

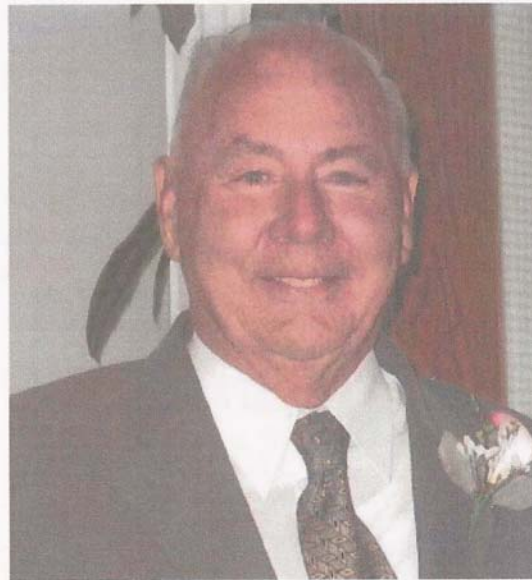


THE COMMUNITY
FOUNDATION
OF ORILLIA AND AREA



Annual Report 2019

*In Loving Memory Of
William Scott Tudhope*



1928 - 2019



Message from the Chairman of the Board

In 2019, the Community Foundation of Orillia and Area celebrated the 20th anniversary of our founding and mourned the passing of Scott Tudhope. The Scott & Jean Tudhope Fund was our first Donor Directed Fund and their generous philanthropic vision will have an enormous positive impact on the local charities that it supports forever.

Internally, 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 \$1,500,000 in new funds! This growth was driven by additions to our existing Donor Directed, Managed and Designated Funds and the establishment of 2 new Designated Funds (Leacock Associates and Orillia Youth Centre). As of the end of 2019, our portfolio is over \$8.0 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 over 14% in 2019. 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 in 2019, we granted \$240,000 to 50 local charities. That brings our total granting since 1999 to over \$1.4 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 2019 to receive a \$6,000 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 2019-20 Board of Directors

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

Investment

Chris Hazel: Chair
Lisa Ferry
Michael Gordon
Tom Jarvis
Glenn Meeuwisse
Bill Swinimer

Community Grants

Trevor Walker: Chair
Michael Davenport
Kim Goggins
Don Haskins
Jodi Lloyd
Anna Proctor
Charles Sheppard
Kathy Webb

Professional Management

Investment Management

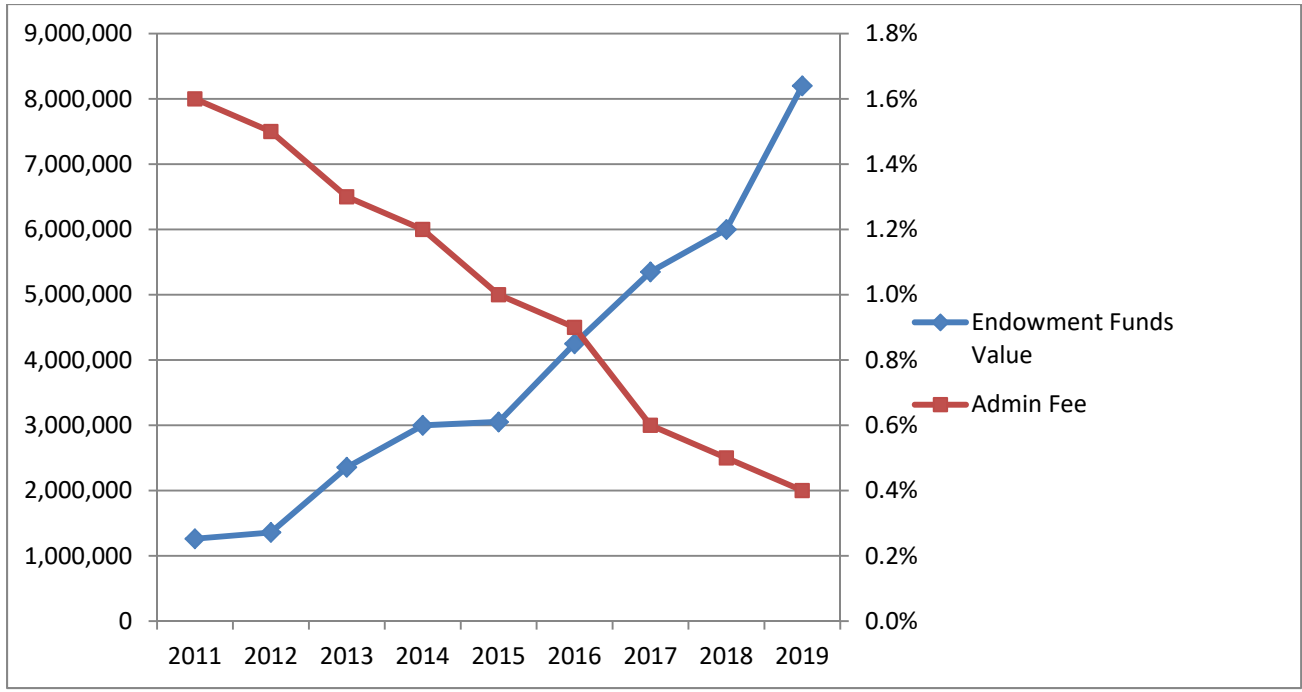
Connor, Clark & Lunn
BMO Nesbitt Burns
RBC Dominion Securities

Auditor

Ben T. Cole Professional
Corporation



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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

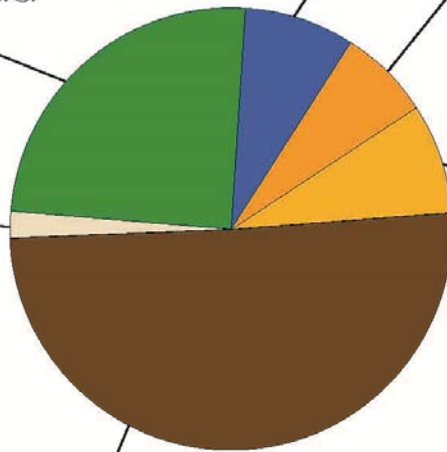
Smart & Caring Community Fund

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

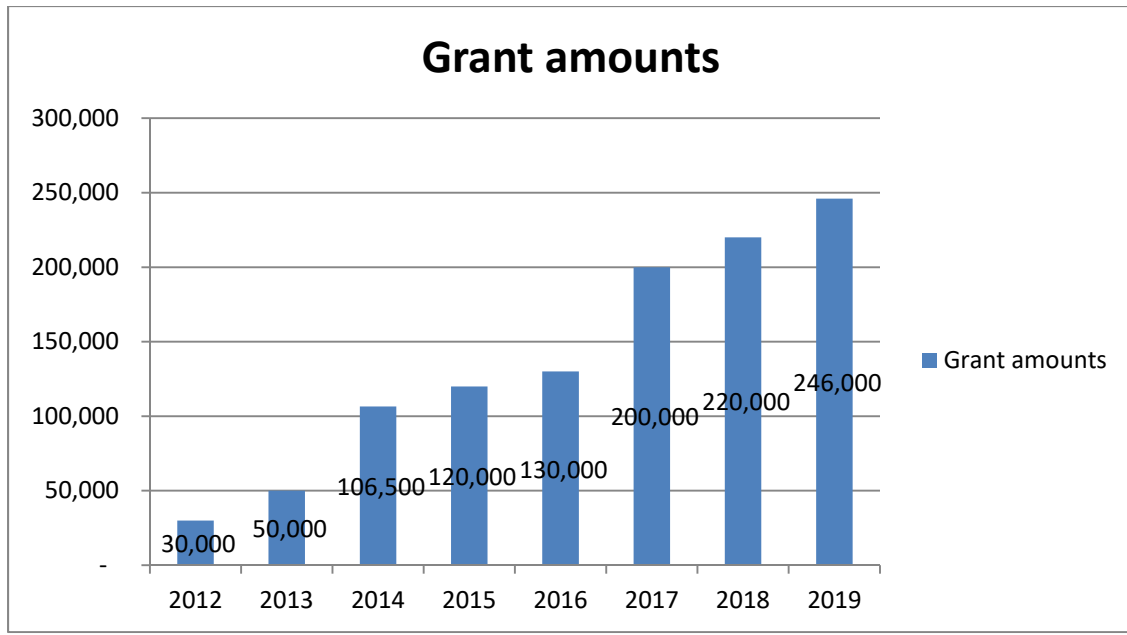


Designated Funds

- 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

Donor Directed Funds

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



Granting in 2019

Since 1999, the Community Foundation has granted more than \$1,450,000 to over 150 organizations in our community including the following organizations in 2019:

- | | |
|-------------------------------------|---------------------------------------|
| Action CIND | Orillia Concert Band |
| Big Brothers Big Sisters | Orillia District Arts Council |
| Camp Couchiching | Orillia Fish & Game Conservation Club |
| Canadian Red Cross Society | Orillia Museum of Art & History |
| Catholic Family Services | Orillia Public Library |
| Child Advocacy Centre | OSMH Foundation |
| Couchiching Conservancy | Orillia SPCA |
| Couchiching Jubilee House | Orillia Youth Centre |
| Dress for Success | Orillia Youth Symphony Orchestra |
| Early Years Centre Simcoe North | Orillia Vocal Ensemble |
| Georgian College | Ramara Historical Society |
| Gilda's Club | Salvation Army |
| Green Haven | Scientists in School |
| Horse Sanctuary | Seasons Centre for Grieving Children |
| Independent Living Services | Seniors Wish Association |
| Information Orillia | Sharing Place Food Bank |
| Kiwanis Music Festival Orillia | Simcoe County District School Board |
| Lakehead University | St Andrew's Presbyterian Church |
| Living for Jesus | St James Anglican Church |
| Lighthouse Christian Ministries | St Paul's Centre |
| Mariposa House Hospice | St Vincent de Paul |
| Nature Conservancy of Canada | Toronto Humane Society |
| North Simcoe Victim Crisis Services | YMCA |
| Ontario SPCA | 99 Lynx Squadron Air Cadets |
| Ontario Winter Games 2020 | |



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NOTES:



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**THE COMMUNITY
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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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