



THE COMMUNITY  
FOUNDATION  
OF ORILLIA AND AREA

# Annual Report 2024





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

In 2024, the Community Foundation of Orillia had a very solid 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 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 almost \$1,600,000 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 2024, our portfolio is over \$24.0 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 14.7% in 2024 during a great 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 2024, we granted over \$575,000 to over 50 local charities. That brings our total granting since 1999 to over \$3.6 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 2024 to receive a \$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 2024-25 Board of Directors**

Michael Gordon, President  
Chris Hazel, Vice-President  
Chris Holtved, 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  
Don Haskins  
Jodi Lloyd  
Kathy Webb

## **Professional Management**

### **Investment Management**

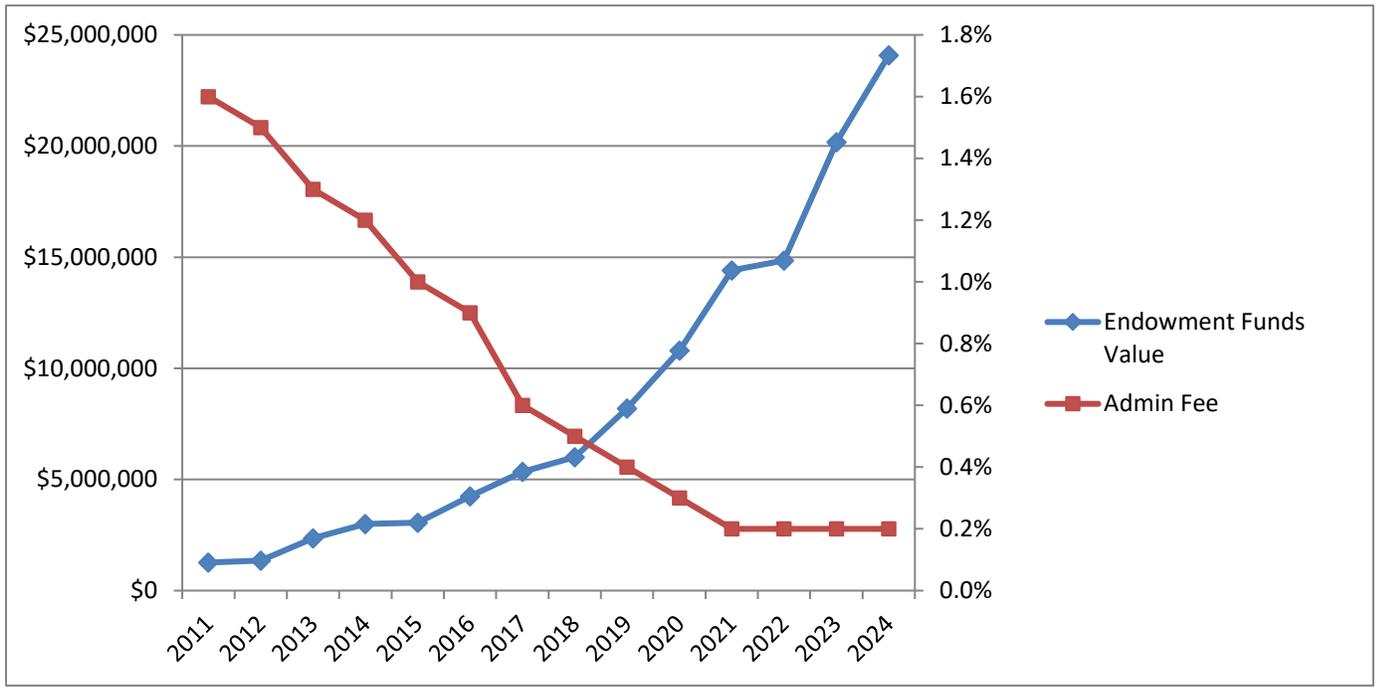
Connor, Clarke & Lunn  
BMO Nesbitt Burns  
RBC Dominion Securities

### **Administration**

Orillia Area Community Development Corp.

### **Auditor**

Hehn Trickey Professional Corporation



**Managed Funds**

- Mariposa Folk Festival
- 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

**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
- Dykes Family
- Varty Family
- Annalynn Faulkner

**Smart & Caring Community Fund**

**Field of Interest Funds**

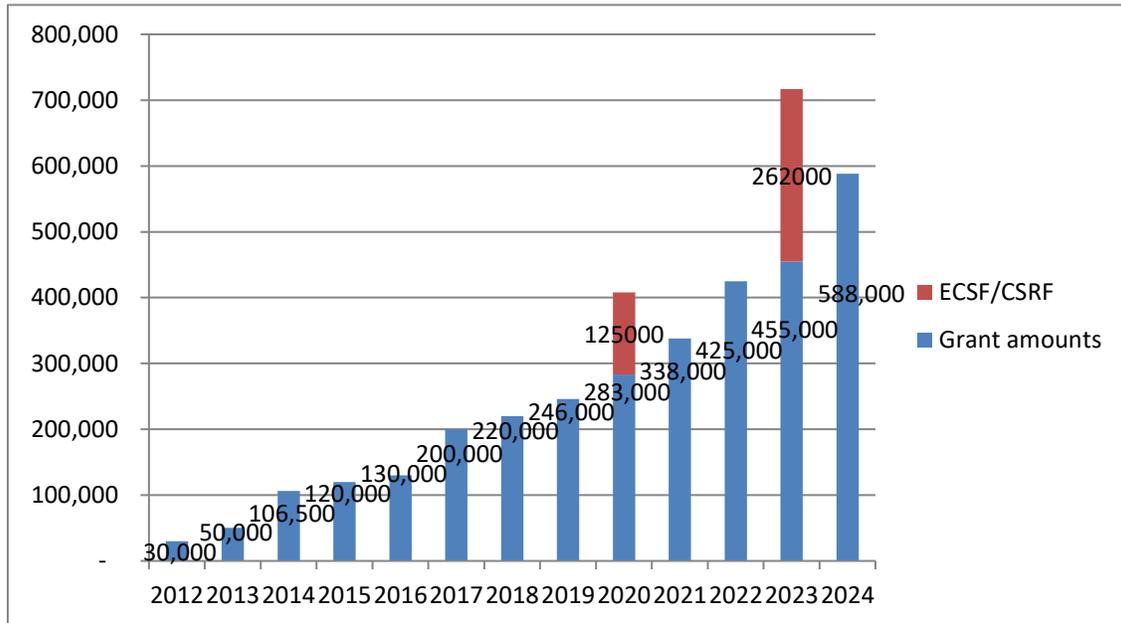
- Patti Cox Childrens
- Patti Cox Seniors
- Ontario Endowment for Children & Youth in Recreation
- Casino Rama Festive

**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



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### Granting in 2024

Since 1999, the Community Foundation has granted more than \$3,600,000 to over 150 organizations in our community including the following organizations in the past year:

- |  |                                       |
|--|---------------------------------------|
| Alzheimer Society                            | Ontario SPCA                          |
| Arts Orillia                                 | Orillia Concert Band                  |
| Big Brothers Big Sisters                     | Orillia Fish & Game Conservation Club |
| Born to Read                                 | 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                  |
| Couchiching Conservancy                      | OSMH Foundation                       |
| Couchiching Jubilee House                    | Parkinsons Canada                     |
| Empower Simcoe                               | Rainbows for All Children Canada      |
| Georgian College                             | Ramara Township Public Library        |
| Gilbert Centre                               | Rescue Lake Simcoe                    |
| Green Haven                                  | Salvation Army                        |
| Helping Hands                                | Seasons Centre for grieving children  |
| Hill House Hospice                           | Seven South Street Treatment Centre   |
| Hillcrest Lodge                              | Sharing Place Food Centre             |
| I Challenge Diabetes                         | Simcoe County District School Board   |
| Independent Living Services                  | St Andrew's Presbyterian Church       |
| Information Orillia                          | St James Anglican Church              |
| Kiwanis Club of Orillia                      | St Paul's Centre                      |
| Lakehead University                          | St Vincent de Paul                    |
| Lighthouse (Orillia Christian Centre)        | Telecare Distress Line                |
| March of Dimes                               | The Cellar Singers                    |
| Mariposa Arts Theatre                        | Toronto Humane Society                |
| Mariposa House Hospice                       | United Way Simcoe Muskoka             |
| Nature Conservancy of Canada                 | World Vision                          |
| North Simcoe Hospice Palliative Care Network | YMCA                                  |
| North Simcoe Victim Crisis Services          |                                       |



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NOTES:



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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.*

P.O. Box 622, 22 Peter Street South, Orillia, Ontario, L3V 7A3  
info@communityfoundationorillia.ca • 705-325-4903 x 207  
[www.communityfoundationorillia.ca](http://www.communityfoundationorillia.ca)