



THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA



Annual Report 2017





Message from the Chairman of the Board

The Community Foundation of Orillia and Area had another outstanding year in 2017. 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 \$935,000 in new funds! This growth was driven by the establishment of 4 new funds (Larsen Family Scholarship, Air Cadets, Fish & Game C.C, Orillia Shrine Club), and additional contributions to several existing funds. We have achieved our goal to grow our portfolio to over \$5 million by the end of 2017! As of the end of 2017, our portfolio is over \$5.3 million. We will continue to work actively with local charities, professional advisors and donors to continue our strong record of growth.

In the management of our existing funds, 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 7% in 2017. We maintained our successful alternate investment manager agreements with Karen O'Coin at BMO Nesbitt Burns to manage the W. Scott & Jean Tudhope Fund and with Brandon Hune at RBC Dominion Securities to manage the Dale Family Fund.

On the granting front, we awarded \$200,000 worth of grants to 52 local charities, including \$20,000 from Community Foundations Canada as part of their Canada150 granting program. That brings our total granting since 1999 to over \$1 million to over 120 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



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The 2017-18 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
Kellie Beasley
Jim Dykes
Lisa Ferry
Chris Hazel
Bill Swinimer
Paul Taylor

Investment

Chris Hazel: Chair
Lisa Ferry
Bill Swinimer
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

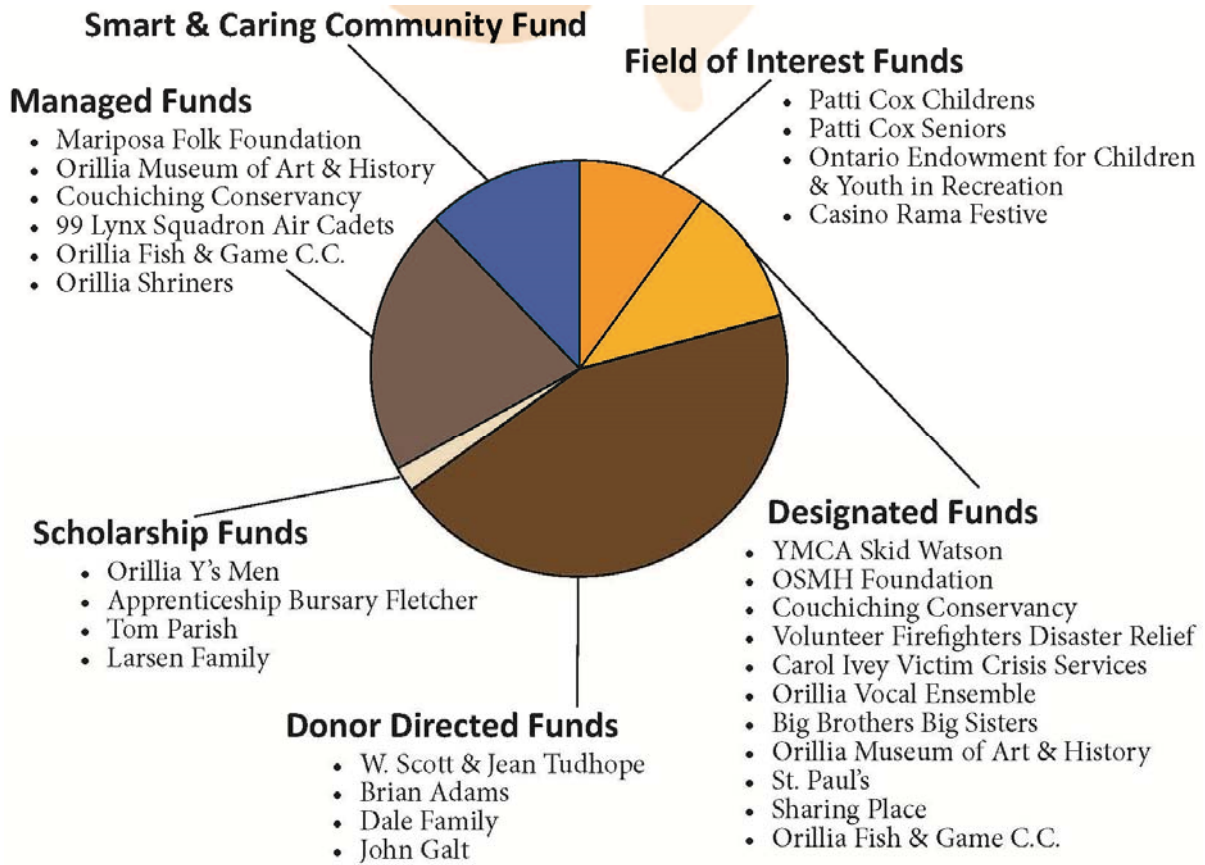
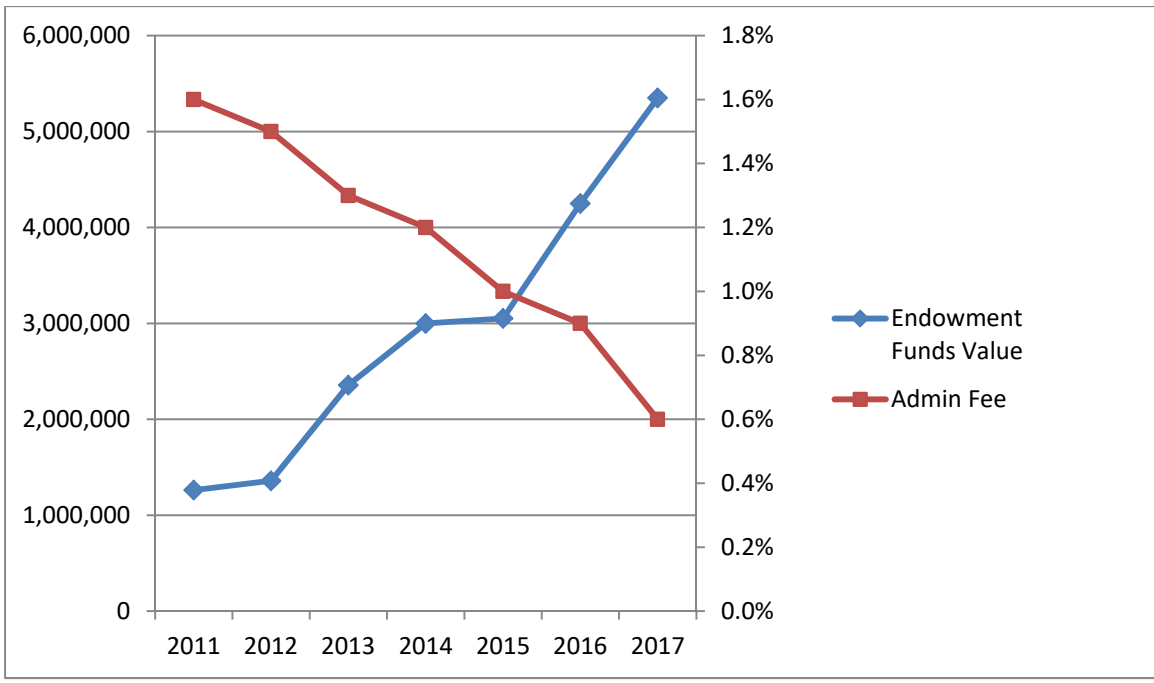
Professional Management

Investment Management

Connor, Clarke & Lunn
BMO Nesbitt Burns
RBC Dominion Securities

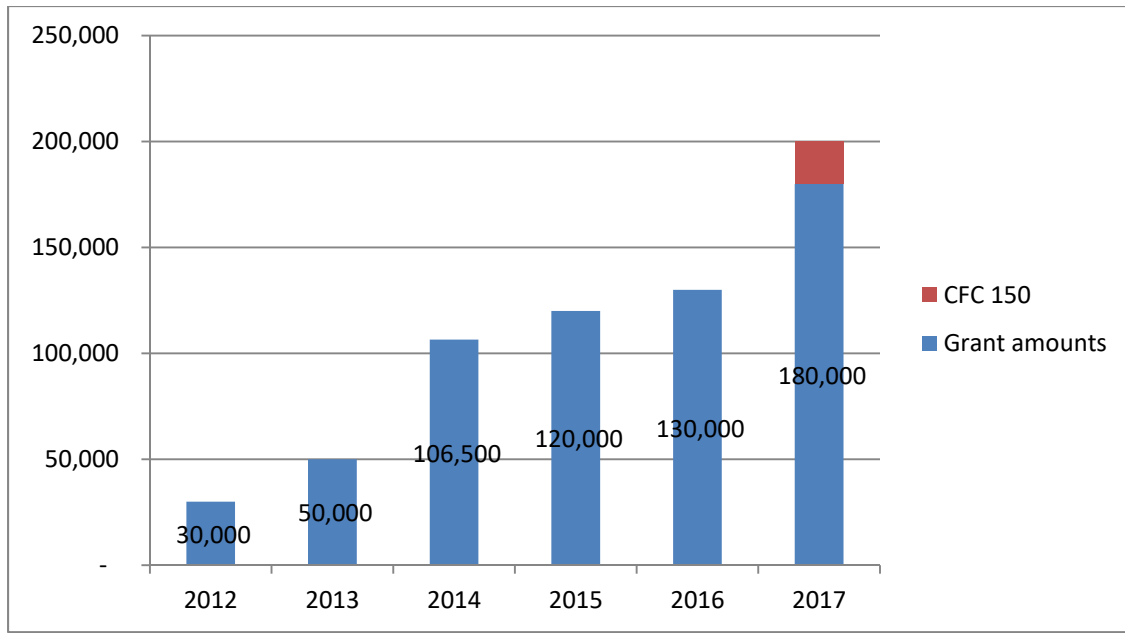
Auditor

Ben T. Cole Professional
Corporation





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Granting in 2017

Since 1999, the Community Foundation has granted more than \$1,000,000 to over 100 organizations in our community including the following organizations in 2017:

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| 1 st Orillia Scouts | Mariposa Arts Theatre |
| Big Brothers Big Sisters | North Simcoe Victim Crisis Services |
| Brechin P.S. | Ontario Humane Society |
| Calvary Pentecostal Tabernacle | Orillia Concert Band |
| Camp Couchiching | Orillia District Arts Council |
| Canadian Red Cross Society | Orillia Museum of Art & History |
| Child Advocacy Centre | OSMH Foundation |
| City of Orillia – Heritage Committee | Orillia Youth Centre |
| Coldwater Canadiana Museum | Orillia Vocal Ensemble |
| Couchiching Conservancy | Ramara Historical Society |
| Couchiching Jubilee House | Rainbows |
| Dress for Success | Regent Park P.S. |
| Early Years Centre Simcoe North | Salvation Army |
| Eat Well to Excel | Scouts Canada |
| Georgian College | Sharing Place Food Bank |
| Gilda's Club | St Andrew's Presbyterian Church |
| Green Haven | St James Anglican Church |
| Helping Hands | St Paul's Centre |
| Horse Sanctuary | St Vincent de Paul |
| Information Orillia | Township of Oro-Medonte |
| John Howard Society | Township of Ramara |
| Junior Achievement PLM | Trillium Manor |
| Kiwanis Orillia | Uptergrove P.S. |
| Lagoon City Community Association | Washago Community Centre |
| Lakehead University | YMCA |
| Lighthouse Christian Ministries | 99 Lynx Squadron Air Cadets |