

Welcome to the 2018 Manitoba Regional Meeting

October 18, 2018



An initiative of | **THE WINNIPEG FOUNDATION**  Your Community Foundation
For Good. Forever.



Quick Question

- Who here participated in the Manitoba Scholarship and Bursary Building Incentive Program to help grow their scholarship funds and overall community foundation?



Quick Question – Follow -Up

- Who here has at least one museum or archive operating in their community?
- Who here has created an endowment fund for their local museum?



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MANITOBA HERITAGE TRUST PROGRAM

Administered by:



Partners:



Manitoba Heritage Trust Program

- A joint initiative between the Province of Manitoba, The Winnipeg Foundation, the Association of Manitoba Museums, the Association for Manitoba Archives, and you, Manitoba's Community Foundations
 - Focused on building sustainability for our Province's great heritage institutions
 - With up to \$5 million in stretch grants for all new endowments started for qualifying museums and archives created at MB community Foundations
 - And a three (3) year timeline (2018-2021)



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Manitoba Heritage Trust Program

- But who can participate in the Program?
 - How does the Program work?
 - How can Community Foundations get involved?
 - And where can Community Foundations get support?
-
- Those answers and more in today's session



Today's Agenda

- Program Qualifying Manitoba Museums and Archives
- The Program (in general) and its Processes
- The Role of Community Foundations and the Program
- Program Administration and Supports
 - *Helping you Help Others* Fundbuilding Workshop
- Recent Program Developments and Next Steps
- Questions? Welcome at any time



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Program Qualifying Manitoba Museums and Archives



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Qualifying Heritage Participants

Must:

- Be Manitoba-based organizations with a (specific definition):
 - Primary mandate to support the identification, collection, preservation, and interpretation of any artifacts, documentary heritage, designated heritage sites/structures or works of visual art/fine craft, that are of recognized importance to the unique historical development of Manitoba



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Qualifying Participants

Must:

- Be an association providing direct services to heritage organizations;

OR

- Be a museum, including but not limited to, an art museum, that maintains a permanent physical collection



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Qualifying Participants

Must:

- Be an accredited archive, maintaining a permanent collection

OR

- A society or organization that operates an eligible museum, accredited archive, or a site or structure

OR

- A fundraising entity working on behalf of an eligible heritage organization (e.g. Friends of...)



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Qualifying Participants

Must:

- Be a registered charity in good standing with the Canadian Revenue Agency Charities Directorate for a minimum of 1 year

OR

- Be directly affiliated or a subsidiary of a registered charity in good standing for a minimum of 1 year

OR

- Operate as a distinct entity under the authority of a public body or institution (e.g. regional/municipal government, university, or Indigenous governing bodies, etc.)



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Qualifying Participants

Must:

- Maintain a website or discoverable internet presence
- Agree to have their Heritage Trust Fund linked to the Endow Manitoba website operated by The Winnipeg Foundation



Disqualifying Participants – i.e. Exclusions

Must not:

- Be organizations dedicated to biological or ecological conservation (e.g. zoological societies, conservation districts, arboretums etc.)
- Have only virtual, online or purely digital collections
- Be national organizations or their regional operations (unless based in Manitoba)
- Be art galleries not acting primarily as a museum
- Have an annual fiscal budget for operations exceeding \$2 million



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The Program (in general) and its Processes



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The Program (in General)

- Supports qualifying Manitoba Heritage Institutions in establishing sustainable funding through endowments
- Major Program Process steps involve:
 1. Qualify through an Application
 2. Complete the Funding Agreement
 3. Launch the Heritage Trust Fund
 4. Leverage the Matching Funds
 5. Return Money to your Community



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Program Processes

1. Qualify through Application

- Support local museums and archives to apply
 - Complete the Manitoba Heritage Trust Program application form available on Endow Manitoba website www.endowmanitoba.ca/manitoba-heritage-trust-program/
- Organizations will be notified of their program qualification within 10 working days of their application



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Program Processes

2. Establish Funding Agreement

- Once a Heritage Institution is qualified, they must work with a Manitoba community foundation (CF) who is a member of Community Foundations of Canada to:
- Enter into a 3-way funding agreement with The Winnipeg Foundation
 - This agreement will evolve into a standard designated agreement between the CF and the Heritage Institution at the close of the 3-year Program



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Program Processes

3. Launch the Heritage Trust Fund

Once the Funding Agreement has been established, the Heritage Institution must:

- **Obtain a minimum \$2,500 to deposit in order to launch their Heritage Trust Fund**



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Program Processes

4. Leverage the Matching Funds

Once the Heritage Trust Fund is launched, the CF and qualifying museum/archive can begin to grow it through **Eligible** gifts:

- Deposited into Heritage Trust Fund from April 1, 2018 to March 31, 2021
- All gifts must be received and receipted by The Winnipeg Foundation



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Program Processes

4. Leverage the Matching Funds

Examples of gift types:

- Cheques (payable to The Winnipeg Foundation) and/or cash
- Credit cards transactions (through Endow Manitoba); can set up automatic payments (Ie pledges)
- Publicly-traded shares
- Fundraising activities (net proceeds)
- Organizational membership dues



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Program Processes

4. Leverage the Matching Funds

Non-Eligible Gifts:

- Gifts in Kind such as artifacts
- Gifts derived from government sources (Federal, Provincial or Municipal)
- Capitalization of the spending generated from the MHTP Fund
- Gifts received or raised before April 1, 2018 (e.g. reserve accounts)



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Program Processes

4. Leverage the Matching Funds

Matching Highlights

- All eligible gifts received from April 1, 2018 to March 31, 2021 to a maximum of \$50,000, will be guaranteed one dollar for every two dollars raised
- The stretch dollars will be applied to a maximum of \$25,000 per Heritage Fund



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Program Processes

4. Leverage the Matching Funds

Matching Highlights

- If there are funds still available in the program at the end of the three years, there are two ways you can access them:

Additional Match:

- Your next \$100,000 raised would receive an additional stretch of one dollar for every two dollars raised, to a maximum of \$50,000
- **OR** if there is not enough available for this stretch, the balance will be distributed on a pro-rated basis



Program Processes

4. Leverage the Matching Funds

Matching Highlights

At the end of three years, and after the additional stretch has been applied, if program funds are still available:

- Eligible gifts over \$150,000 will qualify for a maximum bonus stretch of \$10,000 (or pro-rated, based on balance of funds still available)
- **Note:** No heritage organization shall receive more than \$85,000 total in stretch dollars through the program



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Administrative Details

- During the three years funds held at The Winnipeg Foundation
- Spending rate will be at 4.0 %
- Administration fees charged by The Winnipeg Foundation- 0.5% administration and actual investment fee of approx 0.35%
- Community Foundations will receive 0.5% administrative fee to recover costs
- Access to on line monthly fund statements
- Endow Manitoba Website resources for MHTP material and supports for both CF and heritage entity



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Program Process

5. Return Money to your Community

Real Life Example 1

- Raise \$10,000 in total for the endowment
- Receive an additional stretch of \$5,000
- Apply the spending policy rate of 4%

Generates \$600/year

For your local Heritage Institution



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Program Process

5. Return Money to your Community

Real Life Example 2

- Raise \$25,000 in total for the endowment
- Receive an additional stretch of \$12,500
- Apply the spending policy rate of 4%

Generates \$1,500/year

For your local Heritage Institution



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Program Process

5. Return Money to your Community

Real Life Example 3

- Raise \$50,000 in total for the endowment
- Receive an additional stretch of \$25,000
- Apply the spending policy rate of 4%

Generates \$3,000/year

For your local Heritage Institution



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Program Process

POP Quiz!!

- How many years will it take to return that initial \$10K raised back into your community? (Hint: You'll be returning \$600/year)
- What happens after year X?
- How long will this last?



The Role of Community Foundations and the Program



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Manitoba's Community Foundations

Our Role in the Community: Many Possibilities

- Supporting diverse charitable organizations [?]
- Promoting and encouraging philanthropy [?]
- Providing leadership to community initiatives [?]
- Promoting and encouraging volunteerism [?]
- Identifying barriers to community vitality [?]
- Establishing partnerships and collaborations [?]



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Manitoba's Community Foundations

Our Role in the Community: Traditional Priorities

- Supporting diverse charitable organizations [✓]
- Promoting and encouraging philanthropy [✓]
- Provides leadership to community initiatives []
- Promoting and encouraging volunteerism []
- Identifies barriers to community vitality []
- Establishes partnerships and collaborations []

From the beginning, CFs have been known for their role in engaging donors to support local charities.



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Manitoba's Community Foundations

Our Role in the Community: Evolving Priorities

- Supporting diverse charitable organizations []
- Promoting and encouraging philanthropy []
- Provides leadership to community initiatives [✓]
- Promoting and encouraging volunteerism [✓]
- Identifies barriers to community vitality [✓]
- Establishes partnerships and collaborations [✓]

As the Community Foundation movement grows, there are greater roles we can play in our local communities.



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Manitoba's Community Foundations

POP Quiz!!

In relation to the Manitoba Heritage Trust Program, what role(s) can local Community Foundations play?



Manitoba's Community Foundations

ANSWER!!

Our Role in the Community: MHTP

- Supporting diverse charitable organizations [✓]
- Promoting and encouraging philanthropy [✓]
- Provides leadership to community initiatives [✓]
- Promoting and encouraging volunteerism [✓]
- Identifies barriers to community vitality [✓]
- Establishes partnerships and collaborations [✓]



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Manitoba's Community Foundations

Call to Action

- Like the matching scholarship program of the 2000s, MHTP is providing CFs across Manitoba an opportunity to play a significant role in helping to maintain their communities:
 - Identity and culture
 - Past and traditions
 - Future
- Let's build on these current opportunities to ensure future ones



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Program Administration and Supports



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Program Administration

Endow Manitoba

- The Winnipeg Foundation recently announced a dedicated department to support community foundations across Manitoba
 - A key priority for the next 3 years will be the administrative and management of the MHTP



Program Supports

But there is more...

- A benefit to the MHTP's collaborative approach is our ability to draw on and leverage existing expertise through our relationships with:
 - The Province of Manitoba
 - The Association of Manitoba Museums
 - The Association of Manitoba Archives
 - The Winnipeg Foundation



Program Supports

Helping you help others...

- To provide you with a working example of how we can leverage our combined resources to ensure this initiatives success, please welcome

Mary Beth Taylor

- Who will be talking to you about how to support your local Heritage Institutions in meeting their funding goals for this program



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Recent Program Developments and Next Steps



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Recent Developments

Since Launching in April 2018

- **27 Heritage Institutions** have already applied to join the program
- **20 Funds** have already been created
 - Over **\$150K** raised
 - Over **\$75K** added through stretch matching
- We are gathering momentum
 - But the clock is ticking...



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Next Steps

Over the Next six months

- Endow Manitoba staff will continue
 - Bringing awareness of this opportunity to both Community Foundations and Heritage Institutions alike
 - Providing administrative support, developing additional program materials, and facilitating partnerships
- As Community Foundations, we invite you to reach out to your local Heritage Institutions and encourage their involvement in the MHTP
 - **Remember:** You are the experts at endowments and leaders within your community, they may look to you for guidance and support



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Next Steps

The Future

- For more information on the program (and resources), please visit:
 - www.endowmanitoba.ca/manitoba-heritage-trust-program/
- Endow Manitoba will continue to provide routine updates as this exciting opportunity unfolds!
- Any further Questions?



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Thank you!

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