



THE COMMUNITY  
FOUNDATION  
OF ORILLIA AND AREA



## Annual Report 2016





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

The Community Foundation of Orillia and Area had a fantastic year in 2016. 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 \$1 million in new funds! This growth was driven by the establishment of 3 new donor directed funds (Brian Adams, Dale Family and John Galt), new designated funds (St Paul's, the Sharing Place and Orillia Fish & Game Conservation Club), and additional contributions to several funds (Couchiching Conservancy, Big Brothers Big Sisters and the W. Scott & Jean Tudhope Fund). Our goal is to grow our portfolio to over \$5 million by the end of 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 \$4.2 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 6% in 2016. We maintained our alternate investment manager agreement with Karen O'Coin at BMO Nesbitt Burns to manage the W. Scott & Jean Tudhope Fund and established a new relationship with Brandon Hune at RBC Dominion Securities to manage the Dale Family Fund.

On the granting front, we awarded \$130,000 worth of grants to 38 local charities. That brings our total granting since 1999 to over \$800,000 to 118 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 2016 to receive a \$5,000 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 2016-17 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**

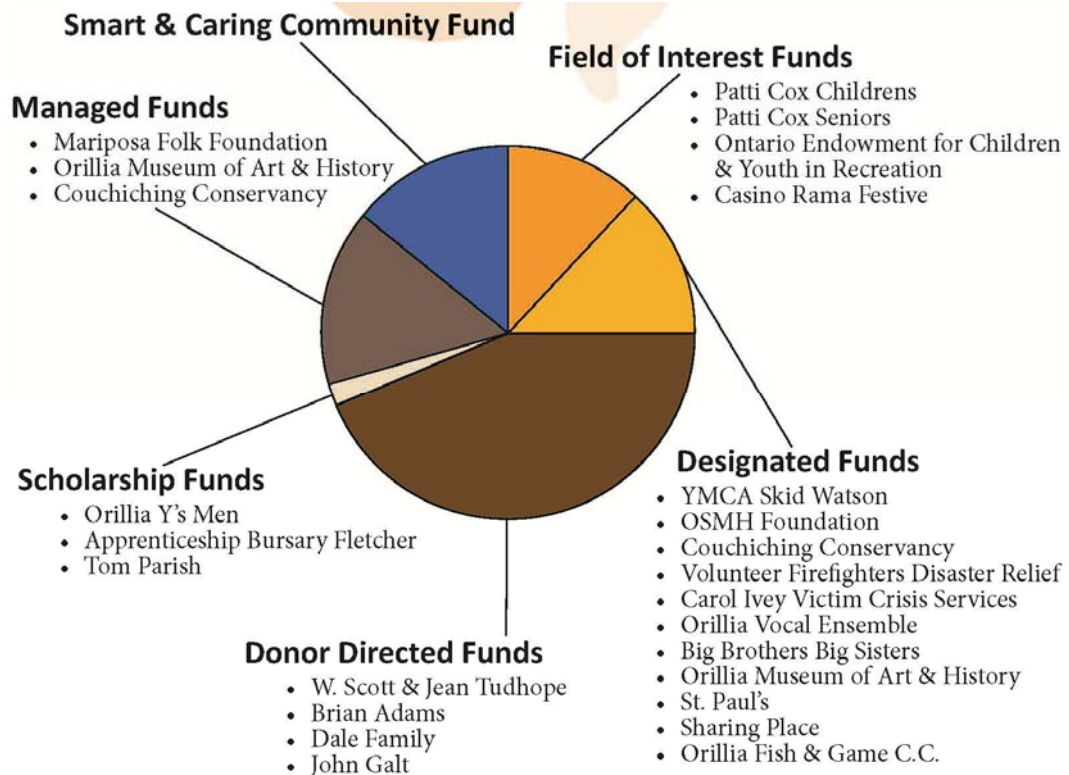
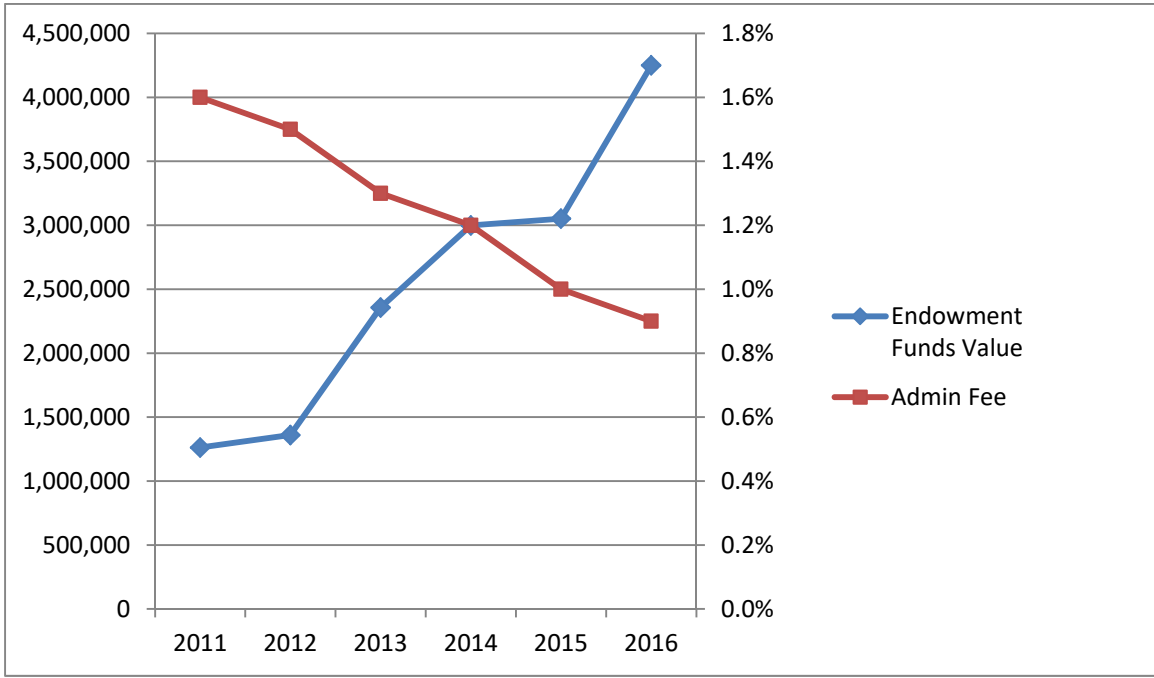
Connor, Clarke & Lunn  
BMO Nesbitt Burns  
RBC Dominion Securities

### **Auditor**

Ben T. Cole Professional  
Corporation

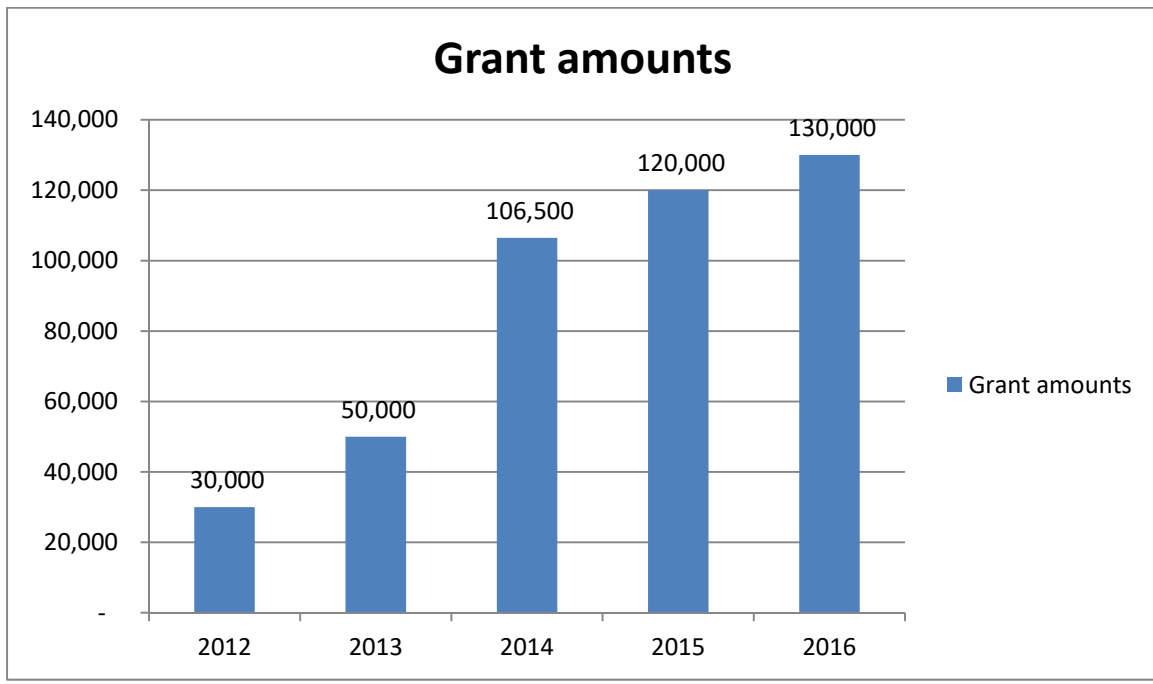


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### Granting in 2016

Since 1999, the Community Foundation has granted more than \$800,000 to over 100 organizations in our community including the following organizations in 2016:

Big Brothers Big Sisters	Orillia Christian Centre
Calvary Pentecostal Tabernacle	Orillia District Arts Council
Camp Couchiching	Orillia Library
Canadian Red Cross Society	Orillia Museum of Art & History
Couchiching Conservancy	Orillia Seniors Centre
Couchiching Jubilee House	OSMH Foundation
Early Years Centre Simcoe North	Orillia Youth Centre
Georgian College	Orillia Youth Symphony Orchestra
Green Haven	Orillia Vocal Ensemble
Helping Hands	Salvation Army
Information Orillia	Sharing Place Food Bank
Junior Achievement PLM	Simcoe County District School Board
Kiwanis Orillia	St Andrew's Presbyterian Church
Lakehead University	St James Anglican Church
Lighthouse Christian Ministries	St Paul's Centre
Living for Jesus	St Vincent de Paul
Mariposa Folk Foundation	Ten Oaks Project
North Simcoe Victim Crisis Services	Township of Ramara
Ontario Humane Society	YMCA



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