

THE COMMUNITY  
FOUNDATION  
OF ORILLIA AND AREA

## Annual Report 2025



*In Memory of John L. Hunter*





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## **Message from the Chairman of the Board**

In 2025, the Community Foundation of Orillia had a very solid year. Thanks to our incredibly lean and simple organization – as a result of our administration contract with the CDC – and our financial model that does not require any fundraising for operating costs, we were able to focus on our core activities of building, investing and granting our charitable endowment funds.

In the area of building our endowment funds, we worked with our existing fundholders, strong local charities and philanthropic donors to attract almost \$1.3 million in new funds! This growth included additions to our existing Donor Directed, Managed and Designated Funds and 3 new funds. As of the end of 2025, our portfolio is over \$27.3 million! Going forward, we will continue to work actively with local charities, professional advisors and donors to continue our strong record of growth.

In the management of our existing funds, we continue to have a strong working relationship with our primary investment managers Connor, Clark & Lunn and our core endowment fund portfolio generated a net return of 10.2% in 2025 during a great year for the markets. We maintained our successful alternate investment management agreements with Karen O'Coin and Scott Walker at BMO Nesbitt Burns to manage the W. Scott & Jean Tudhope Fund and with Brandon Hune at RBC Dominion Securities to manage the Dale Family Fund.

On the granting front in 2025, we granted over \$648,000 to over 50 local charities. That brings our total granting since 1999 to over \$4.25 million to more than 150 local charities. These grants help charities to deliver the critical services they provide to our community. In addition to granting from our endowment funds, we were fortunate in 2025 to receive a \$10,000 donation in December from our investment managers Connor, Clark & Lunn that we granted directly to local charities that help those in need over the holiday season.

It is critical to remember that the CFOA is not a front-line charity delivering service to the community. We are an intermediary and enabler. We connect donors with a desire to give back to our community over the very long term with charities in our community that are doing critical work and need financial support.

Finally, a big thank you to all of the members of the Community Foundation Board of Directors and other community members who have volunteered their time and effort to make all of this good work possible.

Michael Gordon

Chair, CFOA Board of Directors



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## **The 2025-26 Board of Directors**

Michael Gordon, President  
Chris Hazel, Vice-President  
Chris Holtved, Treasurer  
Jim Dykes  
Jodi Lloyd  
Douglas Varty  
Trevor Walker  
Bruce Waite  
Kathy Webb

In addition to our Board of Directors, the following individuals merit special recognition as volunteer committee members.

## **CFOA Committees**

### **Asset Development**

Michael Gordon: Chair  
Kellie Beasley  
Jim Dykes  
Chris Hazel  
Paul Taylor  
Douglas Varty  
Bruce Waite

### **Investment**

Chris Hazel: Chair  
Michael Gordon  
Tom Jarvis  
Glenn Meeuwisse

### **Community Grants**

Trevor Walker: Chair  
Don Haskins  
Jodi Lloyd  
Kathy Webb  
Peter Dale  
Carol Benedetti

## **Professional Management**

### **Investment Management**

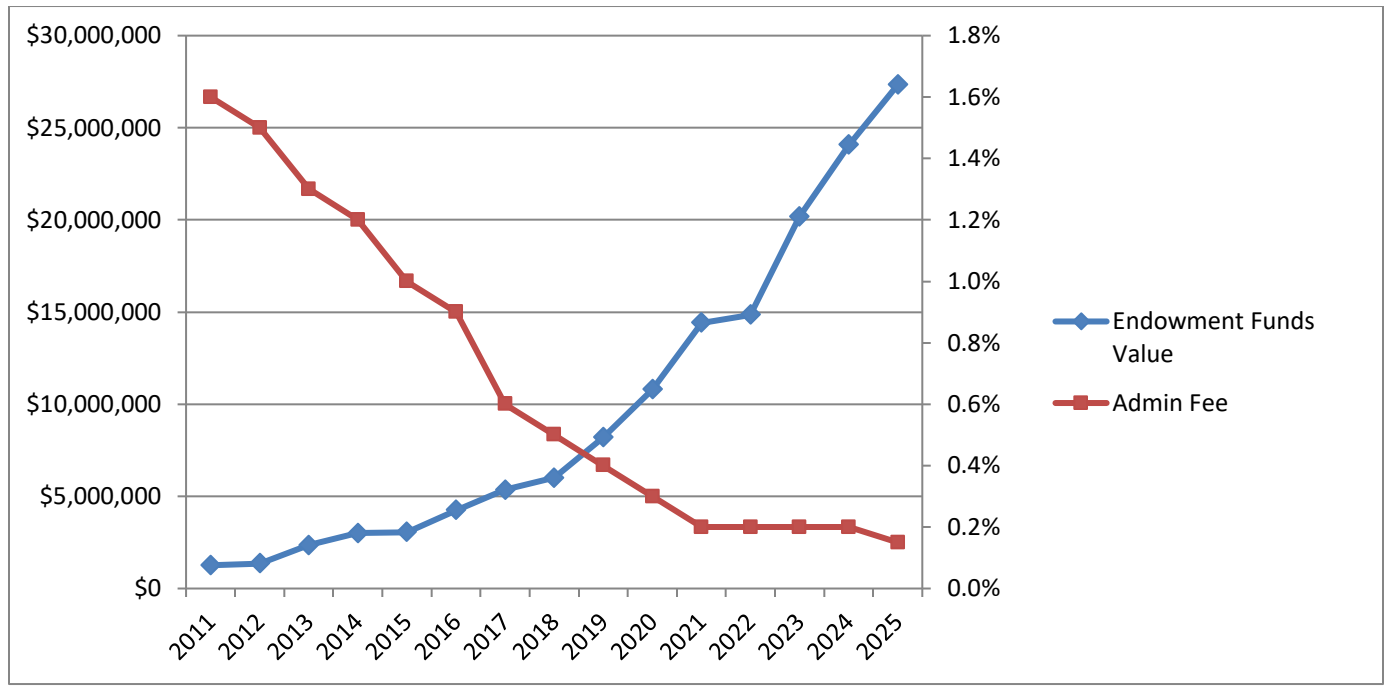
Connor, Clark & Lunn  
BMO Nesbitt Burns  
RBC Dominion Securities

### **Administration**

Orillia Area Community Development Corp.

### **Auditor**

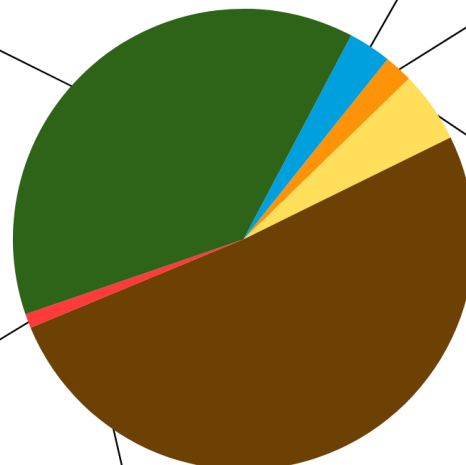
Hehn Trickey Professional Corporation



**Managed Funds**

- Mariposa Folk Festival
- Couchiching Conservancy
- Orillia Museum of Art & History
- 99 Lynx Squadron Air Cadets
- The Orillia Fish and Game C. C.
- Orillia Shriners
- St. Paul's
- Magnetawan Land Trust
- Orillia Minor Hockey
- Rainy Lake Conservancy
- Huronia Community Foundation
- Helping Hands

**Smart & Caring Community Fund**



**Field of Interest Funds**

- Patti Cox Childrens
- Patti Cox Seniors
- Ontario Endowment for Children & Youth in Recreation
- Casino Rama Festive

**Designated Funds**

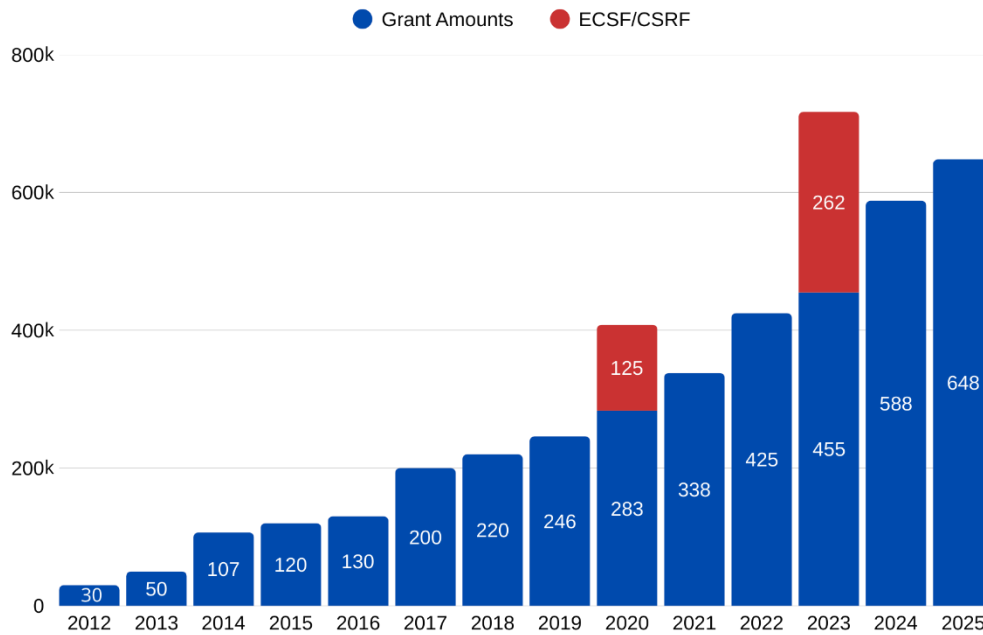
- YMCA Skid Watson
- OSMH Foundation
- Couchiching Conservancy
- Volunteer Firefighters Disaster Relief
- North Simcoe Victim Services ~ founded by Carol Ivey
- Orillia Vocal Ensemble
- Big Brothers Big Sisters
- Orillia Museum of Art & History
- St. Paul's
- The Sharing Place
- Orillia Fish & Games C. C.
- Stephen Leacock Associates
- Orillia Youth Centre
- The Lighthouse
- Mariposa House Hospice
- North Simcoe 4H Club
- Helping Hands

**Scholarship Funds**

- Orillia Y's Men
- Apprenticeship Bursary - Fletcher
- Tom Parish
- Larsen Family
- Sud Sutherland Music Award

**Donor Directed Funds**

- W. Scott & Jean Tudhope
- John L. Hunter
- Dale Family
- Brian Adams
- Jim & Ruth Watt
- Jarvis Family
- Dykes Family
- Varty Family
- Annalynn Faulkner
- Bill Swinimer Family
- Webster Family



**Granting in 2025**

Since 1999, the Community Foundation has granted more than \$4,250,000 to over 150 organizations in our community including the following organizations in the past year:

- |  |                                       |
|--|---------------------------------------|
| Alzheimer Society                            | OELC                                  |
| Big Brothers Big Sisters                     | Ontario SPCA                          |
| Born to Read                                 | Orillia Central Preschool             |
| Bridget's Bunnies Pregnancy and Infant Loss  | Orillia Concert Band                  |
| Calvary Community Church                     | Orillia Fish & Game Conservation Club |
| Campfire Circle Muskoka                      | Orillia Museum of Art & History       |
| Canadian Guide Dogs for the Blind            | Orillia Public Library                |
| Canadian Red Cross Society                   | Orillia SPCA                          |
| Child Advocacy Centre                        | Orillia Vocal Ensemble                |
| CNIB   | Orillia Youth Centre                  |
| Couchiching Conservancy                      | OSMH Foundation                       |
| Couchiching Jubilee House                    | Parkinsons Canada                     |
| Georgian College                             | Rainbows for All Children Canada      |
| Gilda's Club                                 | Ramara Township Public Library        |
| Green Haven                                  | Salvation Army                        |
| Helping Hands                                | Scientists in School                  |
| Hill House Hospice                           | Seasons Centre for grieving children  |
| Hillcrest Lodge                              | Sharing Place Food Centre             |
| Hospice Orillia                              | Simcoe County District School Board   |
| I Challenge Diabetes                         | Simcoe Muskoka Family Connexions      |
| Independent Living Services                  | Socks for Souls                       |
| Information Orillia                          | St Andrew's Presbyterian Church       |
| Kiwanis Club of Orillia                      | STEM Camp Foundation                  |
| Lakehead University                          | St Paul's Centre                      |
| Lighthouse (Orillia Christian Centre)        | St Vincent de Paul                    |
| Mariposa House Hospice                       | Toronto Humane Society                |
| Nature Conservancy of Canada                 | Trillium Manor                        |
| North Simcoe 4H Club                         | World Vision                          |
| North Simcoe Hospice Palliative Care Network | YMCA                                  |
| North Simcoe Victim Crisis Services          |                                       |



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*A locally run, public foundation that builds and manages permanent endowment funds from charitable donations, and grants the income each year to local charities, based on their need and the need of the community.*

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**www.communityfoundationorillia.ca**