



THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA



Annual Report 2018





Message from the Chairman of the Board

The Community Foundation of Orillia and Area had another outstanding year in 2018. 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 almost \$1,200,000 in new funds! This growth was driven by the establishment of 2 new funds (St Paul's Managed Fund and Jim & Ruth Watt Fund), and additional contributions to several existing funds. As of the end of 2018, our portfolio is over \$6.0 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 -2% in 2018 during very turbulent market conditions. 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 \$216,000 worth of grants to 50 local charities. That brings our total granting since 1999 to over \$1.2 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 2018 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 2018-19 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

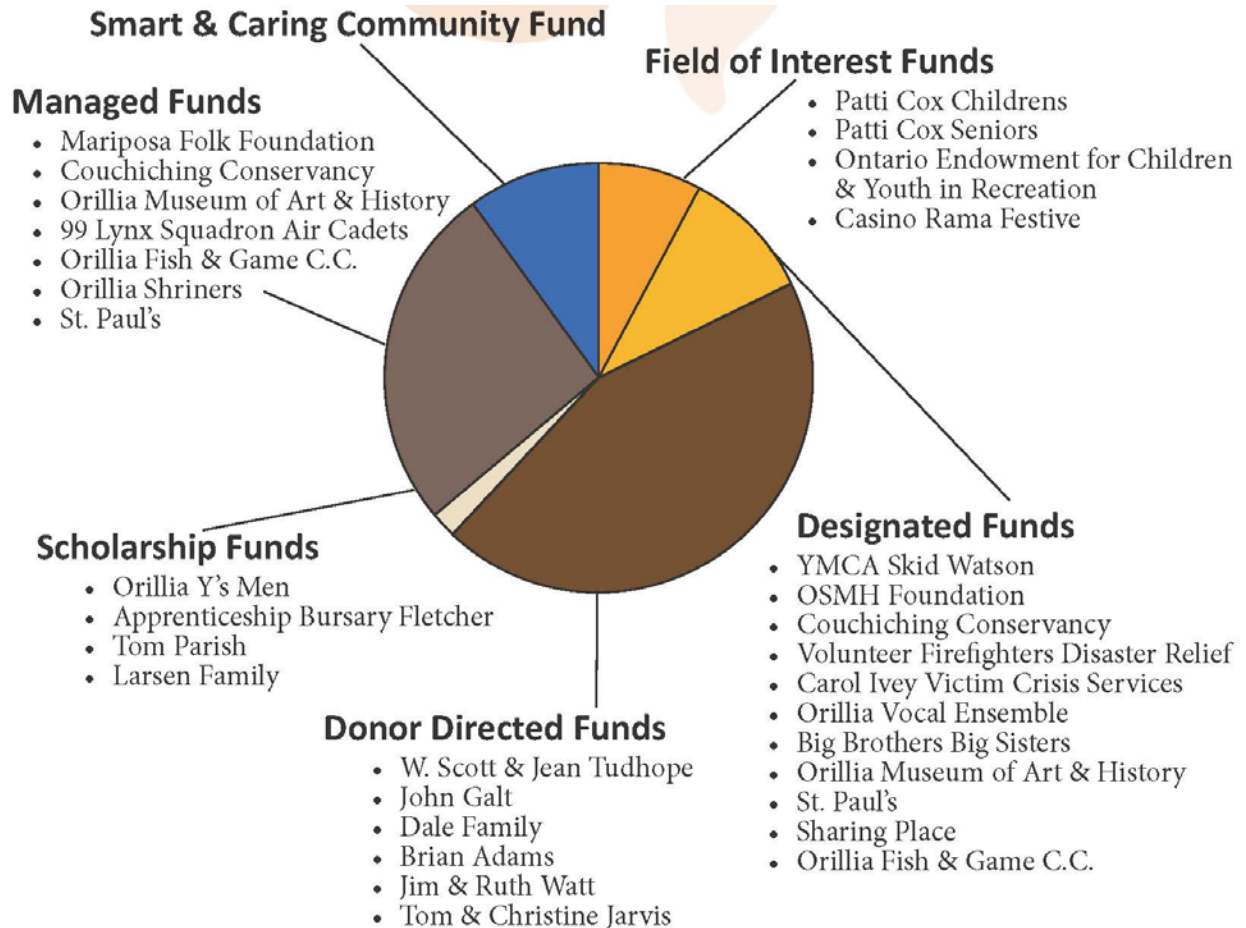
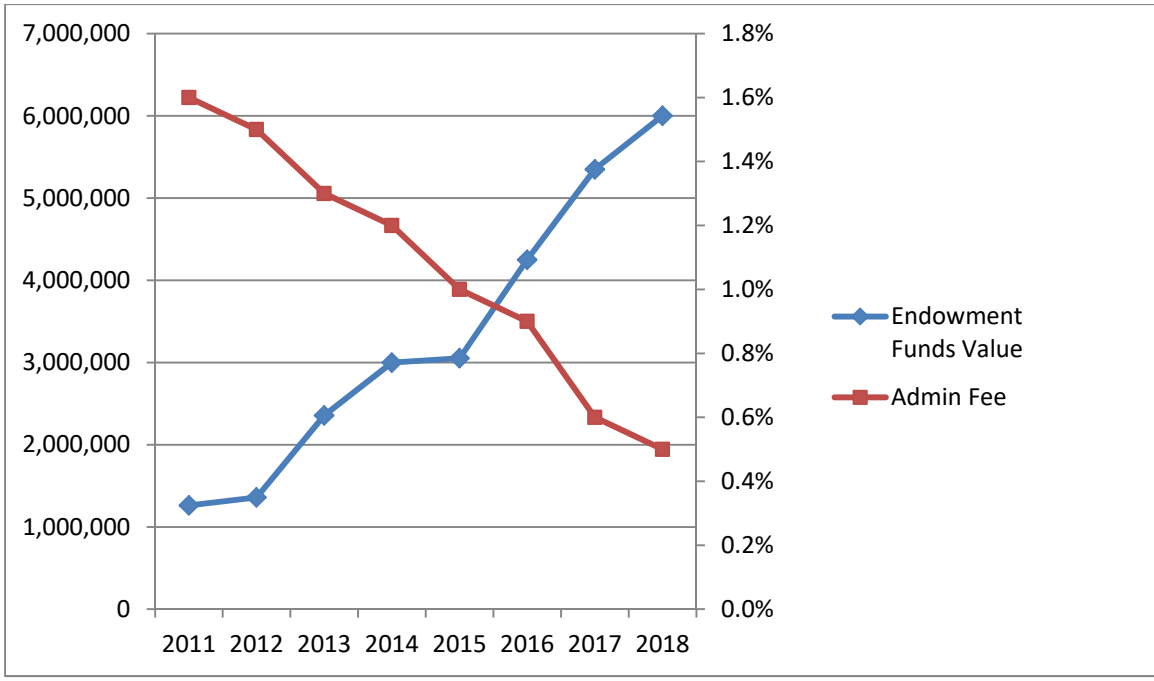
Professional Management

Investment Management

Connor, Clarke & Lunn
BMO Nesbitt Burns
RBC Dominion Securities

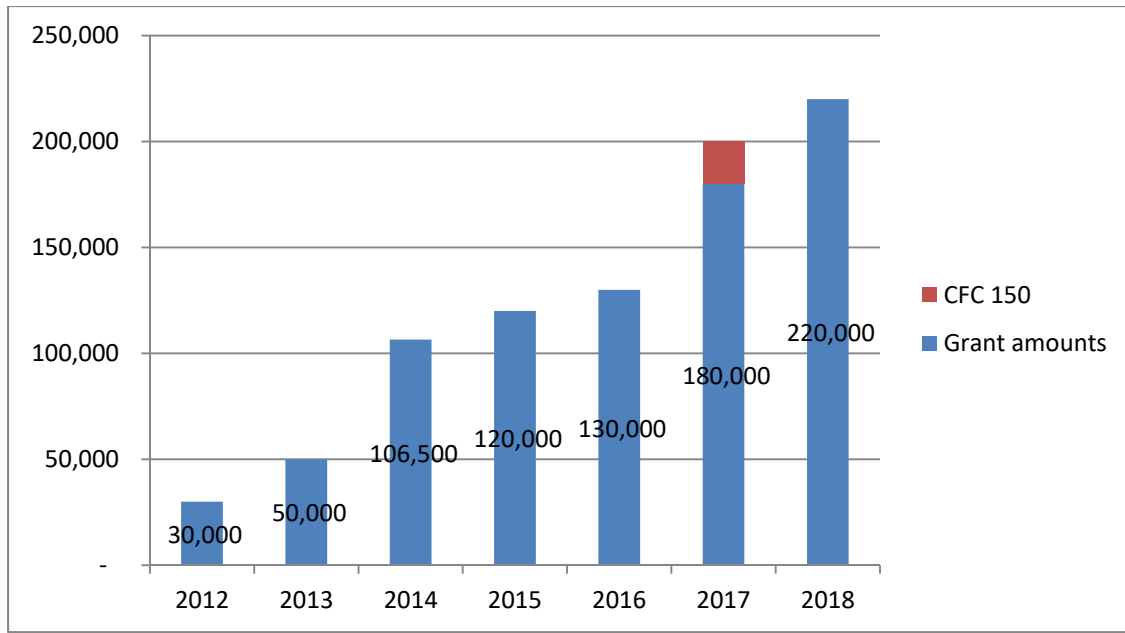
Auditor

Ben T. Cole Professional
Corporation





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Granting in 2018

Since 1999, the Community Foundation has granted more than \$1,200,000 to over 120 organizations in our community including the following organizations in 2018:

Aspen Valley Wildlife Sanctuary	Nature Conservancy of Canada
Big Brothers Big Sisters	North Simcoe Victim Crisis Services
Camp Couchiching	Ontario Humane Society
Canadian Dogs for the Blind	Ontario Nature
Canadian Red Cross Society	Orillia District Arts Council
Canadian Wildlife Federation	Orillia Fish & Game Conservation Club
Child Advocacy Centre	Orillia Museum of Art & History
Coldwater Canadiana Museum	OSMH Foundation
Comfie Cat Shelter	Orillia Youth Centre
Couchiching Conservancy	Orillia Youth Symphony Orchestra
Couchiching Jubilee House	Orillia Vocal Ensemble
Early Years Centre Simcoe North	Royal Victoria Hospital
Eat Well to Excel	Salvation Army
Emmanuel Baptist Church	Sharing Place Food Bank
Georgian College	Simcoe Community Services Foundation
Gilbert Centre	St Andrew's Presbyterian Church
Gilda's Club	St James Anglican Church
Green Haven	St Paul's Centre
Hill House Hospice	St Vincent de Paul
Horse Sanctuary	Toronto Humane Society
Information Orillia	Uptergrove P.S.
Kids For Turtles	World Vision Canada
Kiwanis Orillia	YMCA
Lakehead University	99 Lynx Squadron Air Cadets
Lighthouse Christian Ministries	
March of Dimes	



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