Plan adopted by the Board of Directors

MISSION
The Foundation of Greater Montréal (FGM) helps individuals, families and organizations get involved to support their community by creating funds for selected causes in all sectors. The FGM manages the funds' assets and guides donors by identifying key issues and supporting the community's most dynamic actors. It also encourages philanthropy as a major driver for well-being in Greater Montréal.

VISION
The FGM is recognized for its strategic and unifying leadership in achieving Sustainable Development Goals (SDGs) via its support for dynamic projects by community organizations and via its focus on innovative initiatives, including for children's well-being in the community.

VALUES
Integrity, excellence, inclusion, listening, innovation.

FOCUS AREA 1 PHILANTHROPY PROMOTION
Objective 1.1 Promote philanthropy and the FGM as a core value and an important tool in our community.
Objective 1.2 Develop efforts to promote government programs aimed at creating funds in various areas (culture, sports, education, health, etc.).
Objective 1.3 Distribute philanthropy information tools and ensure they are available for events and relevant projects.

FOCUS AREA 2 FINANCIAL CAPITAL GROWTH
Objective 2.1 Increase the number of funds, in particular those devoted to sustainable development.
Objective 2.2 Boost the performance of government partnerships in creating funds.

FOCUS AREA 3 NETWORKS OF COLLABORATORS AND TERRITORIAL ENGAGEMENT
Objective 3.1 Increase collaboration with networks of professional advisors.
Objective 3.2 Structure networks of collaboration by engaging fund creators.
Objective 3.3 Establish a network of active local collaborators on the Island of Montreal, the North Shore and the South Shore.

FOCUS AREA 4 RECOGNITION
Objective 4.1: Spotlight the contributions of donors and fund creators.
Objective 4.2: Engage the community via grant programs targeting vital issues.
Objective 4.3: Pursue the project support program via the priority support component and the support for repaying component, in line with sustainable development issues.
Objective 4.4: Develop common objectives and new programs in collaboration with the FGM's funds and foundations.
Objective 4.5: Ensure that greater support is provided fairly, across Greater Montréal, in particular on the two Indigenous communities.

FOCUS AREA 5 EXPERTISE
Objective 5.1: Become a centre of philanthropy expertise.

FOCUS AREA 6 RESOURCES AND DATA
Objective 6.1: Inform the community by publishing data on sustainable development issues in Greater Montréal.
Objective 6.2: Continue to publish Vital Signs reports and other studies on key issues affecting Greater Montréal.

FOCUS AREA 7 GRANT PROGRAMS
Objective 7.1: Engage the community via grant programs targeting vital issues.
Objective 7.2: Pursue the project support program via the priority support component and the support for repaying component, in line with sustainable development issues.
Objective 7.3: Pursue the development of community programs in collaboration with the FGM's funds and foundations.
Objective 7.4: Ensure that greater support is provided fairly, across Greater Montréal, in particular on the two Indigenous communities.

FOCUS AREA 8 PARTNERSHIPS
Objective 8.1: Foster partnerships with community leaders and organizations by focusing on social innovation.
Objective 8.2: Boost project effectiveness by favouring efforts to engage the community in the planning and co-creation processes.

FOCUS AREA 9 DEPLOY FINANCIAL CAPITAL VIA HIGH-ImpACT INVESTMENTS
Objective 9.1: Evaluate the opportunities of deploying financial capital via high-impact investments relating to sustainable development issues. Support initiatives from a sustainable development perspective.
Objective 9.2: Link high-impact investments to the development of projects at the community level.

FOCUS AREA 10 LISTEN TO AND INFLUENCE THE COMMUNITY
Objective 10.1: Engage in periodic consultations with community actors on the FGM’s projects and activities.
Objective 10.2: Inform partners and institutions about community issues.

FOCUS AREA 11 COMMUNICATIONS: STRONG STRATEGIC PRESENCE, PUBLIC TRUST AND REPUTATION
Objective 11.1: Spotlight the impact of investments for sustainable development in the community.
Objective 11.2: Demonstrate the strong strategic presence of the FGM.
Objective 11.3: Promote responsible and effective management of the funds and of FGM processes.

FOCUS AREA 12 INVESTMENT FUND MANAGEMENT
Objective 12.1: Ensure the management of the investment fund with a view to measuring the achievement of objectives in relation to comparable performance standards (e.g. active return, risk, fee turnover rate, etc.).
Objective 12.2: Develop appropriate tools to ensure overall HF management, private banking, personal fund management of the funds and of FD resources and data.
Objective 12.3: Develop the governance of the investment fund.

FOCUS AREA 13 MANAGEMENT OF THE FINANCIAL CAPITAL GROWTH AND EFFECTIVE ORGANIZATION
Objective 13.1: Optimize internal management processes.
Objective 13.2: Optimize financial planning and reporting software adapted to the FGM’s development needs.
Objective 13.3: Establish management tools and adapt them to FGM’s needs.
Objective 13.4: Promote efficiency and effective management of the funds and of FGM processes.
Objective 13.5: Develop appropriate tools to ensure overall HF management, private banking, personal fund management of the funds and of FD resources and data.
Objective 13.6: Adapt the level of human and material resources to the FGM’s needs.

FOCUS AREA 14 GOVERNANCE
Objective 14.1: Adapt the Board’s competency profile to the FGM’s development needs by aiming for greater diversity.
Objective 14.2: Adapt the FGM’s succession plan and internal structure.
Objective 14.3: Using the appropriate tools, regularly engage employee engagement and satisfaction, in addition to the Board’s effectiveness.