INTRODUCTION

Established in 2003, the Catherine Donnelly Foundation is the financial legacy of a remarkable group of women religious, the Sisters of Service. The Foundation is a living testament to the Sisters’ tradition of response to the greatest needs in communities across Canada. The Catherine Donnelly Foundation is committed to promoting positive social change by funding a combination of programs and projects in our priority areas of Environment, Housing, Adult Education and Impact Investing.

The next five years will see the Catherine Donnelly Foundation consciously integrating an Indigenous-influenced perspective/lens into our work by engaging in an educational process that would foster a deeper understanding of Indigenous issues as well as sharing and using the learning from the Adult Education’s Righting Relations program. A commitment to meet the 10% Impact investing goal was reaffirmed with the understanding that additional resources (staff) may be required. The Board affirms and carries forward the Sisters’ values and legacy while implementing programs that are responsive to the ever-changing needs of society/environment.

Philanthropic Approach

Since 2008, the Foundation has been utilizing an ambitious program strategy that allocates a significant portion of its grant monies to more focused and long-term work intended to address the root causes of many of the key issues in each of its program areas.

In the spring of 2013, the CDF’s Strategic Session reaffirmed this orientation and suggested that where possible the Foundation pay particular attention to the needs of women, Indigenous, immigrants and the faith community in its project funding and program development. The Foundation will continue to prioritize these constituencies.

In this context, the Foundation has:

- Increased the portion of its resources (financial and human) in long-term program work with stated social change objectives in collaboration with a select group of partners, with the intention of promoting alliances with social movements and like-minded foundations.
- Enhanced its program strategy in all three of our funding areas, including second-generation\(^1\) support in environment and housing and launched a new program in adult education.
- Reduced the portion of our resources available to the project (short-term) component of our funding mandate for our environment and housing areas of focus in favour of new long-term funding strategies.

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1. Second-generation refers to the decision by the board to renew our commitment to youth homelessness and to the right to a healthy environment programs for another 5-year term.
Strategic Priorities for the Next Five Years

1. Integrate an Indigenous-influenced perspective/lens into our work

The Foundation is intent on integrating Indigenous-led initiatives and perspectives in our work in response to the Truth and Reconciliation Commission Recommendations (Calls to Action). We recognize that we are well situated to integrate Indigenous-influenced perspectives but have not yet maximized the learning from our work with Indigenous-led and/or Indigenous-focused initiatives. Our intention is to:

- Foster a deeper understanding of Indigenous issues and perspectives.
- Implement CDF's commitment to the Philanthropic Declaration of Action through an engaged educational process.
- Engage with and learn from Indigenous communities to strengthen existing relationships and to build new ones.
- Explore the concept and process of decolonizing CDF's work. This would include assessing our application process to ensure that it is more accessible to Indigenous-led initiatives.
- Increase the presence of Indigenous people on our board, committees and funding partnerships.

2. Advance and Resource Impact Investing

In recent years, CDF has come to identify the investment of its capital resources as the fourth pillar in its strategy for promoting positive social change in its specific mandate areas, and with society more broadly. Present policy calls for CDF to invest up to 10% (approximately $4M) of its capital in impact investments. CDF made its first official impact investment in 2014. Since then, CDF has made six additional impact investments bringing us to roughly 1/3 of our impact investment target. Over the next five years, we will develop a comprehensive action plan to fully realize the CDF's commitment of deploying 10% of its capital in impact investments. We will also consider how to integrate impact investments more closely with granting.

3. Broaden our Impact through increased public presence

The CDF is committed to working with others to bring about the social changes it desires and as a result maintains membership or formal affiliations with a number of networks (i.e. Philanthropic Foundations Canada, Canadian Environmental Grantmakers Network, The Circle on Philanthropy and Aboriginal Peoples in Canada, Responsible Investment Association and SHARE). On the principle that one can do more together than alone, the CDF is open to building relationships with allies and collaborators within the social and philanthropic sectors. We will increase the profile of the CDF in the public arena so we can further our mission by amplifying grantee voices, and share our progressive practices to influence the public and philanthropic space.
Strategic Priorities for the Next Five Years

4. Strengthen Our Organization

Diversity Commitment: The board is committed to engaging in a board recruitment process that would see, over the next five years, a greater representation of the constituencies that the CDF supports recruited on the board.

Building Staff Capacity: The board will build and support a staff structure capable of efficiently administering and meeting the strategic objectives of the Foundation, such as impact investment, program development, networking and public relations.

Cross Committee Learning & Adult Education Process: Currently, in an effort to break down silos between the various committees, the CDF incorporates a “cross-committee learning session” on a rotational basis as part of its spring Board meeting. The board will continue to explore more crosscutting work between housing, environment and adult education including investment opportunities in housing, Indigenous-led initiatives and green/sustainable energy. Board meetings will incorporate adult education & decision-making models/practices.