



## Annual Report 2020





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

In 2020, despite all of the disruption from COVID-19, the Community Foundation of Orillia had an outstandingly 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 us to do any fundraising for our operating costs, we were able to continue our 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 \$2,200,000 in new funds! This growth was largely driven by a donation from the Estate of Scott Tudhope along with additions to our existing Donor Directed, Managed and Designated Funds. As of the end of 2020, our portfolio is over \$10.8 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 13% in 2020 despite challenging 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 in 2020, we granted over \$400,000 to over 50 local charities. That brings our total granting since 1999 to over \$1.8 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 2020 to receive a \$8,000 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 2020-21 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

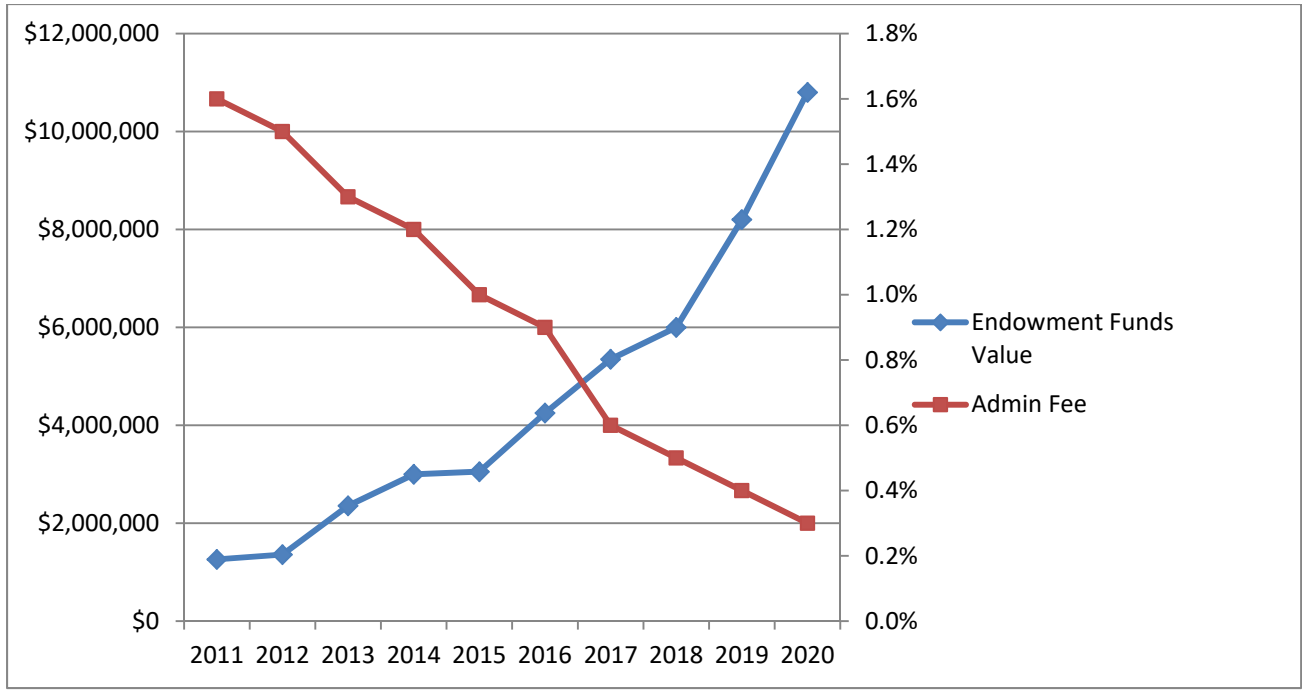
Connor, Clark & Lunn  
BMO Nesbitt Burns  
RBC Dominion Securities

##### Auditor

Ben T. Cole Professional  
Corporation



THE COMMUNITY  
FOUNDATION  
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

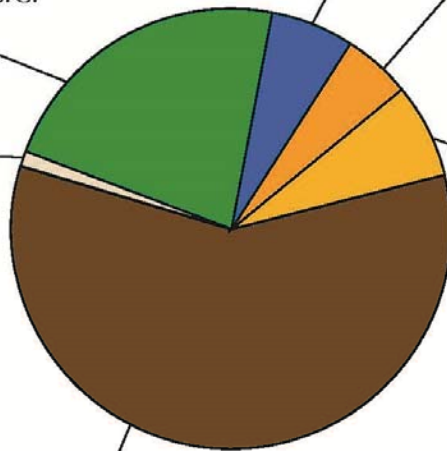
**Smart & Caring Community Fund**

**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**

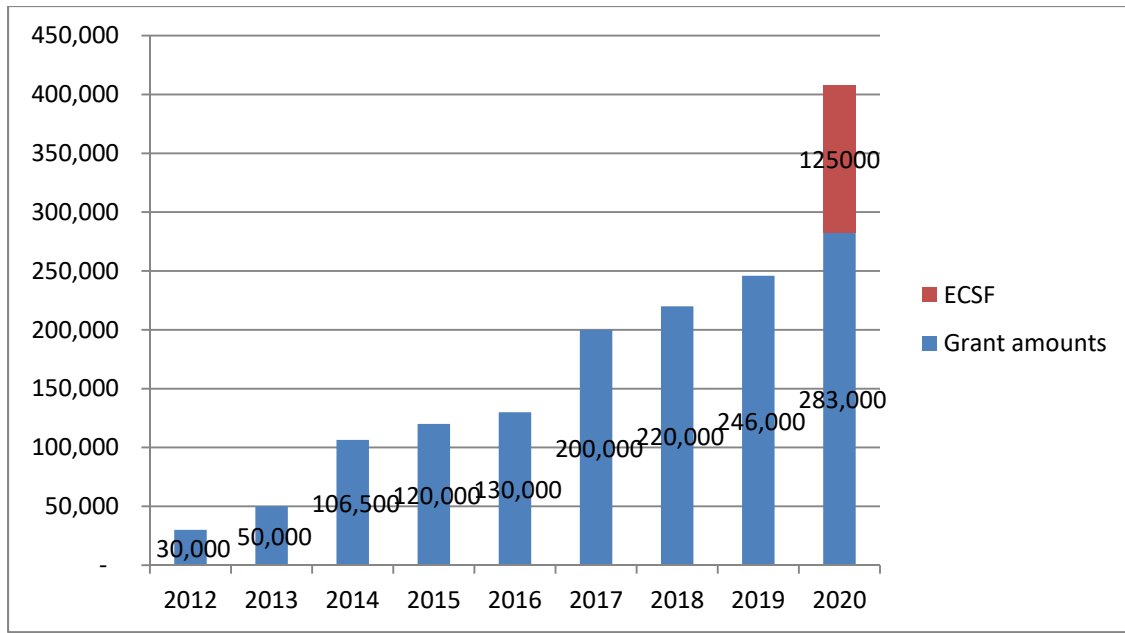
- YMCA Skid Watson
- OSMH Foundation
- Couchiching Conservancy
- Volunteer Firefighters Disaster Relief
- Carol Ivey Victim Crisis Services
- Orillia Vocal Ensemble
- Big Brothers Big Sisters
- Orillia Museum of Art & History
- St. Paul's
- Sharing Place
- Orillia Fish & Game C.C.
- Stephen Leacock Associates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

**Donor Directed Funds**

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



THE COMMUNITY  
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### Granting in 2020

Since 1999, the Community Foundation has granted more than \$1,850,000 to over 150 organizations in our community including the following organizations in 2020:

- |                                   |                                       |
|-----------------------------------|---------------------------------------|
| Alzheimer Society                 | Nature Conservancy of Canada          |
| Big Brothers Big Sisters          | North Simcoe Victim Crisis Services   |
| Camp Couchiching                  | Ontario SPCA                          |
| Canadian Guide Dogs for the Blind | Orillia Fish & Game Conservation Club |
| Canadian Red Cross Society        | Orillia Museum of Art & History       |
| Comfie Cat Shelter                | OSMH Foundation                       |
| Couchiching Conservancy           | Orillia SPCA                          |
| Couchiching Jubilee House         | Orillia Youth Centre                  |
| Diabetes Canada                   | Orillia Vocal Ensemble                |
| Dress for Success                 | Relay Education                       |
| Emmanuel Baptist Church           | Salvation Army                        |
| Georgian College                  | Scientists in School                  |
| Gilda's Club Simcoe Muskoka       | Sharing Place Food Bank               |
| Green Haven                       | Simcoe County District School Board   |
| Guardian Angels                   | St Andrew's Presbyterian Church       |
| Hill House Hospice                | St James Anglican Church              |
| Horse Sanctuary                   | St Paul's Centre                      |
| Kidney Foundation                 | St Vincent de Paul                    |
| Kids for Turtles                  | Toronto Humane Society                |
| Lakehead University               | World Vision                          |
| Lighthouse Christian Ministries   | Youth Haven                           |
| March of Dimes                    | YMCA                                  |
| Mariposa House Hospice            | 99 Lynx Squadron Air Cadets           |



THE COMMUNITY  
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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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