



THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA



Annual Report 2015





Message from the Chairman of the Board

The Community Foundation of Orillia and Area had a solid performance in 2015. Our administration contract with the CDC continued to work well, allowing us 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 over \$180,000 in new funds. This growth was driven largely by growth in the W. Scott & Jean Tudhope Fund, the establishment of a new fund by the Cellar Singers and additional contributions to both the Orillia Museum of Art & History Fund and the Smart & Caring Community Fund. 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 over 8% in 2015. We maintained our alternate investment manager agreement with Karen O'Coin at BMO Nesbitt Burns to manage the Tudhope Fund and look forward to continuing this relationship going forward.

On the granting front, we awarded \$120,000 worth of grants to 39 local charities. That brings our total granting since 1999 to over \$670,000 to 115 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 2015 to receive a \$4,000 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 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 2015-16 Board of Directors

Michael Gordon, President
Chris Hazel, Vice-President
Peter Brown, 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
Bill Swinimer
Lisa Ferry
Michael Gordon
Tom Jarvis
Glenn Meeuwisse

Community Grants

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

Professional Management

Investment Management

Connor, Clarke & Lunn
BMO Nesbitt Burns

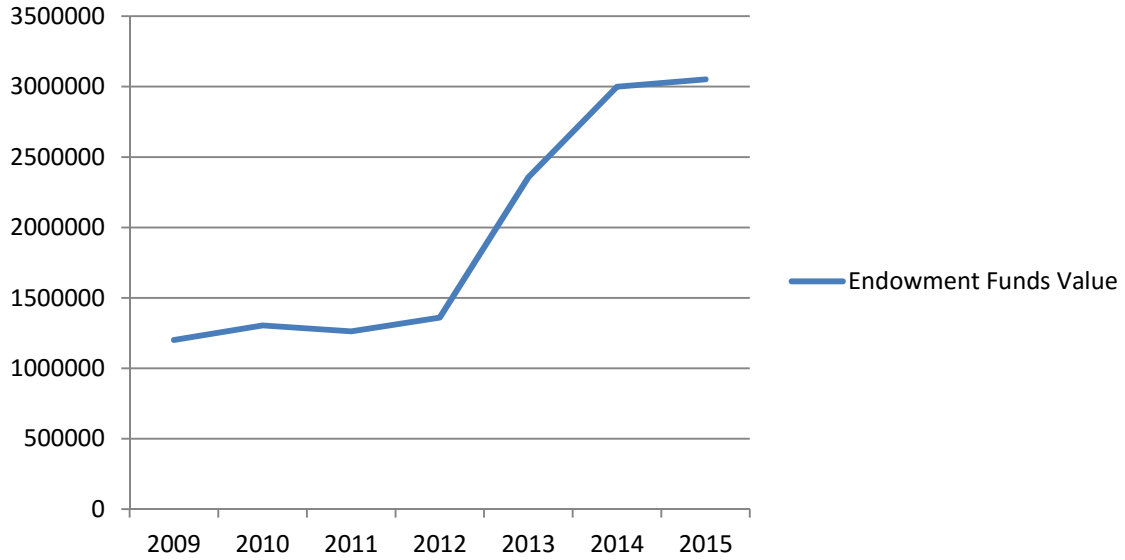
Auditor

Ben T. Cole Professional
Corporation

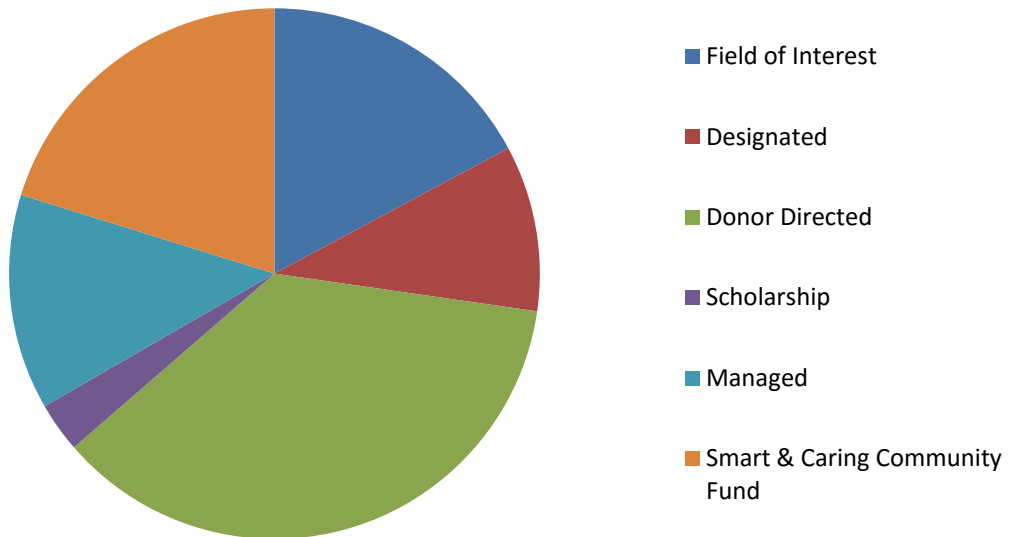


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Endowment Funds Value

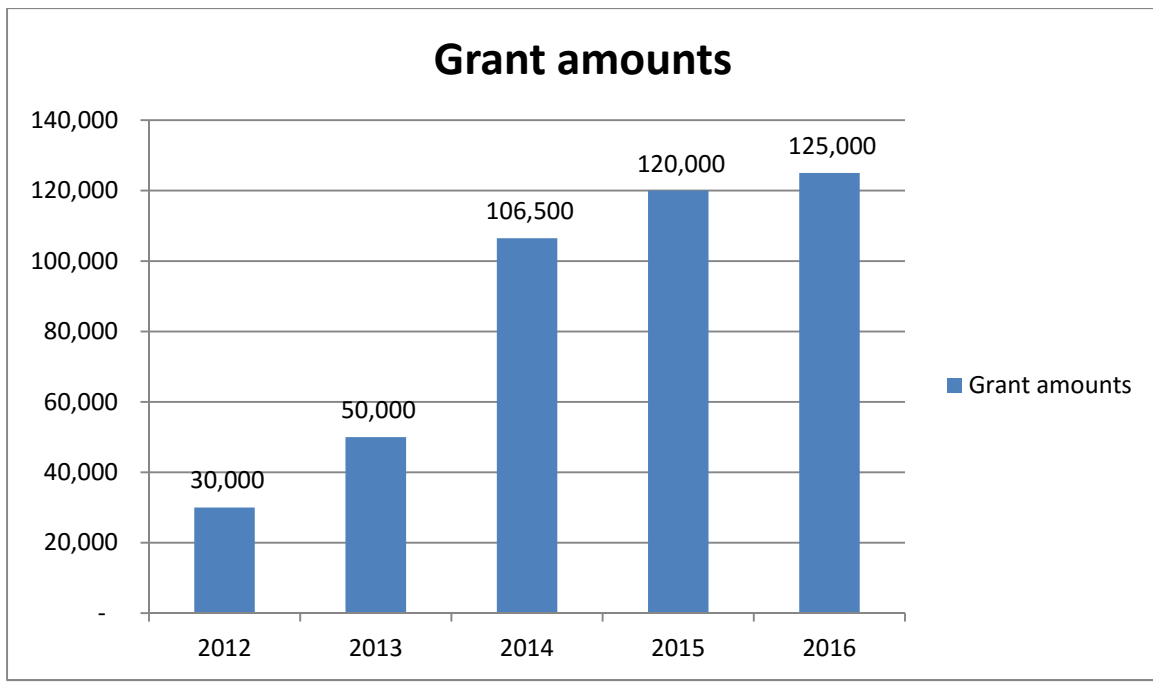


Endowment Funds





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Granting in 2015

The CFOA was pleased to be able to grant to the following organizations in 2015:

Autism Ontario	Ontario Humane Society
Big Brothers Big Sisters	Orillia Christian Centre
Calvary Pentecostal Tabernacle	Orillia Housing Resource Centre
Camp Couchiching	Orillia Museum of Art & History
Canadian Red Cross Society	Orillia Seniors Centre
Child Advocacy Centre	OSMH Foundation
Couchiching Conservancy	Orillia Youth Centre
Couchiching Jubilee House	Orillia Youth Symphony Orchestra
Eat Well to Excel	Orillia Vocal Ensemble
Georgian College	Salvation Army
Green Haven	Seasons Centre for Grieving Children
Hillcrest Lodge	Sharing Place Food Bank
Hope Community Christian Church	Simcoe County District School Board
Information Orillia	St Andrew's Presbyterian Church
Junior Achievement PLM	St James Anglican Church
Kiwanis Orillia	St Vincent de Paul
Lakehead University	Telecare Distress Line of Greater Simcoe
Lighthouse Christian Ministries	Township of Ramara
Mariposa Folk Foundation	YMCA
North Simcoe Victim Crisis Services	



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