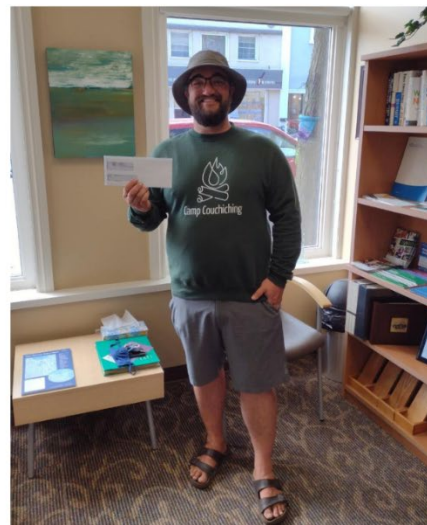




THE COMMUNITY  
FOUNDATION  
OF ORILLIA AND AREA

## Annual Report 2022





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

In 2022, the Community Foundation of Orillia had a successful year. Thanks to our incredibly lean and simple organization – as a result of our administration contract with the CDC – and our financial model that does not require any fundraising for our operating costs, we were able 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 \$1,200,000 in new funds! This growth included donations from the Estate of Scott Tudhope, additions to our other existing Donor Directed, Managed and Designated Funds and 2 new funds. As of the end of 2022, our portfolio is over \$15.0 million. Going forward, 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 -6.4% in 2022 during a challenging year for the markets. We maintained our successful alternate investment management 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 in 2022, we granted over \$425,000 to over 50 local charities. That brings our total granting since 1999 to over \$2.6 million to more than 150 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 2022 to receive an \$10,000 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 over the very long term 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 volunteered their time and effort to make all of this good work possible.

Michael Gordon  
Chair, CFOA Board of Directors



THE COMMUNITY  
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## **The 2022-23 Board of Directors**

Michael Gordon, President  
Chris Hazel, Vice-President  
Peter Brown, Treasurer  
Jim Dykes  
Lisa Ferry  
Jodi Lloyd  
Douglas Varty  
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  
Paul Taylor  
Douglas Varty

#### **Investment**

Chris Hazel: Chair  
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**

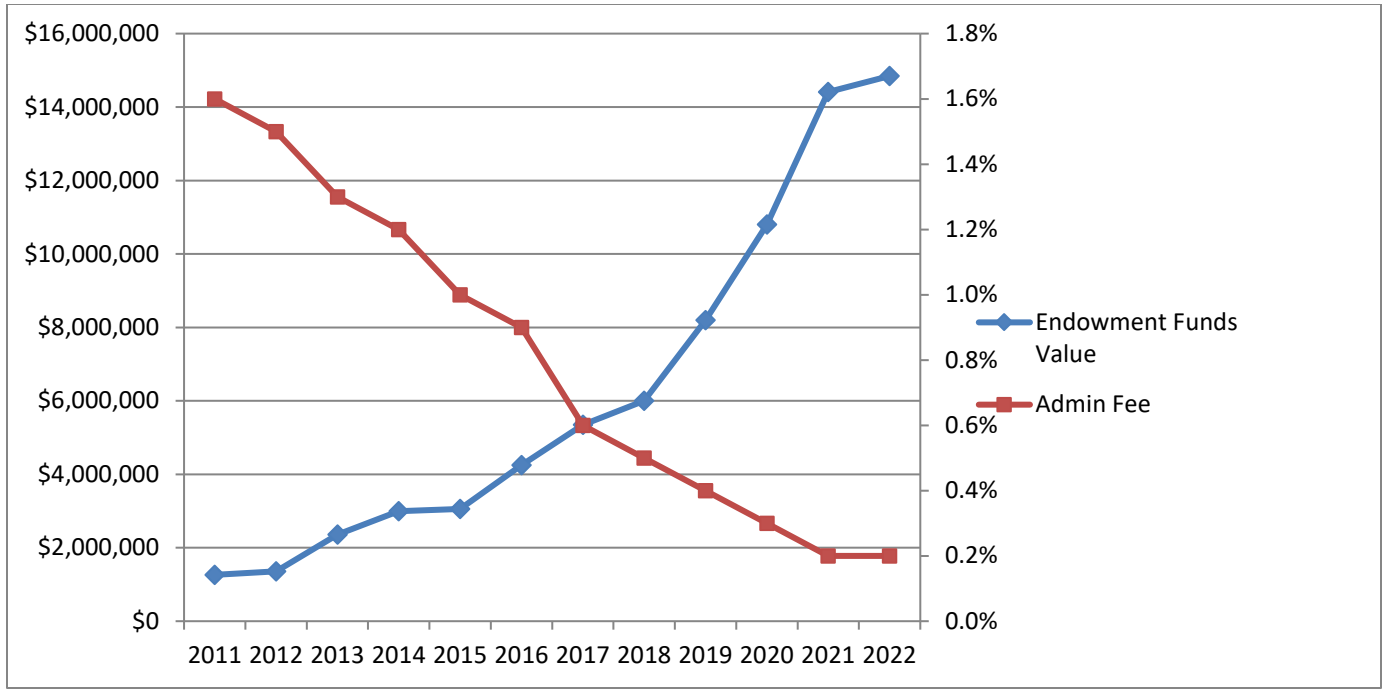
Investment Management  
Connor, Clarke & Lunn  
BMO Nesbitt Burns  
RBC Dominion Securities

#### Auditor

Hehn Trickey Professional  
Corporation



THE COMMUNITY  
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OF ORILLIA AND AREA



### Managed Funds

- Mariposa Folk Foundation
- Couchiching Conservancy
- Orillia Museum of Art & History
- 99 Lynx Squadron Air Cadets
- Orillia Fish & Game C.C.
- Orillia Shriners
- St. Paul's
- Magnetawan Land Trust
- Orillia Minor Hockey
- Rainy Lake Conservancy

### Smart & Caring Community Fund

### Field of Interest Funds

- Patti Cox Childrens
- Patti Cox Seniors
- Ontario Endowment for Children & Youth in Recreation
- Casino Rama Festive

### Scholarship Funds

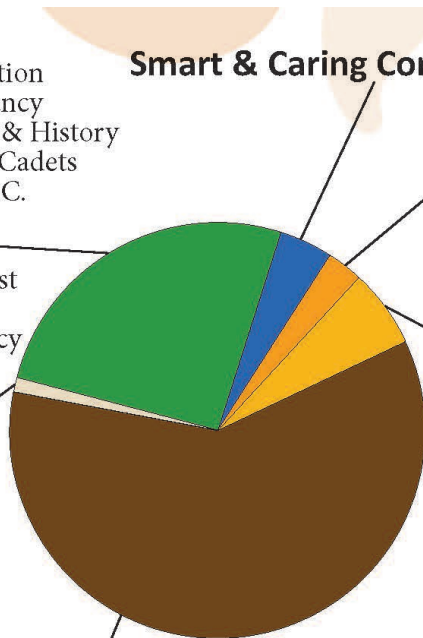
- Orillia Y's Men
- Apprenticeship Bursary Fletcher
- Tom Parish
- Larsen Family

### Designated Funds

- YMCA Skid Watson
- OSMH Foundation
- Couchiching Conservancy
- Volunteer Firefighters Disaster Relief
- Carol Ivey Victim Crisis Services
- Orillia Vocal Ensemble
- Big Brothers Big Sisters
- Orillia Museum of Art & History
- St. Paul's
- Sharing Place
- Orillia Fish & Game C.C.
- Stephen Leacock Associates
- Orillia Youth Centre
- The Lighthouse
- Mariposa House Hospice

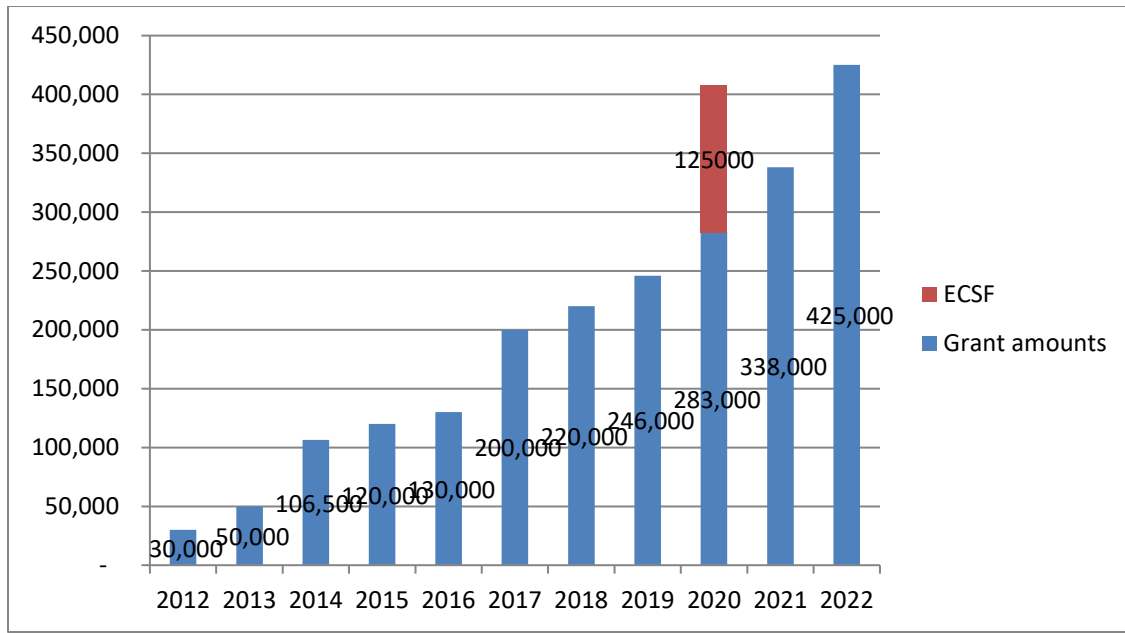
### Donor Directed Funds

- W. Scott & Jean Tudhope
- John Galt
- Dale Family
- Brian Adams
- Jim & Ruth Watt
- Jarvis Family





THE COMMUNITY  
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OF ORILLIA AND AREA



### Granting in 2022

Since 1999, the Community Foundation has granted more than \$2,600,000 to over 150 organizations in our community including the following organizations in 2022:

- |                                     |                                       |
|-------------------------------------|---------------------------------------|
| Alzheimers Society                  | Ontario SPCA                          |
| Big Brothers Big Sisters            | Orillia Concert Band                  |
| Camp Couchiching                    | Orillia Fish & Game Conservation Club |
| Campfire Circle Muskoka             | Orillia Museum of Art & History       |
| Canadian Guide Dogs for the Blind   | Orillia Public Library                |
| Canadian Red Cross Society          | OSMH Foundation                       |
| Child Advocacy Centre               | Orillia SPCA                          |
| Comfie Cat Shelter                  | Orillia Youth Centre                  |
| Couchiching Conservancy             | Orillia Vocal Ensemble                |
| Couchiching Jubilee House           | Rainbows                              |
| Emmanuel Baptist Church             | Ramara Library                        |
| Georgian College                    | Royal Canadian Legion Orillia         |
| Gilda's Club Simcoe Muskoka         | Royal Victoria Hospital               |
| Green Haven                         | Salvation Army                        |
| Helping Hands                       | Scientists in School                  |
| Hill House Hospice                  | Sharing Place Food Bank               |
| Hospice Orillia                     | Simcoe County District School Board   |
| Information Orillia                 | St Andrew's Presbyterian Church       |
| Independent Living Services         | St James Anglican Church              |
| Kidney Foundation                   | St Paul's Centre                      |
| Lakehead University                 | St Vincent de Paul                    |
| Lighthouse Christian Ministries     | Toronto Humane Society                |
| March of Dimes                      | World Vision                          |
| Mariposa House Hospice              | Youth Haven                           |
| Nature Conservancy of Canada        | YMCA                                  |
| North Simcoe Victim Crisis Services |                                       |



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NOTES:



THE COMMUNITY  
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**THE COMMUNITY  
FOUNDATION  
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*A locally run, public foundation  
that builds and manages permanent endowment funds from  
charitable donations and grants the income each year to local  
charities based on their needs and the needs of the community.*

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