

THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA

Annual Report 2023





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OF ORILLIA AND AREA

Message from the Chairman of the Board

In 2023, the Community Foundation of Orillia had an amazing 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 \$4,200,000 in new funds! This growth included additions to our existing Donor Directed, Managed and Designated Funds and 2 new funds. As of the end of 2023, our portfolio is over \$20.0 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 9.5% in 2023 during a variable year for the markets. We maintained our successful alternate investment management agreements with Karen O'Coin and Scott Walker 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 2023, we granted over \$715,000 to over 50 local charities. That brings our total granting since 1999 to over \$3.0 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 2023 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 intermediary and 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



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The 2023-24 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
Cindy Davenport
Kim Goggins
Don Haskins
Jodi Lloyd
Anna Proctor
Kathy Webb

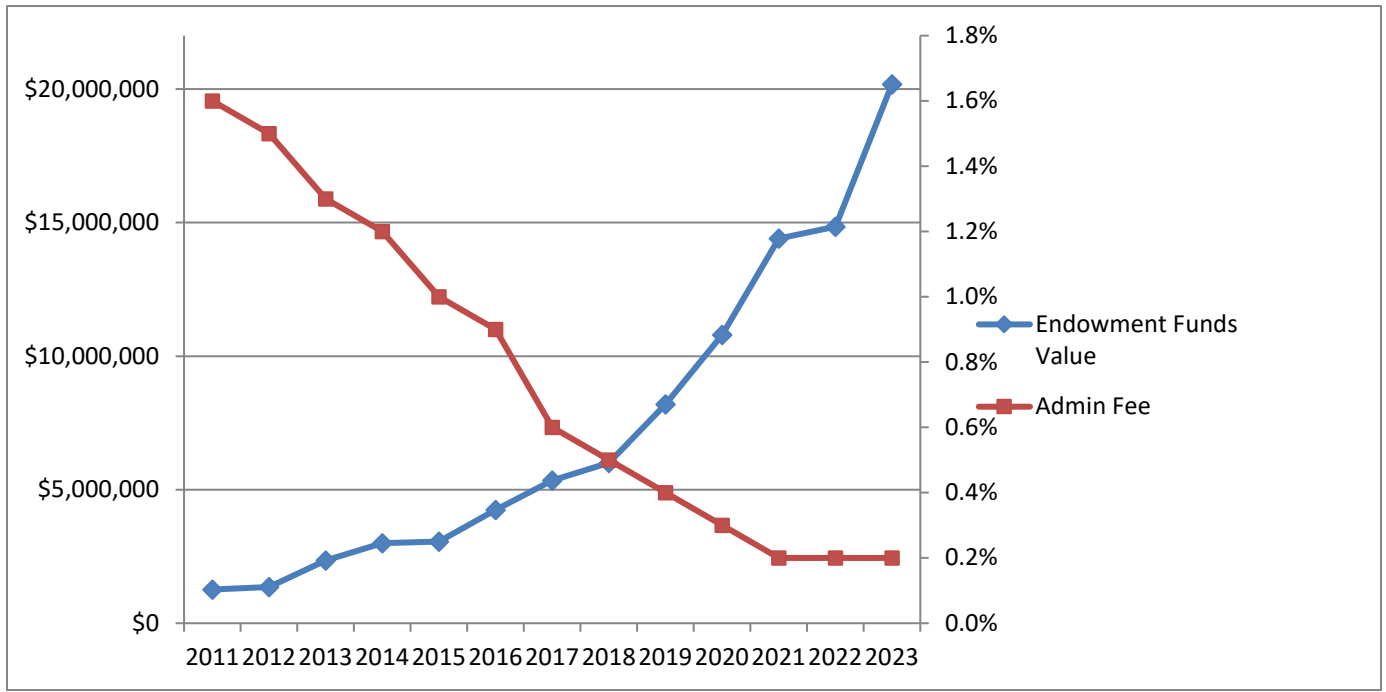
Professional Management

Investment Management

Connor, Clarke & Lunn
BMO Nesbitt Burns
RBC Dominion Securities

Auditor

Hehn Trickey Professional Corporation



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
- Huronia Community Foundation

Smart & Caring Community Fund

Field of Interest Funds

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

Designated Funds

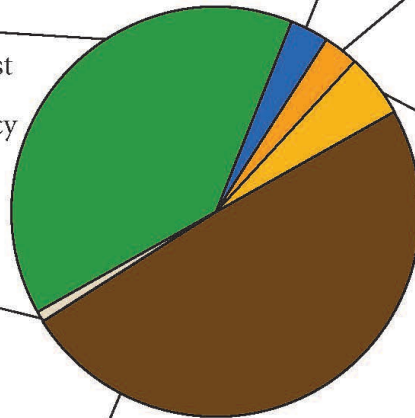
- YMCA Skid Watson
- OSMH Foundation
- Couchiching Conservancy
- Volunteer Firefighters Disaster Relief
- Carol Ivey Victim Crisis Services
- Orillia Vocal Ensemble
- Big Brothers Big Sisters
- Orillia Museum of Art & History
- St. Paul's
- Sharing Place
- Orillia Fish & Game C.C.
- Stephen Leacock Associates
- Orillia Youth Centre
- The Lighthouse
- Mariposa House Hospice
- North Simcoe 4H Club

Scholarship Funds

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

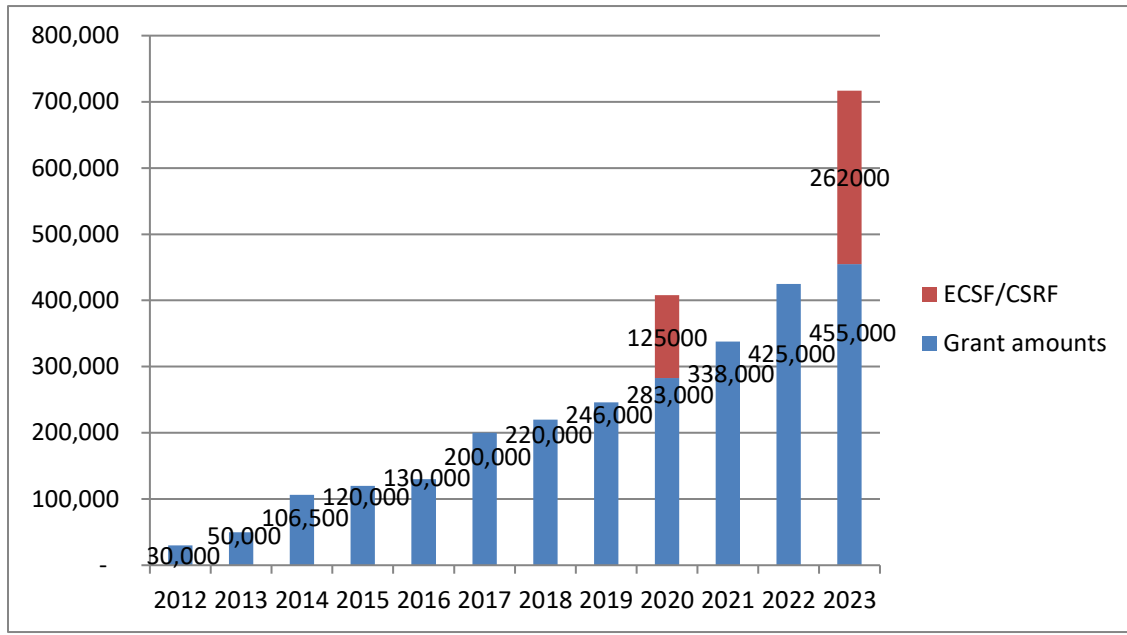
Donor Directed Funds

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





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Granting in 2023

Since 1999, the Community Foundation has granted more than \$3,000,000 to over 150 organizations in our community including the following organizations in 2023:

- | | |
|-----------------------------------|---------------------------------------|
| Alzheimer Society | Nature Conservancy of Canada |
| Arts Orillia | North Simcoe Victim Crisis Services |
| Big Brothers Big Sisters | Ontario SPCA |
| Blind Beginnings | Orillia Concert Band |
| Bridget's Bunnies Infant Loss | Orillia Fish & Game Conservation Club |
| Camp Couchiching | Orillia Museum of Art & History |
| Campfire Circle Muskoka | Orillia Public Library |
| Canadian Guide Dogs for the Blind | Orillia SPCA |
| Canadian Red Cross Society | Orillia Vocal Ensemble |
| Child Advocacy Centre | Orillia Youth Centre |
| Comfie Cat Shelter | OSMH Foundation |
| Couchiching Conservancy | Rainbows |
| Couchiching Jubilee House | Ramara Library |
| Dress for Success | Rescue Lake Simcoe |
| Georgian College | Salvation Army |
| Gilda's Club Simcoe Muskoka | Seasons Centre for grieving children |
| Green Haven | Sharing Place Food Bank |
| Helping Hands | Simcoe County District School Board |
| Hill House Hospice | Simcoe Muskoka Family Connexions |
| Hillcrest Lodge | St Andrew's Presbyterian Church |
| Hospice Orillia | St James Anglican Church |
| Independent Living Services | St Paul's Centre |
| Information Orillia | St Vincent de Paul |
| Kidney Foundation | Toronto Humane Society |
| Lakehead University | United Way Simcoe Muskoka |
| Lighthouse Christian Ministries | World Vision |
| Mariposa House Hospice | YMCA |
| Mother Daughter Empower | Youth Haven |



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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 need and the need of the community.

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