



Foundation of Greater Montréal

# The Foundation of Greater Montréal, *your* Foundation

STRATEGIC PLAN **2022-2026**





# Territorial acknowledgement

The Foundation of Greater Montréal (FGM) wishes to highlight the presence of the Kanien'kehá:ka of the Kahnawà:ke and Kanehsatà:ke communities, which have historically been established on the territory now known as Greater Montreal. It wishes to recognize as well that this territory has also been home over time to several Indigenous nations who established themselves here over several historical periods. Today, a diverse Indigenous population, including First Nations, Métis and Inuit individuals, continues to reside on this territory, in socioeconomically varied conditions.

Greater Montreal has long been a place for interaction and exchange among the First Peoples, and is a historic site where the Great Peace of Montreal was signed by 39 First Nations in 1701. In the spirit of peace, justice, and reconciliation, and by drawing inspiration from the ancestral knowledge of the First Peoples, FGM is working to enhance the well-being of the communities of Greater Montreal, and to protect its territory, now and for future generations.

Community foundations are charitable organizations that devote themselves to improving living conditions in communities in specified geographic areas by attracting and investing charitable gifts from donors to create endowment funds, then redistributing the income produced by these investments in the form of grants to community organizations. Community foundations also play a key social role: they monitor the quality of life in their area, and they match people with resources and ideas so as to build stronger and more resilient communities.



# The Foundation of Greater Montréal: Ready to meet the challenges of a world in transformation


The Foundation of Greater Montréal (FGM) celebrated its 20 years of existence in 2020, which also turned out to be the year when the entire world was gripped by the largest pandemic in a century. This unprecedented event was the backdrop to the strategic plan you see before you. As a community foundation, FGM had to adapt, reinvent some of its ways of doing things, strengthen collaborative relationships, and respond in an agile way to the urgent needs of our community. The vision that is at the core of this plan emerged as FGM experimented with these new methods and practices.

FGM is at a pivotal moment in its history. Empowered by the growth it has experienced in recent years, it has reached a scale and a level of maturity, in terms of assets under management, philanthropic and community expertise, and staff competence, that enable it to innovate and to set new and more ambitious goals for itself. We want to increase available philanthropic resources, and their impact, using evidence-based practice; stimulate new community and philanthropic collaborations; raise awareness of the issues our community faces; and make FGM widely known throughout Greater Montreal. With these key elements, we believe we can strengthen our already singular position in a philanthropic universe that is undergoing a major transformation. FGM will stand out through its agility, competence and impact.

This strategic plan is the result of the largest consultation FGM has ever carried out in its community. As a community foundation, it was critical for us to be actively listening to our stakeholders. And that is exactly what we did by reaching out to nearly 700 people, conducting individual interviews and organizing workshops with dozens of intervenors from the philanthropic and community sectors. Their input enabled us to see that there is a wide consensus on FGM's strengths, its relevance and the values that should propel it, with one key word at the heart of it all: collaboration. Above all, we were able to observe the strong feeling of belonging our constituents have to their community foundation. We are grateful to you for it.

As we prepare to implement this five-year plan at the start of what will likely be a critical decade, we should highlight the findings of the *Vital Signs of Greater Montreal* report we published in June of 2020, which gave an overview of how our region had progressed since the turn of the millennium in terms of the Sustainable Development Goals (SDGs). The reality is undeniable: despite an increase in GDP of 17% per capita over 20 years, we have made little headway – and sometimes none – on numerous socioeconomic and environmental indicators, particularly in populations made up of individuals of diverse backgrounds. We have to look hard at the root causes of this situation and redouble our efforts to move the SDGs farther along in Greater Montreal, all while sustaining justice, equity, diversity and inclusion. This will be one of the major priorities of our five-year plan. We therefore call on the entire Greater Montreal community to join us in taking up these challenges. The Foundation of Greater Montréal is *your* foundation, and we're ready to get to work.

 **KAREL MAYRAND**  
PRESIDENT AND CEO

 **KATHY FAZEL, CFA, ICD.D**  
CHAIR OF THE BOARD OF DIRECTORS



## VISION

The Foundation of Greater Montréal has a vision of a community that is free of poverty and discrimination, where all can realize their potential and live in a healthy environment, now and in the future.

## MISSION

The Foundation of Greater Montréal is here to serve and listen to its community. In collaboration with its partners, it mobilizes philanthropic resources, disseminates knowledge, sparks initiatives and supports its community, all with a view to advancing the Sustainable Development Goals (SDGs) in Greater Montreal.



# VALUES

## JUSTICE, EQUITY, DIVERSITY, INCLUSION

Work to eliminate all forms of discrimination. Amplify the voices of underrepresented groups and ensure that every individual feels included, valued and respected.

## COLLABORATION

Facilitate the sharing of skills and ideas, and bring together the community's strengths.

## LISTENING

Be attentive to the needs and solutions identified by the community, and nurture relationships based on trust.

## CREATION AND INNOVATION

Experiment with, and adopt, innovative approaches so as to increase our agility as well as our impact in the community.

## INTEGRITY

Demonstrate honesty, transparency, high ethical standards, humility, accountability and professionalism.

# Statement on justice, equity, diversity and inclusion

The values of justice, equity, diversity and inclusion are at the heart of the Foundation of Greater Montréal's mission. FGM aspires to be a reflection of the community it serves.

In order to break down barriers, and work towards an inclusive society, FGM will listen, learn, and implement purposeful measures in its own organizational culture, its granting activity, its investments, its decisions and its actions. It acknowledges the existence of factors of discrimination towards individuals and groups, manifested both directly and systemically in our society, as well as the intersectionality of different types of discrimination that can be experienced simultaneously, and should not be dissociated nor seen as having a hierarchy.

### AT THE SAME TIME, FGM COMMITS ITSELF TO:

- continuously making structural changes in its practices, including in its investments and its granting;
- pursuing a program of continuing education on issues of justice, equity, diversity and inclusion;
- contributing to raising awareness among stakeholders and offering spaces for dialogue, exchange and understanding;
- ensuring that the composition of its staff, its volunteer pool and the resources it draws upon reflect the community it serves;
- measuring and evaluating its progress in these areas.



# Advancing the Sustainable Development Goals in Greater Montreal

Since 2017, FGM’s framework for action has been the United Nations’ Sustainable Development Goals. These 17 global goals guide FGM’s interventions and allow it to gauge the Montreal community’s social, economic and environmental progress, while making it part of a worldwide movement.

- GOAL 1.**  
No Poverty
- GOAL 2.**  
Zero Hunger
- GOAL 3.**  
Good Health and Well-Being
- GOAL 4.**  
Quality Education
- GOAL 5.**  
Gender Equality
- GOAL 6.**  
Clean Water and Sanitation
- GOAL 7.**  
Affordable and Clean Energy
- GOAL 8.**  
Decent Work and Economic Growth
- GOAL 9.**  
Industry, Innovation and Infrastructure
- GOAL 10.**  
Reduced Inequalities
- GOAL 11.**  
Sustainable Cities and Communities
- GOAL 12.**  
Responsible Consumption and Production
- GOAL 13.**  
Climate Action
- GOAL 14.**  
Life Below Water
- GOAL 15.**  
Life on Land
- GOAL 16.**  
Peace, Justice and Strong Institutions
- GOAL 17.**  
Partnerships for the Goals



In order to maximize its impact and act effectively in the context of the dynamic and complex relationships that exist among the SDGs, FGM will prioritize six broad areas of intervention. Among them, they will cover all the elements in the SDGs: it will continue to support culture, education and health, causes which have always been close to the hearts of donors in Greater Montreal; it will also support social equity, ecological transition as well as diversity and inclusion, seeking to back initiatives that will impact more than one of these three areas. FGM will also prioritize a systemic approach to problems.

# Our six broad areas of intervention



## Culture

FGM has a long-standing and deep connection with the cultural sector. Acting as a philanthropic partner for dozens of cultural organizations, it will continue to collaborate in several matching programs, supporting and guiding these organizations in their philanthropic development initiatives.



## Health

More than ever, health is a crucial community issue. FGM will continue to support health sector institutions in Greater Montreal and initiatives that aim to have an impact on health determinants or improve health indicators in its region, notably among vulnerable or disadvantaged populations.

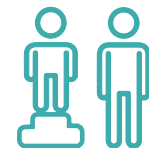
**SDG 3**



## Education

Education is a key lever for increasing social inclusion and combating socioeconomic inequalities, as well as being vital to active citizenship. FGM will continue to support learning institutions, foster academic success and be involved in the fight to keep kids in school. It will in particular target the most challenged populations and areas in Greater Montreal.

**SDG 4**



## Social Equity

FGM will intervene to address a number of factors that contribute to perpetuating the cycle of social inequality. It will support the fight against poverty and will work on its determinants and its impacts, be it with regards to food security, education, health, housing or employment. It will also invest in new models of social and economic development in communities.

**SDG 1-2-8-10-16**



## Diversity & Inclusion

FGM aims to use an intersectional approach to combat all forms of discrimination, in particular those based on gender, sexual orientation, age, functional limitations, religion, ethnic origin, culture and socioeconomic status. Working with an approach that involves listening and collaboration, it will give funding priority to initiatives that seek to empower populations affected by discrimination. Specific initiatives will be deployed to assist Indigenous populations living on the territory of Greater Montreal.

**SDG 5-10, as well as the application to SDGs as a whole**



## Ecological Transition

FGM seeks to hasten the socio-economic changes that will allow our society to respond to the climate crisis, preserve biological diversity and maintain the natural systems that sustain life on Earth. It will seek to reduce environmental inequalities and back initiatives that create healthy living environments that are low-carbon and resilient for all.

**SDG 6-7-9-11-12-13-14-15**



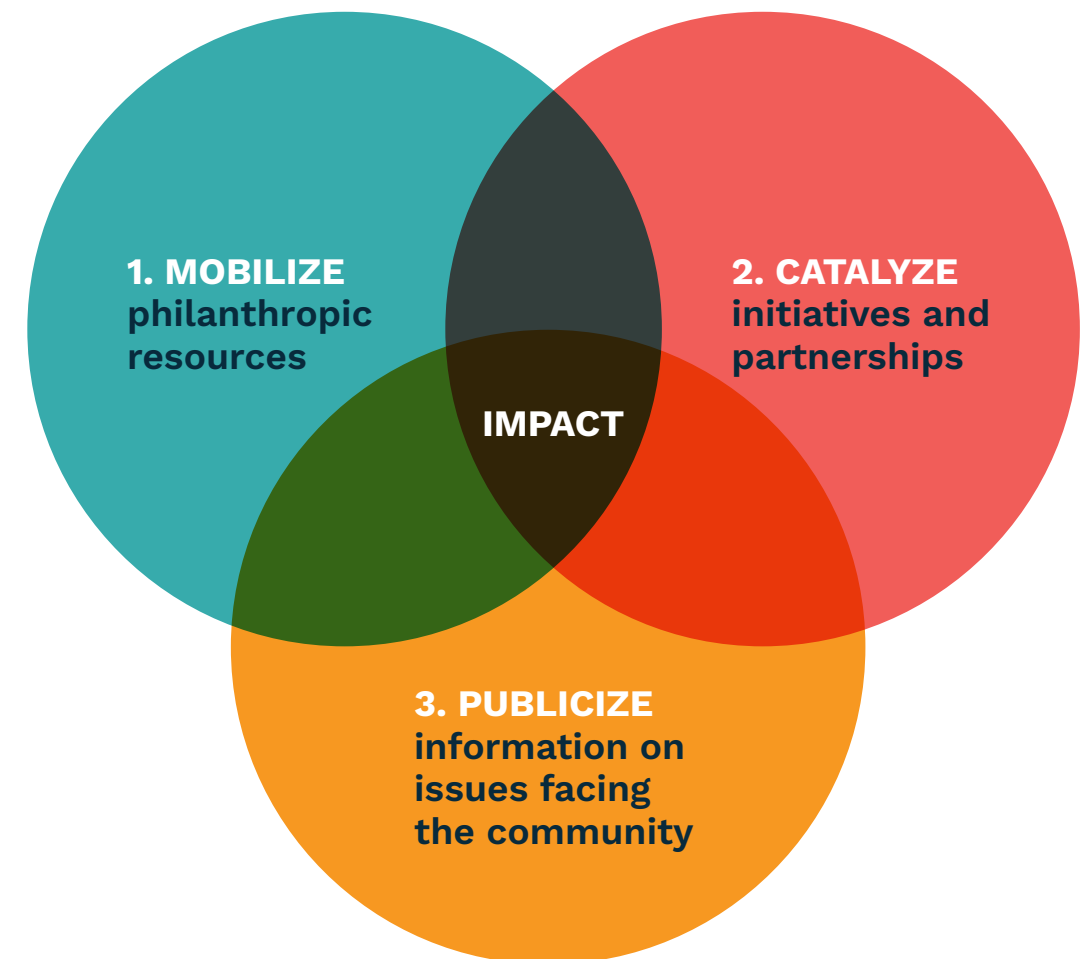
# Our commitment to impact: Mobilize, Catalyze, Publicize

We have a vision of a community that is free of poverty and discrimination, where all can realize their potential and live in a healthy environment, today and in the future. We strongly believe that we have the tools at our disposal to make this vision a reality, if we can innovate for the mobilization and better distribution of the financial resources that already exist in Greater Montreal, and place them at the service of intelligence, creativity and solutions that can meet our community's needs.

As a community foundation, we are an ideal bridge for matching philanthropic resources to needs identified by our stakeholders. We offer our donors a wide range of diversified services and a personalized approach, with a goal of increasing both the amount of available philanthropic resources and the impact they have in the community.

We work to foster collaboration in every way possible. We seek out what is strongest in our community, and bring these forces together to spark foundational initiatives that have the potential for major impact. Using evidence-based practice, proven methods and innovative approaches, we seek to act in a systemic way to advance diversity, inclusion, social equity and ecological transition throughout Greater Montreal.

We act so as to place philanthropy at the service of the community, adopting a philosophy of justice and equity. We favour community-inspired solutions, and act with humility and by listening actively, while amplifying the diverse voices of the community. We disseminate and share knowledge on key issues so as to strengthen the community's capacity for action.





# FOCUS AREA 1

## Mobilize philanthropic resources

The Foundation of Greater Montréal provides a range of varied services at competitive rates, as well as guidance and personalized advice to its donors, with the aim of increasing available philanthropic resources and their impact. FGM distributes several millions of dollars in grants each year in the community, and mobilizes all of its assets in support of the United Nations' Sustainable Development Goals, through an ambitious responsible investment and impact investment strategy.

### GOALS

- Increase the amount of philanthropic funding supporting the community.
- Engage FGM's assets and resources in support of the Sustainable Development Goals and of culture.

### LEVERS

- Manage assets with rigour and implement a responsible investment policy.
- Increase and diversify sources of philanthropic funding so as to make them representative of our whole region and of our community's diversity.
- Support organizations that are creating funds in their philanthropic development.
- Maintain our fund creators' loyalty towards FGM by providing services that are varied and adapted to them.
- Pursue the effective management of matching programs, in culture in particular.
- Increase the annual budget allocated to FGM's programs.

### TARGETS

- 1 Reach \$525M in assets under management by 2026.
- 2 Keep operating costs at 1% of FGM's assets.
- 3 Manage the assets of the FGMIF according to ESG principles (including 10% in impact investment by 2024).
- 4 Bring to 15% the share of our annual distribution available for community-based programs, by the end of 2026.
- 5 Ensure that contributions are made from 10 of FGM's program-oriented funds each year.
- 6 Create an average of 60 new funds each year, including 10 from new target groups, and reach 1,000 funds in 2026.
- 7 Continually survey, and maintain a high level of satisfaction among, fund creators.





# FOCUS AREA 2

## Catalyze initiatives and partnerships

The Foundation of Greater Montréal emphasizes collaboration and agility in its actions. We adopt a posture of humility and emphasize listening in order to bring philanthropy closer to the community, and prioritize solutions that the community itself has identified. We bring together everything that is strong in our environment to spark foundational initiatives that have a large potential for impact. We seek to intervene in a systemic fashion to advance the Sustainable Development Goals (SDGs), by assisting organizations and using evidence-based practice, proven solutions and innovative methods.

### GOALS

- Increase the reach and impact of FGM grants in order to contribute to the SDGs' progression.
- Bring together philanthropic, institutional and community actors to implement collaborative solutions.
- Respond with agility and innovation to the needs expressed by the community.

### LEVERS

- Facilitate collaborations and mobilize multiple actors so as to increase the reach and impact of our actions.
- Develop relationships that are based on trust, by listening more actively to those we interact with and providing solutions that are varied and tailored to the needs identified by the community.
- Consolidate our skills in order to more effectively benefit from government granting programs.
- Develop methods for measuring the impact of the grants we distribute, using SDG indicators as a basis.
- Incorporate considerations of justice, equity, diversity and inclusion into all our granting programs.

### TARGETS

- 1 Ensure an average annual distribution of funds of \$20M, and reach \$25M in 2026.
- 2 Attain an annual distribution representing between 5 and 7% of the asset total in FGM's funds in 2026.
- 3 Ensure a minimum annual leverage effect of 1 to 2 for our granting programs.
- 4 Launch, or participate in, at least five strategic collaborative initiatives per year.
- 5 By 2026, aim to have at least 50% of grants allocated by FGM distributed to organizations run by individuals from diverse backgrounds, or serving diverse communities.





# FOCUS AREA 3

## Publicize information on issues facing the community

We act as a reference hub, providing spaces for exchange and dialogue on philanthropic and community issues by publishing studies and organizing events, notably in conjunction with the *Vital Signs of Greater Montreal* series of reports. We disseminate knowledge on key issues with a view to strengthening our community's capacity for action. We amplify diverse philanthropic and community voices, so as to serve as a reflection of our environment.



### GOALS

- Make heard a strong and credible voice on issues facing the community, and amplify the voices of community actors.
- Enhance knowledge and comprehension of community issues, so as to stimulate dialogue and guide interventions that will have a major impact.

### LEVERS

- Raise FGM's profile by broadening the reach of all its communications tools.
- Be more present, and make relevant interventions, in the media and in multiple forums, in both languages.
- Increase the frequency of *Vital Signs* publications and work more actively on their dissemination in order to enhance knowledge about the issues facing the community.
- Foster events that promote knowledge sharing, and offer a space for dialogue between philanthropic and community actors, so as to stimulate consensus and collaboration.

### TARGETS

- 1 Track and raise the profile of the Foundation of Greater Montréal vis-à-vis key target populations.
- 2 Reach an annual average of 500,000 impressions per year for all social media combined.
- 3 Get mentioned at least 75 times a year in written and digital media.
- 4 Produce at least one thematic study per year in the *Vital Signs* series, as well as a full edition of *Vital Signs* in 2025.
- 5 Organize five events per year to reach key philanthropic and community partners.



**Join us and improve the  
well-being of Greater Montreal!**

# **FGM is *your* foundation**



Foundation of Greater Montréal

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SUSTAINABLE  
DEVELOPMENT **GOALS**