

# CONNECTING INSPIRING CREATING CHANGE



## 2017 YEAR IN REVIEW

### A NEW THREE-YEAR PLAN

We spent 2017 talking to our members and thinking about the changing context for philanthropy in Canada. A new generation rising, constant and rapid change in technologies of all kinds, complex and urgent challenges facing Canada and the world...all of these demand a strong and forward-looking strategy to support growth, collaboration and focus in Canadian philanthropy. From these conversations with members, the PFC Board developed and unveiled a new plan in June 2017. This plan will be our guide to connect, inspire and create change with our members and collaborators over the next three years.

### OUR BRAND NEW LOOK

In conjunction with the strategic plan, PFC consulted with members to help define a new brand. Our brand launched in March of 2018 and reflects PFC's emphasis on connection, inspiration and creating change.

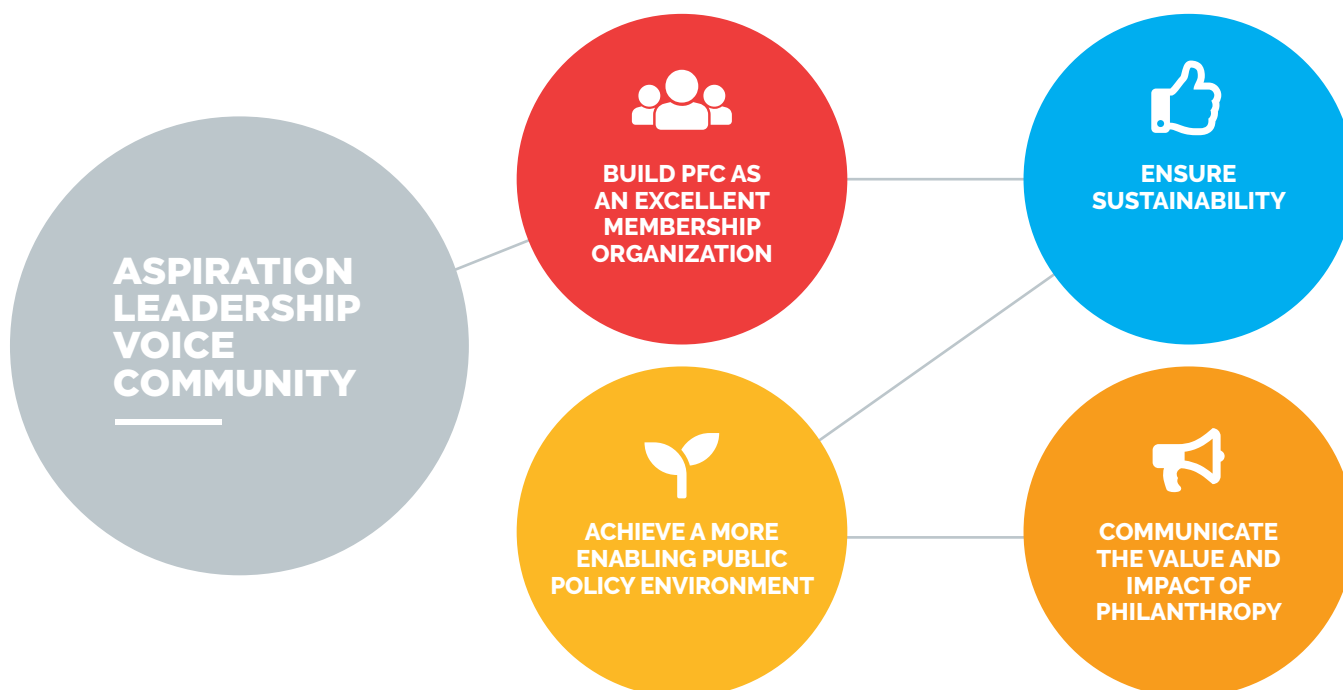
### WHAT STAYS THE SAME AND WHAT CHANGES

PFC will continue to provide excellent service and exclusive benefits for its members. We will continue and improve our capacity to provide thought-leadership by disseminating and sharing pertinent information and trends in organized philanthropy.

We will expand our role in facilitating collaboration and peer exchange and we will work closely with members and partners to create an enabling environment for organized philanthropy by engaging policymakers and other key stakeholders.

## PFC 2017-2020 STRATEGIC PLAN

CHAMPIONING ORGANIZED PHILANTHROPY IN CANADA



## CONNECTING, INSPIRING AND MOBILIZING PHILANTHROPIC ACTION

PFC is a network that inspires and mobilizes philanthropic action, by engaging members in collaboration, learning and sharing, and providing resources to support their work.

### REGIONAL EVENTS AND WEBINARS

We created opportunities for members to meet, discuss and learn from each other and from leaders in the field on various issues and trends in philanthropy. We also partner with other organizations to offer additional learning opportunities.



8

WEBINARS



16

NETWORKING  
EVENTS



1

SKILLS-BUILDING  
ROUNDTABLE

**1 000+**  
CONNECTIONS

**100+**  
HOURS OF EXCHANGE

**30+**  
EVENTS

### MONTREAL SYMPOSIUM

**OVER  
200  
LEADERS**

#### LISTEN. LEARN. ACT. THE OPPORTUNITIES FOR CANADIAN PHILANTHROPY.

We engaged in lively and searching conversations about the practices, assumptions and biases that shape Canadian funders' listening and learning about the communities and issues with which they work.



### GRANTMAKERS AND GOVERNMENT: THE POSSIBILITIES OF PARTNERSHIP

PFC published a new guide to examine the potential of partnering with government.

The guide describes how foundations have moved policy agendas forward and includes case studies and lessons learned on how to achieve successful government-foundation collaborations.

### AFFINITY GROUPS

Mobilizing  
philanthropic  
action around  
communities of  
practice.



In consultation with our members, PFC has committed to bring together thought-leaders in communities of practice to increase collaboration and mobilize action. PFC has created a knowledge mobilization role within its organization to support this work in 2018.

## PFC SUPPORTS THE SHARED VISION OF OUR MEMBERS

2017

Communicating the value and impact of the work of organized philanthropy. PFC conducts strategic research and data collection to support and guide that work and identifies and pursues targeted public policy changes that will achieve a more enabling public policy environment.

### COMMUNICATIONS

Through blogs, social media, video and our newsletter, PFC shares the value and impact of organized philanthropy in our communities. Over the last year, **PFC has ramped up its communications efforts by increasing its engagement on social media** and inviting guests to spark discussions on our blog.



**10 000+**  
WORDS ON PHILANTHROPY

**1 000+**  
POSTS, LIKE AND SHARES

**10+**  
BLOGS POSTED

### A PORTRAIT OF CANADIAN FOUNDATION PHILANTHROPY

In collaboration with Community Foundations of Canada (CFC), we developed a profile of the work of grantmaking foundations in Canada. **PFC continued its own research to provide an overview of grantmakers in Canada** with a snapshot of the assets and grantmaking of Canada's top 150 foundations.

### PHILANTHROPY IN ACTION

As part of our effort to highlight the role and impact of organized philanthropy

**WE LAUNCHED PHILANTHROPY IN ACTION**



a website where you can find inspiring stories about the work of foundations and glimpses of the unique value contributed by strategic work of foundations in community.

## AN ADVOCATE FOR A MORE ENABLING PUBLIC POLICY ENVIRONMENT

2017

PFC is advocating for the modernization of the federal legislative and regulatory framework because we believe that this will lead to a more enabling policy environment for charitable foundations.

In 2017, PFC led a coalition of philanthropic and charitable organizations working to advocate for the implementation of changes to the federal definition of "political" activities of charities. This followed on important consultations with the charitable sector in late 2016. These consultations led to a Sector Panel Report in the spring of 2017 recommending that the federal government clarify its regulation of "political" activities of charities and go further in modernizing the legislative framework for Canadian charities.

- PFC submitted a brief in August 2017 to the pre-budget consultations of the Standing Committee on Finance focused on improved regulation of impact investing and program-related investing activities of charitable foundations.
- PFC joined leading organizations in the charitable sector for a Day on The Hill in October 2017, meeting with federal politicians and educating them on the role, impact and needs of the charitable sector.

# CREATING AN ORGANIZATION THAT IS FLEXIBLE AND POISED FOR GROWTH

2017

PFC is ensuring sustainability by investing in its organizational capacity. In the last year, PFC has undergone a review of its business model, and implemented a data management system to support growth and attract new members.

## ABOUT OUR MEMBERS



**57%** OF ASSETS  
OF PRIVATE FOUNDATIONS  
IN CANADA

**38%** OF THE 50  
LARGEST GRANTMAKERS IN  
THE COUNTRY

**\$493** MILLION IN GRANTS AND **\$401** MILLION  
SPENT ON CHARITABLE ACTIVITIES IN 2016  
BY OUR MEMBERS

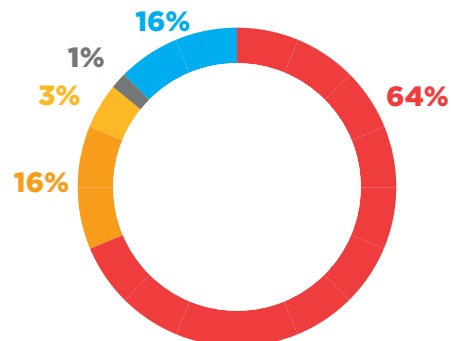
Find out more: [pfc.ca/about/our-members](http://pfc.ca/about/our-members)

## 2017 SUMMARY OF REVENUES AND EXPENSES

The summary financial statements below are derived from the financial statements for 2017, which were audited by Mongiat Bernucci LLP. PFC's full audited financial statements are available by request or on our website at our Annual Report section.

### REVENUE:

Membership dues	\$744,842
Special grants	\$181,500
Program fees	\$6,902
Other revenue	\$45,462
Conference fees and sponsorships	\$184,220
<b>TOTAL</b>	<b>\$1,162,926</b>



### EXPENDITURES:

Membership services	\$450,603
Salaries and benefits	\$489,676
Office operations	\$128,177
Conference	\$166,322
<b>TOTAL</b>	<b>\$1,234,778</b>

