



THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA



2010 Annual Report





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Motto

Strengthening our Community!

Vision

The Community Foundation of Orillia and Area is a vital community asset: a public foundation created by and for the people of our community. We work with private donors, service clubs, businesses, and charitable organizations to stimulate charitable giving, establish permanent endowment funds, and support initiatives which make an ongoing difference and enhance the quality of life in our community.

Mission

The mission of the Community Foundation of Orillia and Area is to facilitate and stimulate giving in order to build a strong and caring community in which to live, work, and play by:

- Developing and maintaining permanent endowment funds through responsible stewardship
- Assessing and responding to existing, emerging, and changing community needs
- Providing a means for individuals and organizations with varied interests and levels of giving who want to contribute back to their community both during and after their lifetime
- Demonstrating leadership by forming, encouraging, supporting, and educating individuals, community groups, service clubs, foundations, professional advisors, businesses, government, the media and others

Core Values

Integrity – Accountability -- Community Leadership – Stewardship - Professionalism

Professional Management

Investment Management
Connor, Clarke & Lunn

Auditor
Ben T. Cole Professional Corporation



MESSAGE FROM THE CHAIR AND EXECUTIVE DIRECTOR

2010 was a challenging year for the Community Foundation of Orillia and Area. Wendy Timpano, our Executive Director, and Leah Wuttke, our fundraiser, had worked together to launch a variety of projects. However, the funding for Leah's position ended early in the summer, and shortly after that, Wendy made a strategic career move.

Nonetheless, the 5th year of the Dragon Boat Festival ran smoothly, and everyone had a wonderful, fun-filled day. The Festival continues to showcase our Foundation's profile as a leader in the not-for-profit community.

Our new Executive Director, Marilyn de Lang, landed in her new role with both feet running and hasn't stopped since. We hosted our first Subaru Ski Day in January, with proceeds going to our Foundation, and we received the welcome word that "YES" the Snowbirds would love to return for another air show in 2012, with the Community Foundation of Orillia and Area as sponsor.

We are pleased that we were able to grant over \$40,000 to local charities in Orillia, Severn, Ramara, and Oro-Medonte in 2010. We are also excited to add the Our Ramara Fund to our endowments.

Looking ahead, our goals are to continue to support local charities through planned giving initiatives and to raise money for our administrative fund so that we can continue to be self-sufficient. We have a strong Board of Directors with varied talents and assets which will ensure our continued success.

- Darlene Elder, Chair, Board of Directors



The past year was a time of change for the Foundation, beginning with the position of Executive Director! Mid-year, Wendy Timpano accepted a management post at the Community Development Corporation, and her loss was keenly felt. Lisa Earl stepped in as Interim E.D., making the 5th annual Dragon Boat Festival a great success, raising over \$50,000 for charity. Many thanks to these hard-working and committed women!

I joined the Foundation in November and therefore relay some highlights of the year with second-hand knowledge, but with enthusiasm. My first responsibility was to coordinate the 2nd annual 'Random Act of Kindness Day'. It was inspiring to see the celebration of simple gestures of goodness, and I look forward to the 3rd 'Kindness Day' this year.

Grant-making is a pleasure, and I thoroughly enjoyed the fall grants presentation! Another rewarding task was finalizing the new 'Our Ramara Endowment Fund', serving charitable activities in Ramara Township.



In December, volunteers and staff from the four Community Foundations in Simcoe County accepted a grant from the Trillium Foundation to work together to streamline the marketing and the administrative functions of our organizations: a very exciting initiative!

Dundee Wealth continued to generously provide the Foundation with an office: I truly appreciate their kindness and support!

I welcome the challenges and rewards ahead, as I work with the Board, committees, volunteers, donors, sponsors, and community partners to support the valuable work of the Community Foundation.

- Marilyn de Lang, Executive Director



Community Unrestricted Fund

Big Brothers/Sisters of Orillia & District	\$ 1,000
Boys & Girls Clubs of North Simcoe	\$ 2,000
Coldwater Canadiana Heritage Museum	\$ 311
Couchiching Jubilee House	\$ 1,000
Elizabeth Fry Society	\$ 1,600
Information Orillia	\$ 700
Orillia & District Arts Council	\$ 1,000
Orillia Silver Band	\$ 500
Sharing Place Food Bank	\$ 2,000
St. George's Church (Coldwater)	\$ 1,000
St. Vincent DePaul Society	\$ 3,990
Telecare Orillia	\$ 2,000

Carol Ivey Victim Crisis Services Fund

North Simcoe Victim Crisis Services	\$ 330
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Casino Rama Festive Fund

St. Vincent DePaul Society	\$ 500
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Ontario Endowment for Children & Youth in Recreation Fund

New Path Foundation, Common Roof	\$ 550
Orillia & District Arts Council	\$ 1,000
St. Vincent DePaul Society	\$ 500
Washago Community Centre	\$ 550

Orillia Soldier's Memorial Hospital Fund

Orillia & Area Physician Recruitment	\$ 4,000
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Orillia Y's Men's Scholarship

Paige Sillaby	\$ 335
Benjamin Lloyd	\$ 335
Alexandra Clarke	\$ 335
Megan Fricker	\$ 335

Patti Cox Memorial Children's Fund

Orillia Silver Band	\$ 1,790
Orillia Youth Centre	\$ 3,050

Patti Cox Memorial Seniors' Fund

St. Columbkille Roman Catholic Church	\$ 3,000
Washago Community Centre	\$ 1,840

Simcoe College Scholarship & Bursary Award Fund

Brooke Maw	\$ 1,800
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Skid Watson YMCA Endowment Fund: Orillia YMCA	\$ 2,100
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They Had a Dream Fund: Community Foundation of Orillia	\$ 312
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Tom Parish Scholarship Fund: Eliza Jackson	\$ 500
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Trails for Life: City of Orillia, Trails for Life Committee	\$ 300
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These funds grow the revenue that enables the Foundation to grant to the community:

The Community Unrestricted Endowment Fund

The Community Endowment Fund enables the Foundation to respond to 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.

Apprenticeship Bursary Fund

This is a scholarship fund in memory of the late Bob Fletcher, which will be awarded in support of a local second- or third-year apprentice.

Carol Ivey Victim Crisis Service Fund

This fund, established by Carol Ivey, provides an annual gift to support the ongoing operating and administration costs for North Simcoe Victim Crisis Services.

Casino Rama Festive Fund

This endowment fund was established by the CREW at Casino Rama to help local non-profit groups assist the less fortunate during the festive season.

Couchiching Conservancy Land Stewardship Endowment Fund

This stewardship fund has been created to help the Couchiching Conservancy care for important lands in our area. The fund provides the financial support that is needed to protect and preserve these lands on an ongoing basis.

Orillia Soldiers Memorial Hospital Foundation Doctor Recruitment Endowment Fund

This endowment fund is used to assist community groups in attracting doctors to establish their practices in the Orillia area.

Ontario Endowment For Children And Youth In Recreation Fund

In partnership with the Province of Ontario, we established this fund to provide a stable, ongoing source of funding to address the recreational and cultural needs of young people.

Orillia Volunteer Firefighters Community Disaster Relief Fund

This fund, created by the Orillia Volunteer Firefighters Association, assists North Simcoe Victim Crisis Services, the Salvation Army, and the Canadian Red Cross in serving individuals and families that have been affected by a personal tragedy such as a devastating fire destroying their home.

Orillia Y's Men's Scholastic Award

This fund was established by The Orillia Y's Men's Club in 2006 and recognizes strong academic achievement and community/school involvement. It provides a cash award for a total of four students: one graduate from each of the four high schools in Orillia.

continued . . .



Our Ramara Endowment Fund — NEW

This is an endowment fund set up by the 'Our Ramara Steering Committee' for granting to charitable activities or organizations whose activities promote the sustainability of charitable projects within the community of Ramara.

Salvation Army Camp Newport Fund

This endowment fund was established to send local children to Camp Newport, recognizing that quality recreation plays a significant role in the healthy development of children and youth.

Simcoe College Scholarship and Bursary Award Fund

Established by Georgian College through funds received from the Simcoe College Foundation, this fund is awarded to enhance higher education opportunities and to increase access to Georgian College programs for students from Orillia and Area.

The Patti Cox Memorial Children's Fund

This endowment fund was established to assist and support children and children's activities in the Orillia area that focus mainly on personal development that will last a lifetime.

The Patti Cox Memorial Senior's Fund

This endowment fund was established to assist and support seniors and seniors' activities in the Orillia area that focus on improving levels of independence and self-sufficiency.

They Had a Dream Fund (Administration Endowment)

In order to maintain an acceptable level of administration costs on the various funds, this fund was established to support the operating and administration of the Community Foundation of Orillia and Area. It is named "They Had a Dream" in honour of two of the Foundation's founders, Mr. Jim Dykes and Mr. Ken Koyama.

Tom Parish Scholarship Fund

This is a scholarship given annually to an Orillia high school graduate who will be attending a college or university to continue studies in Tourism, Marine Biology, Business, or Environmental Studies, in memory of the late Tom Parish.

Trails For Life Endowment Fund

A permanent endowment fund to help maintain Orillia's Trails For Life, a ten-kilometre multi-use paved trail built in 2000 as part of the Millennium celebrations.

YMCA Skid Watson Endowment Fund

This fund was established by the Orillia YMCA to recognize and promote the legacy of an exceptional man, Skid Watson. It is used each year to assist those children, single parents, and adults in need of assistance with membership and program costs at the Orillia YMCA.



THE COMMUNITY
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2010 DONORS, SPONSORS, AND SUPPORTERS

Your support is sincerely appreciated: donors, sponsors, volunteers, and media partners. You are the individuals, businesses, and organizations who are helping us to fulfill our goal of strengthening our community. If your name was inadvertently omitted, we truly apologize. We'd appreciate your contacting us so that we can ensure that your contribution will be rightfully acknowledged in future.

Don Anderson	Jane Hartin	Orillia Today
Dave Armstrong	Shannelle Hartin	C. Osborne
B&B Climate Care	Zack Hartin	Kate Parsons-Groom
Andrew Barker	Dennis Hay	Claudine Pelaggi
Jenelle Barker	Heather Hay	Pepsi
Paul Barker	Martha Hendir	Pizzaville
Scott Barker	David Hill	R&F Disaster Kleen-Up
Carolyn Baxter	Laura Hill	Terrilyn Rees
Keith Bell	Impression House	Neil Rolland
Best Western Inn	Carol Ivey	RONA
Leigh Bowman	John Howard Society	Rose Printing
Blue Beacon Marina	Kathy's Kakes	Brian Ross
L. Brown	Matthew Kelly	Tami Santore
Tammy Burke-Marson	Jacquie Kennedy	Seanna Kreager Photography
Casino Rama	Brian Kerr	Speedy Signs
Chamber of Commerce	KICX 106	Tineke Steenman
Sammy Cheng	Sue Knox	Bianca Steenman
City of Orillia	Nick Krick	Moniek Steenman
Davenport Subaru	Kutting Edge	Sunshine 89.1
Davis Trophies	Wardine Lapointe	Sunshine BBQ
Clayton Donaghue	Ross Lapointe	Michael Taylor
Dundee Wealth	Daryl Lapointe	TABI International
Garfield Dunlop	Kelly Lassaline	Wendy Taylor
Jim Dykes	Dale Lynch	Linda Taylor-Eddington
Lisa Earl	Madison Cnty Food & Beverage	The Dock
Early Years Centre	Stan Man	The Ontario Trillium Foundation
Joan Filliter	Dean Marson	The Water Store
Merle Fletcher	Allison Matias	Brent Thompson
Diane Fletcher	Gayle McKay	Mike Thompson
Diana Fong	Jesse McKerroll	Thor Motors
Glenn Fraser	D. Meeks	Tim Hortons
Georgian College	Meridian Credit Union	Wendy Timpano
Veronica Giannini	Karen O'Coin	True North Music
Mary Anne Giannini	Orillia & District Constr. Assn	Unison Engine Components
Kim Glaze	Orillia Packet & Times	Christine Wilkinsin
Diane Hardwick	Orillia ProNet	WSI



ORILLIA AND AREA DRAGON BOAT FESTIVAL

Once again, for the 5th year, the popular Dragon Boat Festival was a terrific success, raising more than \$50,000 for the charities and non-profit groups in our community. This is such a great way to build team spirit, have fun, and get some exercise, while helping good causes. Thanks goes out to our valued supporters, donors, sponsors, and volunteers!

Congratulations to the winning teams:

- 1st —The Crimson Wave (Base Borden)
- 2nd —Paddle 'N' Unison (Unison Engine Components)
- 3rd — Blue Dragons (OPP)

Winner of the HRC cup: HRC Forget-Us-Not Dragon Hearts

The 6th annual Dragon Boat Festival is scheduled to take place on Saturday, September 24, 2011 at Couchiching Beach Park. We're sure it will be another great experience!

RANDOM ACTS OF KINDNESS DAY

We hosted our second annual Random Acts of Kindness Day on November 12, 2010. We offer thanks to our sponsor, Davenport Subaru, and to the local businesses and organizations who helped us distribute posters and 5,000 cards throughout the area! Officially declared by the mayor, this event is a great way to remind people of the joys of reaching out to each other with a small kindness. The recipient of a card performs a kind act for someone else — maybe a friend, a family member, or a stranger. The card says:

***You have been touched by a Random Act of Kindness.
Please return the favour and perform a Random Act of
Kindness for a fellow citizen today!***

A simple concept, with a big result! We look forward to our 3rd Random Acts of Kindness Day, to be held on November 4, 2011.

TOUR OF CARDEN PLAIN

On June 10, a group of people boarded a bus and got involved with the mandate of the Couchiching Conservancy. Seeing the lands that the Conservancy works to preserve offered them the chance to better understand the importance of this vital work, and to learn about the Foundation's partnership with the Conservancy through a provincial initiative.





BOARD OF DIRECTORS AND COMMITTEE MEMBERS

BOARD OF DIRECTORS 2011-2012 (proposed)

Bill Price
Darlene Elder, Chair
Jodi Lloyd
Josh McQuay, Vice Chair
Kathy Webb
Kerri Deir
Laura Uttley
Michael Gordon
Sarah Valiquette
Sharron Brown
Trevor Walker
Walter Schummer, Treasurer

BOARD OF DIRECTORS 2010-2011

Bill Price
Carol Ivey, Past Chair
Darlene Elder, Chair
Jodi Lloyd
Kathy Webb
Kerri Deir
Laura Uttley
Michael Gordon
Sharron Brown
Trevor Walker
Walter Schummer, Treasurer

STAFF

Marilyn de Lang, Executive Director

COMMITTEES

Annual Operating Fundraising

Kathy Webb
Kerri Deir
Mike Gordon
Trevor Walker

Asset Development

Charles Sheppard
Josh McQuay
Laura Uttley
Tom Jarvis

Communications & Marketing

Sarah Valiquette
Sharron Brown
Tony Hann, Sunshine
Walter Schummer

Investment

Carol Ivey
Josh McQuay
Ross Ferguson
Tom Jarvis

Nomination

Bill Price
Darlene Elder
Jodi Lloyd
Trevor Walker

GRANTS COMMITTEES

Community Grants

Charles Sheppard
Don Haskins
Mike Davenport
Mike Gordon
Ted Duncan
Trevor Walker

Ontario Soldiers Memorial Hospital Foundation Doctor Recruitment Fund

Dave Carson
Dr. Rose Zacharias
Nicole McCahon

Simcoe College Scholarship & Bursary Award

Josh McQuay
Laura Uttley
Marilyn de Lang
Sheryl McLean

Tom Parish Scholarship Fund

Alice Beiser
Jain Parish
June Parish

SPECIAL EVENTS COMMITTEES

Members of our Board, committees, and the community help with our special events, including: Bill Price, Carol Ivey, Darlene Elder, Jodi Lloyd, Josh McQuay, Kathy Webb, Kerri Deir, Laura Uttley, Lisa Earl, Mike Gordon, Sarah Valiquette, Sharron Brown, Tom Jarvis, Trevor Walker, Wendy Timpano . . . and many, many more! We really appreciate all the hard work and thought that make our events a community pleasure!

We welcome inquiries about getting involved with our Community Foundation. Please call us at 705-259-1163 or e-mail info@communityfoundationorillia.ca to ask how you can become part of our organization. You might like to join a committee or apply for a position on the Board, volunteer for our events, or become a donor or sponsor. We're also happy to explain our options for giving to the Foundation (no contribution is too small!), or how to establish or contribute to an endowment fund that will be used for community grant-making.



THE COMMUNITY
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OF ORILLIA AND AREA

2010 FINANCIAL HIGHLIGHTS

STATEMENT OF FINANCIAL POSITION

As at December 31, 2010	2010	2009
ASSETS		
Cash	43,335	40,376
Temporary Investments	-	25,021
Contributions Receivable	100	1,986
HST Rebate	1,158	323
Prepays	6,171	2,280
	50,764	69,985
Investments	1,304,325	1,201,580
Property Plant & Equipment	-	-
	1,355,089	1,271,565
LIABILITIES		
Current		
Accounts Payable	5,586	9,737
Kiwanis Club of Orillia Managed Fund	15,189	13,964
Deferred Revenue	12,060	-
	32,835	23,701
Deferred Operating Contributions	1,340	21,601
	34,175	45,302
Net Assets		
Endowment Funds	1,249,638	1,178,220
Unrestricted	71,276	48,043
	1,320,914	1,226,263
	1,355,089	1,271,565

The Auditor of record for the Community Foundation of Orillia and Area is Ben T. Cole Professional Corporation. Audited financial statements are available upon request from the Foundation Office.

STATEMENT OF OPERATIONS

As at December 31, 2010	2010	2009
REVENUE		
Administration Fees	7,682	4,506
Donations & Bequests	24,315	21,654
Special Events	33,292	60,466
Investment Income—realized	19,874	21,963
Amortization—		
Deferred Contributions	23,462	19,018
Couchiching Conservancy Tour	1,360	
OTF Grant	18,901	27,099
	128,886	154,706
Less: Grant Disbursements	(40,562)	(45,919)
Total Revenue	88,324	108,787
EXPENDITURES		
Advertising & Promotion	1,067	4,442
Insurance	2,670	3,079
Office and General	4,839	8,493
Professional fees	10,157	9,799
Salaries and benefits	56,187	50,693
Special events	27,848	58,595
Meeting & Stewardship	250	521
	103,018	135,622
Surplus (Deficit) from Operating	(14,694)	(26,835)
Unrealized Gain (Loss) on Investments	37,927	64,327
Surplus (Deficit) For the Year	23,233	37,492

NET ASSETS RESTRICTED FOR ENDOWMENT PURPOSES

The Endowment Funds represent amounts donated to the foundation for which the capital is directed to be preserved, and include both designated and undesignated components.

	2009	Donations	2010
Administration Fund: They Had A Dream	10,400	-	10,400
Apprenticeship Bursary	12,660	4,448	17,108
Carol Ivey Victim Crisis Services Fund	10,079	500	10,579
Casino Rama Festive Fund	16,620	2,000	18,620
Couchiching Conservancy Land Stewardship Fund	3,493	10,335	13,828
Community Unrestricted Fund	555,101	550	555,651
Ont. Endow. for Children & Youth in Recreation	89,372	-	89,372
Orillia Volunteer Firefighters Disaster Relief Fund	8,551	-	8,551
Orillia Y's Men's Fund	45,000	-	45,000
OSMHF Doctor Recruitment Fund	25,125	-	25,125
Our Ramara Endowment Fund	-	20,000	20,000
Patti Cox Memorial Children's & Senior's Funds	296,330	-	296,330
Salvation Army Camp Newport Fund	1,250	-	1,250
Simcoe College Scholarship & Bursary Award	50,000	-	50,000
Tom Parish Scholarship Fund	18,375	-	18,375
Trails For Life Fund	10,082	-	10,082
YMCA Skid Watson Fund	70,000	-	70,000
	<u>\$1,222,438</u>	<u>37,833</u>	<u>1,260,271</u>



Our commitment

The Community Foundation of Orillia and Area is committed to protecting the privacy of personal information of current and potential donors, current and potential grantees, employees, volunteers, and other individuals. We value the trust of those who deal with us, and of the public, and recognize that maintaining this trust requires that we be transparent and accountable in how we treat the personal information that is shared with us.

During the course of our activities as a community foundation, at times we gather and use personal information. Anyone from whom we collect such information should expect that it will be carefully protected and that any use of or other dealing with this information is subject to consent. Our privacy practices are designed to achieve this.

Defining personal information

Personal information is any information that can be used to distinguish, identify, or contact a specific individual. This information can include an individual's opinions or beliefs, as well as facts about, or related to, the individual. Exceptions: business contact information and certain publicly available information (such as names, addresses, and telephone numbers as published in telephone directories) are not considered personal information.

Where an individual uses his or her home contact information as business contact information as well, we consider that the contact information provided is business contact information, and is not therefore subject to the same protection afforded to personal information.

Privacy practices

Personal information gathered by our organization is kept in confidence. Our personnel are authorized to access personal information based only on their need to deal with the information for the reason(s) for which it was obtained. Safeguards are in place to ensure that the information is not disclosed or shared more widely than is necessary to achieve the purpose for which it was gathered. We also take measures to ensure that the integrity of this information is maintained and to prevent its loss or destruction.

We collect, use, and disclose personal information only for purposes that a reasonable person would consider appropriate in light of the circumstances. We routinely offer individuals with whom we deal the opportunity to opt not to have their information shared for purposes beyond those for which it was explicitly collected.

Website

The Community Foundation of Orillia and Area is committed to safeguarding visitor privacy on its website.

Updating of privacy policy

We regularly review our privacy practices for our various activities, and update our policy.

Contact Information

Any questions, concerns, or complaints relating to the Community Foundation of Orillia and Area's privacy policy on the treatment of personal information should be directed to:

The Community Foundation of Orillia and Area, 705-259-1163, info@communityfoundationorillia.ca



THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA

THANK YOU TO OUR MAJOR CONTRIBUTORS!



Thank you to our largest founding partner, the Casino Rama Community Wellness Fund, for believing in the Community Foundation and for their ongoing support!



DUNDEEWEALTH

Thank you to Dundee Wealth for their ongoing support to the Community Foundation and for generously providing us with a home to carry out our community work.



THE ONTARIO TRILLIUM FOUNDATION
LA FONDATION TRILLIUM DE L'ONTARIO

The support of The Ontario Trillium Foundation has been instrumental in providing the Community Foundation with the ability to make great progress and a positive impact on our community. Thank you for the continued support!

A special thank you goes out to the following supporters for making a significant contribution to our Community Foundation this year.

KICX 106 / The Dock

Sunshine 89.1 Radio

RBC Dominion

Securities /Ivey Group

Davenport Subaru

The City of Orillia

The Orillia Packet & Times

Orillia Today



COMMUNITY FOUNDATIONS OF CANADA
FONDATIONS COMMUNAUTAIRES DU CANADA

We are part of Canada's community foundation movement, represented by more than 175 community foundations from coast to coast.

The Community Foundation of Orillia and Area is a registered charity

(Registered Charitable No. 86803 8951 RR0001)

Donations are eligible for an income tax receipt.