



THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA



Annual Report 2014





Message from the Chairman of the Board

2014 was another strong year of growth for the Community Foundation of Orillia and Area. With our administration contract with the CDC working well, we were able to continue to focus strongly on our core activities of building, managing 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 grow our funds by over \$600,000. This growth was driven largely by growth in the W. Scott & Jean Tudhope Fund and the establishment of new funds by the Mariposa Folk Foundation and the Orillia Museum of Art & History. Our goal is to grow our portfolio to over \$5 million by 2017 and we are actively working with local charities, professional advisors and donors to reach this goal.

In the management of our existing endowment funds, we ended the year with a total investment portfolio value of over \$3.0 million. 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 nearly 10% in 2014. Our alternate investment manager agreement with Karen O'Coin at BMO Nesbitt Burns to manage the new Tudhope Fund had a successful second year and we look forward to continuing this relationship going forward.

On the granting front, we awarded nearly \$115,000 worth of grants to local charities including the The Sharing Place Food Bank, Autism Ontario, Camp Couchiching, The Lighthouse, Jubilee House, Telecare Distress Line, Colwater Heritage Museum and others. These grants helped these charities to deliver the critical services they provide to our community. In addition to granting from our endowment funds, we were fortunate in 2014 to receive donations from the Orillia Vocal Ensemble, and both our Investment Managers that we flowed-through directly into additional grants to local charities totaling over \$7,500.

It is critical to remember that the CFOA is not a front-line charity delivering service to the community. We are an enabler. We connect donors with a desire to give back to our community 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 given their time and effort to make all of this good work possible.

Michael Gordon
Chair, CFOA Board of Directors



The 2014-15 Board of Directors

Michael Gordon, President
Chris Hazel, Vice-President
Blake Begy, Treasurer
Jim Dykes
Lisa Ferry
Jodi Lloyd
Bill Swinimer
Trevor Walker
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
Jim Dykes
Lisa Ferry
Chris Hazel
Bill Swinimer
Paul Taylor

Investment

Chris Hazel: Chair
Blake Begy
Lisa Ferry
Michael Gordon
Tom Jarvis
Glenn Meeuwisse
Bill Swinimer

Community Grants

Trevor Walker: Chair
Michael Davenport
Don Haskins
Jodi Lloyd
Anna Proctor
Charles Sheppard
Kathy Webb

Professional Management

Investment Management

Connor, Clarke & Lunn
BMO Nesbitt Burns

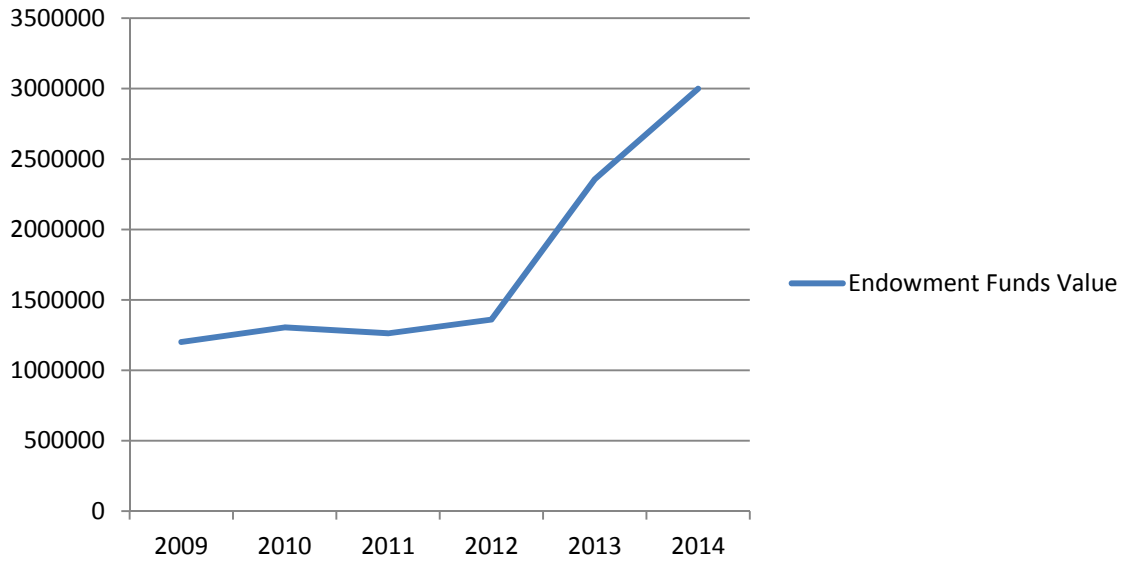
Auditor

Ben T. Cole Professional
Corporation

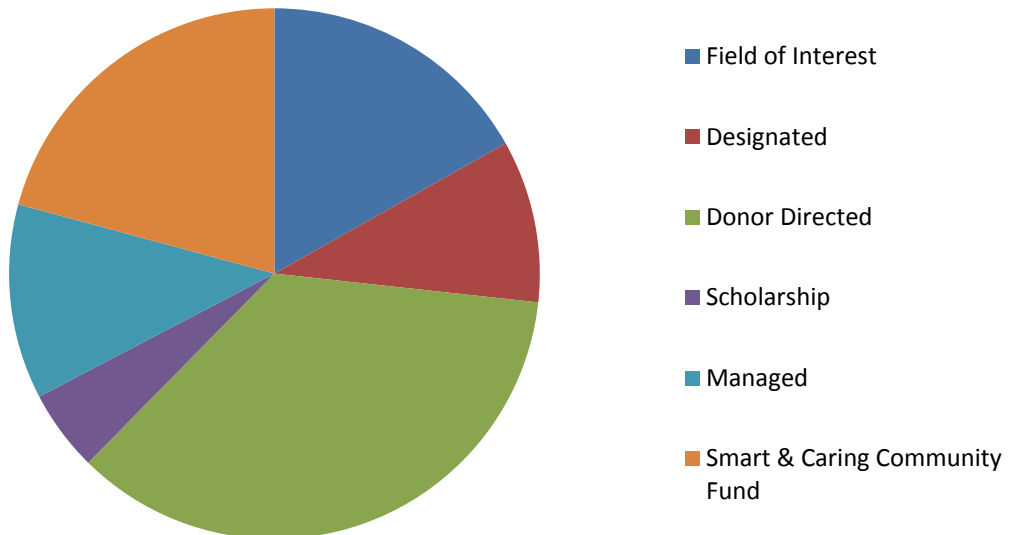


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Endowment Funds Value

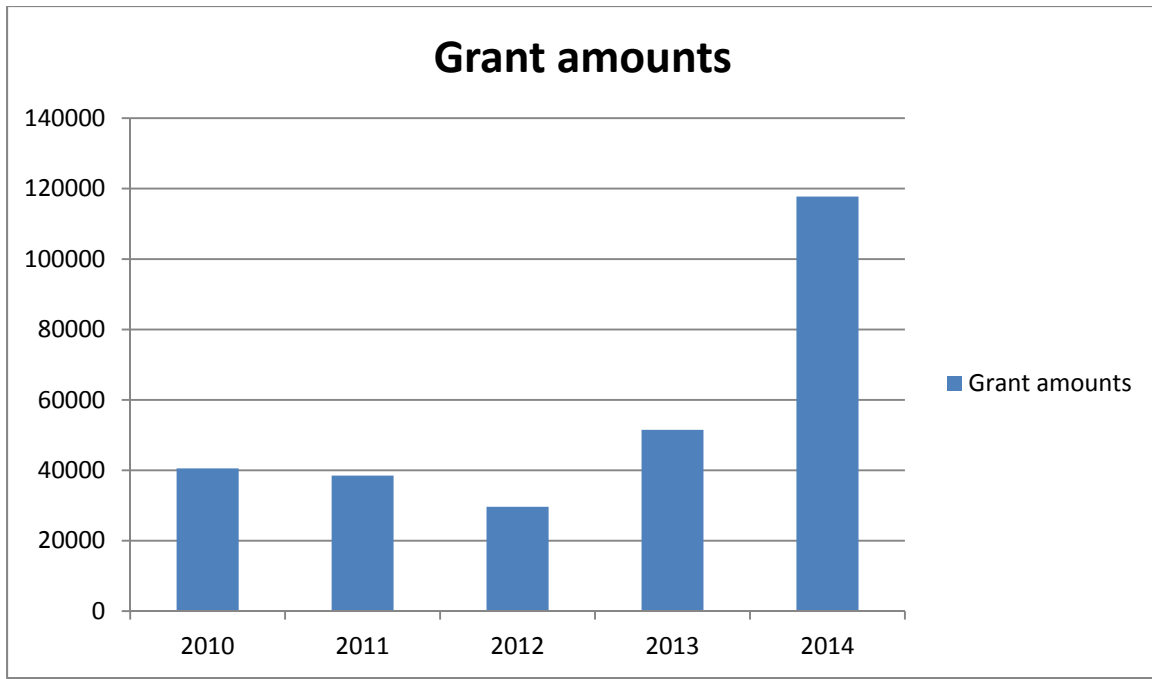


Endowment Funds





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Granting in 2014

The CFOA was pleased to be able to grant to the following organizations in 2014:

Autism Ontario	Mariposa Folk Foundation
Big Brothers Big Sisters	North Simcoe Victim Crisis Services
Calvary Pentecostal Tabernacle	Ontario Humane Society
Camp Couchiching	Orillia Museum of Art & History
Canadian Authors Association	OSMH Foundation
Canadian Red Cross Society	Orillia Youth Symphony Orchestra
City of Orillia/ Trails for Life	Orillia Vocal Ensemble
Coldwater Heritage Museum	Salvation Army
Couchiching Conservancy	Sharing Place Food Bank
Couchiching Jubilee House	Simcoe Community Services
Georgian College	Simcoe County District School Board
Green Haven	St. Vincent De Paul Society
Horseplay Sanctuary	St Andrews Presbyterian Church
Information Orillia	Telecare Distress Line of Greater Simcoe
Junior Achievement PLM	Township of Ramara
Lakehead University	Township of Oro-Medonte
Lighthouse Christian Ministries	YMCA