION**

A new five-year strategic blueprint that addresses the climate emergency, the housing crisis and a loss of faith in democracy that caused deepened economic hardship and greater social injustice for our most underserved community members. Designed to advance justice, equity and inclusion through deeper collaboration – and in a manner that is meaningful and directed by those communities – this plan offers expanded support for grantees including increased multi-year funding opportunities and low-barrier application and reporting.

Strategic directions, 2023-2028

GREATER EQUITY AND INCLUSION

- More grants to BIPOC-led and BIPOC-serving organizations
- Increase dialogue, deepen relationships and continue CDF's engagement on reconciliation with Indigenous partners
- Deepened commitment to equity and inclusion in our investments, our impact investments and our shareholder engagement
- Ensure CDF's people reflect the diversity of the communities we support

MORE SUPPORT FOR GRANTEES

- Prioritizing long-term relationships
- Increased number of long-term grants over multiple granting periods and more operational grants
- Shortened application and reporting process and the opportunity for oral submissions
- Provide more capacity-strengthening opportunities to grantees

MORE COLLABORATION WITH GRANTEES & PEERS

- Supporting the networking of grantees
- Partner with other funders to avoid grantees submitting duplicate reports
- Partner with other foundations to share due diligence and maximize impact investment opportunities
- Lend CDF's voice to collective advocacy on non-profit sector policies where possible

Renewed Vision, Mission, and Guiding Principles

The Foundation refreshed the language of our Vision and Mission as part of a process to re-affirm our commitment to justice, inclusion and empowering those who are underserved.

OUR VISION

Committed to respect for the life and dignity of creation and all peoples, the Catherine Donnelly Foundation's vision is to collaborate with others to create a world where everyone has a voice and the opportunity to realize their full potential, a world open to dignity, transformation, justice, and peace.

OUR MISSION

The Foundation strives to transform the lives of the underserved by supporting initiatives in the areas of access to housing, the environment, and civic engagement for social change. We achieve this by funding, ethical investing and collaborating with organizations across Canada.



PRINCIPLES THAT GUIDE US AS WE IMPLEMENT THIS STRATEGIC PLAN

The principles guiding our strategic plan draw upon the values and ways of working of the founders, the Sisters of Service, our evolution as a foundation and the diverse expressions of culture, ceremony and faith represented across Canada. These principles are:

- + **Boldness and willingness** to take risks, such as increased funding for movement organizations and those not registered as charities
- + **Flexibility** to meet changing needs and contexts, such as the increased financialization of housing; a critical need for affordable housing and the growing recognition of the human right to housing; intensifying climate change impacts; polarization and emerging popular movements for social justice, including those for Indigenous self-determination and rights and Black Lives Matter
- + **Practicality and responsiveness** inspired by the Sisters of Service that is open to change
- + **Partnerships and collaboration**
- + **Simplicity of processes** for applicants, grantees, investees, staff, board and committee members
- + **Accessibility and accountability**
- + **Compassion, honesty, humility and incorporating diversity and inclusion** in all relationships
- + **Reflection on** individual and organizational **capacity, culture** and impacts of **our historical background** in all our relations
- + Make the most of opportunities to **influence**
- + **Honour the legacy and values** of the founders, the Sisters of Service
- + **A commitment in our work to fostering a regenerative economy**

Strategic Priorities

1. Grantees have been supported to create deeper impact through long-term initiatives, an increased number of multi-year grants, connections to other groups and funders, and capacity strengthening.

WHY IT'S IMPORTANT:

Funding is needed for both long-term strategies and urgent actions in our three funding areas. CDF has social capital that can boost grantees' effectiveness in the form of our national and funder networks and access to capacity strengthening opportunities.

WHAT IT LOOKS LIKE:

- + Co-develop and sustain long-term collaborative initiatives in each program area
- + 50% of granting budgets dedicated to 2-year grants and urgent action grants and 50% to 3- to 5-year grants
- + Support networking of grantees



2. The granting process is streamlined, accessible and fosters good relations with applicants and grantees.

WHY IT'S IMPORTANT:

We want to reduce the administrative burden on applicants and grantees as well as staff. Grantees generally seek longer, operational grants versus 1-year project grants. We seek to enact principles of trust-based philanthropy, including flexible and appropriate grant processes that promote strong relationships.

WHAT IT LOOKS LIKE:

- + Shorten the application and reporting process and allow for oral applications and reporting
- + Partner with other funders to avoid duplication of reporting and streamlined processes
- + Offer more 2-year grants so application and reporting process is less onerous

3. The endowment has undertaken investments, business partnerships and engaged in shareholder engagement that contribute to a sustainable just economy and produce returns to support our granting capacity.

WHY IT'S IMPORTANT:

CDF seeks to continue to have long-term impact by maintaining our endowment size. We seek to use all our financial resources for the good of people and the environment. We aim to continuously improve our investment approach, including applying emerging knowledge and practices that embrace equity and inclusion in investing.

WHAT IT LOOKS LIKE:

- + Ensure our investments contribute to the U.N. Sustainable Development Goals
- + Shift the portfolio investment policies to include positive screens - companies that are part of a regenerative economy - as well as existing negative screens and adopt a portfolio-wide approach to impact investments for assessing social impact and financial returns
- + Strengthen partnerships with other Mission Related Investment foundations to maximize impact, streamline due diligence and share our impact investing story

4. Deeper and expanded relationships have been developed with organizations led by and serving Black, Indigenous and People of Colour communities.

WHY IT'S IMPORTANT:

BIPOC communities are the source of knowledge and practices needed to create a more just society and regenerative economy. BIPOC communities are historically underserved by philanthropic and investment dollars. Changing this is part of the path to social change.

WHAT IT LOOKS LIKE:

- + More grants to BIPOC-led and BIPOC-serving organizations
- + Increase dialogue and deepen relationships with Indigenous partners
- + Promote environment, civic engagement for social change and housing grant opportunities among BIPOC-led and -serving organizations and networks
- + Listen, learn from and respond to what Righting Relations' network members and other BIPOC-led grantee groups are doing, what resources they seek, as well as the issues they want to address

5 to 7. Improve CDF operational practices and processes related to internal assessment, communications and collaborations, people power and engagement with inter-faith communities.

WHY THIS IS IMPORTANT:

Sharing experiences encourages progressive practices among other funders and investors and we are stronger learning and advocating together. Ongoing assessment provides information to improve program effectiveness. Our staff, board and committee members are the heart of our work, and we aim to support contributions by all, while ensuring succession and diverse contributions.

WHAT IT LOOKS LIKE:

- + Contribute to dialogue to improve policy and practice in philanthropy and the non-profit sector and lend CDF's voice to collective advocacy where possible
- + Develop and implement a grant evaluation strategy and an assessment strategy for impact investments
- + Continue to diversify board, staff, and committee membership to ensure we reflect the communities we support
- + Recruit and support people of relevant experience and diverse life experiences to make active contributions through key roles
- + Encourage dialogue with faith-based organizations on use of assets for community benefit
- + Continue to evolve CDF's commitment to reconciliation with Indigenous communities and share publicly

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