



**THE COMMUNITY  
FOUNDATION**  
OF ORILLIA & AREA  
*A Caring Community...Forever*

# **1999 Annual Report**

**Our 1st Year Report to our  
Community**



# A MESSAGE FROM OUR CHAIR

Donna Hewitt

*The Community Foundations movement is continuing to sweep across our country. Within the last year alone nearly twenty new foundations have sprung up in communities just like our own! And it's not surprising. Community foundations are quickly being recognized and valued for their ability to build and strengthen their own home communities.*

*Community Foundations play an important role in the health of a community. Their purpose is really three-fold. First, a community foundation provides a safe, well-managed venue through which donors can make charitable contributions that will grow in perpetuity to meet the ever changing needs of the community. Second, grants are made available annually from the earnings of the endowment funds to address the needs of the community – this could include everything from health to education to social services to arts and culture to the environment. And finally, a community foundation has a responsibility to provide leadership to its community. This leadership often takes the form of impartial facilitation and co-ordination of individuals and organizations who share common objectives and interest. Through co-operation these like-minded individuals can achieve much more collectively for the betterment of their community.*

*The inaugural year for the Community Foundation of Orillia & Area has been nothing short of magical and awe inspiring. Spurred on by the challenges of Casino Rama and the City of Orillia, within 12 short months our community has rallied together. In an unprecedented fashion, we have developed a community foundation with endowed funds in excess of \$575,000. Our efforts, vision and ability to motivate and organize within our community did not go unnoticed amongst the community foundations movement nationally. Our Foundation was asked to sit on a provincial task force which formulated and advised on the development of the Ontario Endowment for Children and Youth in Recreation Fund which was ultimately announced by the Minister of Citizenship, Culture and Recreation late in December 1999.*

*While the need to continue to grow our endowment funds is still there, the focus for your community foundation for the next year and into the future will begin to shift towards our responsibilities around grant making and community leadership. We are all working very hard to develop a grant making strategy which will be fair and accountable and will address the needs of our community. We are looking forward to seeing the proceeds from your monies at work within our area. On the leadership side we will be devoting volunteer and staff time within the community as we all work towards making our community an even better place to live, work and play.*

## AN EXCITING FIRST YEAR

Executive Director, Deborah Wagner

*This is a story about vision, heart, compassion, leadership, and support. This is a story about a community taking the initial steps to look after itself for years to come. This is a story about the citizens of Orillia & Area. Although brought to life by one individual, Jim Dykes, the success of the first year of The Community Foundation belongs not only to the 29 volunteers that represents the Foundation's Board of Directors and Committee Members, but to the members of our community that have supported the concept over the past year.*

*This support was evident by the energy, time and commitment of those who hosted events on behalf of the Foundation, who provided merchandise fundraising opportunities, volunteered for special events, provided material and service in kind, and those who listened to the story of community foundations. Of course, most importantly were the donors of the Foundation, from the smallest to the largest, all making a tremendous impact on our future generations. To the generosity of Casino Rama, the foresight of The City of Orillia, and the show of faith from Georgian College's Community Advisory Group, history was being written. One year after the Launch, there is now almost \$580,000 in endowed funds working on behalf of our community ... forever.*

*1999 was truly a remarkable year. The real satisfaction, however, will come when the first series of grants are issued in 2000. That's when we will witness the fruits of our labour and enjoy the benefits of a community foundation.*

*As remarkable as 1999 was, we are fast on our way to making 2000 another year of outstanding accomplishments. The goal of our Asset Development Committee is to raise another \$420,000 bringing the endowed funds to a total of \$1 million by year-end. The recent announcement by the Minister of Citizenship, Culture and Recreation regarding the matching grants for the Endowment Fund for Ontario's Children & Youth in Recreation could play a major role in raising those funds. The allocation for Orillia & Area is matching funds up to \$200,000, giving the potential for a \$400,000 endowment fund strictly focused on youth recreation and culture programs. Please join us in 2000 by supporting your Community Foundation!*

# TYPES OF FUNDS

In support of our primary role as an endowment organization, The Community Foundation seeks to facilitate charitable giving in accordance with the donors' personal, financial, and philanthropic objectives. In this regard, we work with donors and their advisors to develop gifting strategies and to offer a variety of Fund options to suit different personal and philanthropic objectives.

The following is a summary of the Funds to which donors may direct their contributions.

## **THE COMMUNITY UNRESRICTED ENDOWMENT FUND**

This important Fund allocates flexibility in matching a donor's philanthropic priorities with Our Community's needs. The Community Endowment Fund enables the Foundation to respond quickly to the areas of urgency within our community. The income is distributed in the form of grants recommended by the Grants Committee and approved by the Board of Directors, in response to applications received from various community organizations.

## **ONTARIO ENDOWMENT FOR CHILDREN AND YOUTH IN RECREATION FUND**

The Community Foundation of Orillia & Area in partnership with the Province of Ontario offers an exciting new way for donors to double their giving and double their impact on the youth and families in our community.

From now until March 2002, donations to the new Ontario Endowment for Children and Youth in Recreation Fund will be matched dollar for dollar by the provincial government, specifically the Ontario Ministry of Citizenship, Culture and Recreation, up to a maximum of \$200,000.

## **SIMCOE COLLEGE SCHOLARSHIP & BURSARY AWARD FUND**

Awarded to enhance higher education opportunities and to increase access to Georgian College programs for students from Orillia and Area.

## **TOM PARISH SCHOLARSHIP FUND**

Scholarship given annually to an Orillia high school graduate who will be attending a college or university to continue studies in either business or the environment, in memory of the late Tom Parish.

## **COMMUNITY FOUNDATION ADMINISTRATION FUND**

An endowment fund to support the operating and administration of The Community Foundation of Orillia & Area in perpetuity.

## **DONOR ADVISED FUNDS**

The benefactor, benefactor's family, or designates recommend annually to the Board of Directors which charitable organizations should receive the income from the Fund.

## **DESIGNATED FUNDS**

Grants are made to those charitable organizations specified at the time the Fund is established.

## **FIELD OF INTEREST FUNDS**

Funds established by the community foundation to attract contributions for a particular area, e.g. children, education, the arts, or a geographic location, without limitation to a specific organization or beneficiary.

## **NAMED FUNDS**

Fund established by, or named for, an individual, family, corporation or other group to carry out the charitable interests of the donor(s) or deceased/honoree.

For more information on these Funds, call the Foundation Office at 705-325-4903.

# 1999 FINANCIAL HIGHLIGHTS

Year Ended December 31, 1999

	OPERATING ACCOUNT
<b>Revenue</b>	
Donations	\$75,300
Special Events	4,720
Interest	<u>1,468</u>
	\$81,488
<b>Expenses</b>	
Administration	\$33,796
Promotion	7,994
Leadership Programs	<u>2,643</u>
	\$44,433
<b>Operating balance, end of year</b>	<b><u>\$37,055</u></b>

The Operating Account reports resources available for the Foundation's general operating activities including initial launch, asset development, grant making, communications and marketing and community leadership projects. The general costs of supporting these activities are reported in the expenses of the account. A portion of donations received later in 1999 were directed for 2000 operating costs.

## ENDOWED FUND BALANCES AS AT DECEMBER 31, 1999

Community Unrestricted Endowment Fund	\$358,050
Tom Parish Scholarship Fund	12,000
Simcoe College Scholarship & Bursary Award Fund	50,000
Community Foundation Administration Endowment Fund	<u>1,700</u>
<b>TOTAL ENDOWMENT FUNDS</b>	<b><u>\$421,750</u></b>

The Foundation auditors are Grant Thornton. Audited financial statements are available on request from the Foundation Office.

### Charitable Receipts

The Foundation is a registered charity (Reg. Charitable No. 86803 8951 RR0001) and donations are eligible for an income tax receipt.

# OUR DONORS

The Community Foundation of Orillia & Area recognizes the following donors as *Pioneers of the Foundation*, acknowledging their support in 1999, our founding year.

## Community Unrestricted Endowment Fund

### LEADERS

Casino Rama  
City of Orillia

### PARTNER

L. Tucker Building Supplies Limited

### BUILDERS

John R. Hurl  
Mundell Funeral Home  
Orillia & District Chamber of Commerce

### BENEFACTORS

AIM Funds Management  
Brewery Bay Food Company  
Century 21 Don Campbell Real Estate  
Dick Paterson Pontiac Buick Cadillac  
Douglas Gardiner  
Jim Wilson Chevrolet Oldsmobile  
Orillia Dodge Chrysler Inc.  
Thor Motors

### FRIENDS

703635 Ontario Inc. o/a Autosport Orillia  
AGF Group of Funds  
AIC Limited  
Atlas Funds  
C.I. Mutual Funds  
Carol A. Ivey  
Community Development Corporation  
D. Campbell  
Dalt's Honda  
Davenport Motors  
Deborah Wagner  
Donna Hewitt  
Dundee Investment Management  
E. Cameron Maltby  
Edward Konda  
Elliott & Page Mutual Funds  
Fidelity Investments  
Garfield Dunlop  
Global Strategy Investment Funds  
Gord Marsh  
Guardian Group of Friends

## Community Unrestricted Endowment Fund (Cont'd)

Helen Perry  
Ian Brown  
Joan Holt  
Judith McCulloch  
Kimberly Dawson  
KFW Canada  
Mary Lou Kirby  
Mary Showers  
Michele Hall  
Monika Maizis  
Orillia Martial Arts  
Patsy-Anne Campbell  
Paul & Linda Engeland  
Paul Spears  
Quota Club of Orillia Inc.  
RBC Dominion Securities  
Ross Ferguson  
Simcoe County Chrysler  
Simcoe-Matic Canteen  
Simcoe Mazda  
Spectrum United  
Talvest Fund Management  
Valle Shell

## Simcoe College Scholarship & Bursary Award Fund

### PATRON

Georgian College

## Tom Parish Scholarship Fund

### BENEFACTORS

David G. Beaton  
GLH Holdings Limited

### FRIENDS

911256 Ontario Inc.  
Apple Auto Glass  
Aubrey J.F. Ford & Associate  
Barbara & Alan Watt  
Brewery Bay Food Company  
Browne's Esso  
Chaywood Holdings Ltd.  
Clayton French  
Dave Beckett  
Dick Paterson Pontiac Buick Cadillac

## FOUNDERS CIRCLE

## Tom Parish Scholarship Fund (Cont'd)

Doner Developments Limited  
Dr. Michael Tangnay  
Ed Holcomb  
Edwin Emond  
J. Alex Wilson  
James D. Dearden  
James L. Graham  
James E. Bieser  
June Parish  
Michael Monteith Enterprises Limited  
Neville Monteith  
Nor-Weld Ltd.  
Simcoe-Matic Canteen  
Steve Rickard  
Victor & Winifred Rolt  
Victor Lockerbie  
Victoria & Ron Cescon

## Foundation Administration Endowment Fund

### BENEFACTOR

Scott Showers

### FRIEND

Donna Hewitt  
Simcoe-Matic Canteen

## Operating & Administration

### LEADER

Casino Rama

### BUILDER

Community Foundations of Canada

### FRIEND

Bob Brown

## Memorial Donations

*In Memory of:*

Eileen Greenhalgh  
Grace M. Marshall  
Helen Neufeld  
Sheila Collins

LEADER Over \$100,000  
CHAMPION 100,000

PATRON \$50,000  
PARTNER 10,000

BUILDER \$5,000  
BENEFACTOR 1,000  
FRIEND Under 1,000

## MANY THANKS TO OUR GENEROUS SUPPORTERS

*BDO Dunwoody*

*Brewery Bay Oldtimers'  
Hockey*

*Casino Rama*

*City of Orillia*

*Community Development  
Corp.*

*Community Foundations of  
Canada*

*Epix Design*

*EZ Rock 105.9*

*Aubrey Ford*

*Georgian College*

*Samantha Jarvis*

*Champlain Golden "K"*

*Kiwanis Club*

*Pete McGarvey*

*Merge Business Equipment*

*Orillia & District Chamber of  
Commerce*

*Overview Advertising Studio*

*The Packet & Times*

*Parks & Recreation, City of  
Orillia*

*Quota Club of Orillia Inc.*

*RBC Dominion Securities*

*Rose Printing*

*Jack Stewart*

*Shaw Cable*

*R. Bruce Waite*

*Grant Thornton Chartered  
Accountants*

*Volunteer Resources*

## AND TO OUR SPECIAL EVENTS VOLUNTEERS

Harry Barons  
Rene Bernier  
Harold Crosson  
Carrie Dunn  
Gina Hardy  
Al Hockin  
Suzanne Lanois  
Maureen McQuillan  
Ron Nicholson  
Colette Peddle  
Suzanne Prosser  
Patrick Richard

Michelle Bernier  
Bill Bragg  
Bruce Crowther  
Scott Hammond  
Joanne Harrigan  
Christine Jarvis  
Jan Maskery  
Tracy Monks  
Ralph Noy  
Bill Price  
Lois Quinn  
Janis Todd



**Our  
Millennium**

MAKE YOUR MARK MAKE A DIFFERENCE

Our Millennium is a national program inviting Canadians to mark the millennium by coming together and doing something special for their communities. Hundreds of thousands of Canadians have already joined in. Groups large and small - families, friends, school children, workplaces, entire communities -- are giving gifts of time, energy, creativity, commitment and support.

For information on Canada's Community Foundations initiative call:

The Our Millennium Program  
The Community Foundation  
of Orillia & Area  
(705) 325-4903

Visit the national website at [www.ourmillennium.ca](http://www.ourmillennium.ca) to see who from our area has registered their project



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