

# 2015 ANNUAL REPORT

helping good people build smart and caring communities



NIAGARA  
COMMUNITY FOUNDATION

[niagaracommunityfoundation.org](http://niagaracommunityfoundation.org)

# OUR VISION

Realizing community dreams through philanthropy.

# OUR MISSION

The Niagara Community Foundation improves the quality of life in Niagara through philanthropy.

# OUR GUIDING PRINCIPLES

## **ENABLE, COLLABORATE AND TRANSFORM:**

Enable community improvement by providing funding and community knowledge. Bring organizations together to form partnerships based on the respective strengths of each organization to focus on key community priorities.

## **DEMONSTRATE PHILANTHROPIC LEADERSHIP:**

Demonstrate expertise and best practice in philanthropic leadership.

## **PUT NIAGARA FIRST:**

Communicate and support the Niagara story. Build community leadership. Seek and develop individuals who will bring leadership to the community.

## **BE TRUSTWORTHY AND TRANSPARENT:**

Engage in practices that are open, accessible, fair, objective, flexible, timely and built on a foundation of respect, trust, integrity and honesty.

## **ENSURE SOUND GOVERNANCE AND MANAGEMENT:**

Ensure that the Niagara Community Foundation governance and management is sound, relevant and realizes its full fiduciary responsibility.

# EXECUTIVE MESSAGE



Liz Palmieri  
*Executive Director*



Madeline Woodhead  
*Board Chair*

It's not until we bring all the sections of the Annual Report together that we have a sense of the Foundation's many accomplishments and the scope of our impact. It truly has been another incredible year.

Throughout the year the board and staff worked closely on the implementation of the new three year strategic plan, which was developed through the guidance, input and feedback of many of our donors, volunteers, grant beneficiaries and community leaders. You'll read on the next page some of the highlights and accomplishments in 2015.

One of the main priorities for the year was to recruit a new Executive Director due to Liz's retirement in May 2016. Through a very thorough, professional and transparent process Bryan Rose has been recruited to start near the end of April. And to assist with the transition, Liz will be on a monthly retainer for six months.

In 2015 we granted \$1.47 million, the largest amount since our launch. Please take some time to read the stories of some of our community grants, starting on page 6, and also to review the list, on page 16, of charities supported by our donor directed grants. Through these grants our vision 'realizing community dreams through philanthropy' comes alive. The funds supporting these grants can be found starting on page 24.

And please take some time to check out the last few pages of the report where you'll see our volunteers and supporters acknowledged. Our success, for which we are extremely grateful, would not be possible without these people and organizations.

This is the last Executive Message that we will be writing as a team. We've both truly enjoyed working together with our board and staff leading this incredible organization to bigger and better things.

Madeline Woodhead, Board Chair  
Liz Palmieri, Executive Director

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# PRIORITIES, STRATEGIES, PLANS

## HIGHLIGHTS

After a year of consultation and development, our new three-year strategic plan was implemented in 2015. Here's what we accomplished:

- Awarded \$1.47 million in grants, an increase of 35% which brought the total amount granted since 2001 to \$8.4 million
- Approved 12 new endowment funds bringing total endowments to \$26.5 million, representing a 7.8% increase
- Developed a new relationship with the True Sport Foundation, facilitating the Foundation supporting sports organizations which adopt the true sport principles
- Transferred Cuvée to Brock University's Cool Climate Oenology and Viticulture Institute
- Implemented new strategic plan for 2015 – 2017
- Worked with 8 charities on the implementation of the Legacy Partners Program
- Developed new policy to guide our public policy and advocacy work
- Undertook succession planning process in light of the retirement of the Executive Director in May 2016
- Researched, developed and approved creation of the Centre of Excellence in Non Profit Governance with launch taking place in January 2016
- Approved a new initiative with a goal to create 150 new endowments in celebration of Canada's 150th anniversary
- Increased operational efficiencies by implementing enhanced electronic banking services and piloting on-line grant application and review software

We realize that collaborative partnerships with funders and other organizations will go a long way toward ensuring that our grant recipients, their clients and our donors receive quality service and support from the Foundation. Here are some examples of how the Foundation has partnered with others:

### Niagara Neighbourhood Good Idea Fund

The Foundation partnered with the United Way and the Trillium Foundation, pooling their financial resources to develop a small grants program to support innovative projects at the neighbourhood level.

### Niagara Prosperity Initiative

The Niagara Prosperity Initiative (NPI), funded by Niagara Region, is a partnership of public, private and voluntary organizations working to reduce poverty in Niagara. In 2015, funding was renewed to support the position of Convener enabling us to bring organizations together to share resources, implement best practices and collaboratively access funds to support a variety of poverty-reduction initiatives, including community gardens across Niagara. Staff from the Foundation also assisted with the review of the grant applications for \$1.2 million in NPI funding from the Region.

### Niagara Connects

The Foundation has been a partner with this project since the organization's inception. Niagara Connects, a Niagara-wide network for collaboration, planning, learning, innovation and community action toward a stronger future for Niagara, has four core products: Living in Niagara Report, Niagara Knowledge Exchange, Niagara Community Calendar and Linking Niagara.

### External Investment Managers Program

The Foundation is always looking for new ways to help donors in achieving their philanthropic goals and to work with professionals in the financial, estate and investment world in mutually beneficial relationships. In 2012, the Foundation created the External Investment Managers Program which allows assets gifted to a newly created fund to be invested outside of Foundation's Consolidated Investment Fund in a portfolio managed by the donor's recommended investment firm. This program is available for advisors who have been licensed as a portfolio manager actively involved in discretionary investment management of segregated portfolios for a minimum of 3 years. The minimum donation required for a fund manager to participate in this program is \$1,000,000. Gifts under this amount will be considered on a case-by-case basis. There are currently four portfolio managers participating in this program.

## FINANCIAL HIGHLIGHTS:

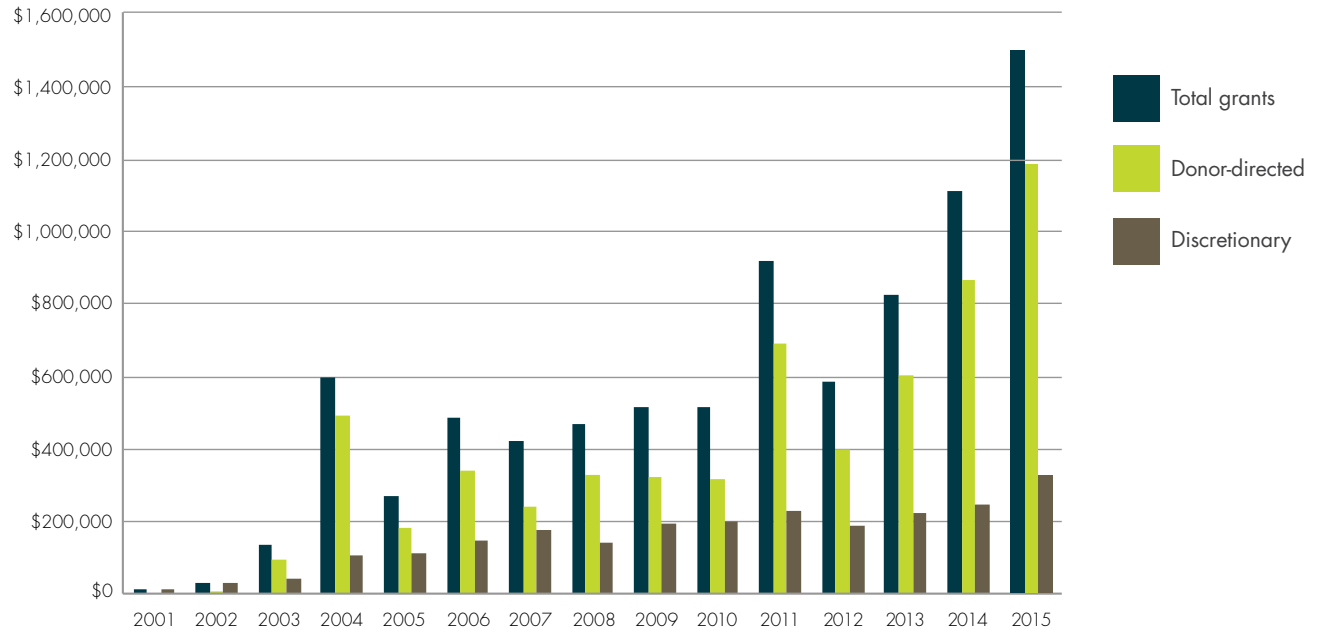
**GIFTS RECEIVED:** \$852,811

**GRANTS AWARDED:** \$1,473,494

**GROWTH IN ASSETS:** 4%

**OPERATING EXPENSES:** (excluding special projects and fundraising) 1.39% of assets

### GROWTH IN GRANTS 2001 - 2015





# GRANTS enable community dreams

## DRAWING YOUR WAY TO A BETTER STATE OF MIND

### COMMUNITY LIVING PORT COLBORNE-WAINFLEET

It's incredible – the connection between art and mental health. Support staff at Community Living Port Colborne-Wainfleet saw it first hand when they provided 10 weeks of art therapy to groups of youth with developmental and intellectual disabilities.

Young people between the ages of 6 and 21 who put paint brush to paper in the program said doing art made them feel better. Parents also noticed positive changes in their children. They saw they could better cope with difficult situations, drawing out their feelings on paper. They noticed greater self-confidence in their children, too.

There was no doubt among organizers, either, that art therapy was working, particularly in cases where other types of therapy hadn't had much success. They saw participants learn new skills and better express their feelings. These same young people were also more willing to participate in other activities offered by Community Living.

This was all accomplished with the help of a \$2,500 grant from the Niagara Community Foundation, money that enabled Community Living to hire a trained art therapist who not only brought out the best in participants but inspired support staff to continue using some form of art therapy with youth every day.

Art therapy will continue to be provided to groups or one-on-one by Community Living, which knows that access to mental health support when people are young increases the chances of good mental health in the future.

## **CARING AND COMMUNITY- BUILDING THROUGH SPORT**

### **TRUE SPORT PARTNERSHIP**

There's no doubt about the power that sport and recreation activities can have within a community. They help people build friendships and develop our next generation of leaders while fostering a spirit of teamwork, a love of the outdoors, and a sense of belonging. Yet for all the community connections that sport and recreation organizations create, they've historically been unable to access community foundation grants because they haven't qualified as recipients.

The Niagara Community Foundation is changing that. In 2015, the Foundation allocated \$10,000 to the Smart & Caring True Sport Matching Grants Program, funding sports and recreation groups in the region.

That money was matched by the McConnell Foundation in partnership with the True Sport Foundation. All in, it's enabled the Foundation to support four grants: Growing Up Through Sports (\$3,000); Niagara Cricket Club (\$4,000); Niagara Sport Commission (\$7,050); and S'COOL Mission (\$2,500).

Going forward, the Foundation intends to integrate True Sport, with its principles of inclusion, fair play, respect, striving for excellence, having fun and giving back, into its annual granting program starting in 2016 — a win for everyone.

### **NIAGARA FALLS ART GALLERY**

The Niagara Falls Art Gallery has recreated the art studio of one of Canada's most renowned artists — allowing visitors to see the space where William Kurelek painted, and which, ultimately, may have contributed to his death.

The small structure, only four feet by six feet, was built by Kurelek in the 1960s in the basement of his Toronto home, and was intended to serve as a bomb shelter for the nuclear war which Kurelek believed was imminent. His family donated the studio to the Niagara Falls Art Gallery in 2010, and it was moved to Niagara in pieces. A \$3,250 grant from the Niagara Community Foundation helped to offset the \$9,000 cost of re-assembling it for display, including interpretive signage.

Visitors can now see the windowless, airless room, where Kurelek toiled, inhaling the toxic paint fumes which are believed to have led to the liver cancer that claimed his life in 1977 at only 50 years of age.

The studio, which opened to the public in October 2015, "enhances visitor understanding of this unique artist" and has already attracted renewed visitor interest and attention.

## **ARTIST'S STUDIO TAKES SHAPE IN GALLERY DEDICATED TO HIS WORK**



## EPILEPSY NIAGARA

Improving the well-being of those living with epilepsy starts with tackling poor diets and other health habits that need improvement. Epilepsy Niagara knows healthy food and safe exercise can mean fewer and shorter seizures for people living with the disease. That's why in 2015 it began hosting cooking demonstrations and lessons in grocery shopping on a budget.

### THE KITCHEN CONNECTION TO GOOD HEALTH

Participants learned about stretching their dollars at the grocery store, and about proper portioning and freezing to stretch their meals at home. They were also given timed appliances, including slow cookers, microwaves and toaster ovens, to use at home in exchange for volunteer hours. Such appliances offer a safe way to cook. Should someone suffer a seizure while making a meal, the appliances would automatically shut off when the set cooking time elapsed.

Cooking classes were spread over five sessions for one to five people at a time, and were held in the kitchen at the organization's headquarters or in clients' homes.

It wasn't long before participants began offering their own recipes and money-saving tips, which have been compiled in a cookbook for others to use.

With the help of a \$3,000 grant from the Niagara Community Foundation, Epilepsy Niagara developed an innovative approach to help more Niagarans live healthier, more independent lives. The program has become a fixture in Epilepsy Niagara's repertoire of support services, so more people can benefit from these important skills.



TEENAGERS GET  
BETTER TOOLS  
**FOR RESUMES  
AND JOB  
SEARCHES**

## FOUNDATION OF RESOURCES FOR TEENS (FORT)

West Niagara teenagers have access to better computers, scanners and monitors, thanks to a one-time \$9,000 grant from the Niagara Community Foundation. The new technology at three youth drop-in centres, is giving teenagers better tools for homework, tutoring, resume writing and job searches. The grant also included three new computers for FORT employees, allowing staff to be more productive and efficient.

With better computers, the drop-in centres in Grimsby, Smithville and Caistor Centre are seeing a boost in both attendance and youth engagement, and parents are glad to have their teenagers using the technology in a social setting, said the FORT.

In fact, the improvement was so dramatic, it even had one unintended consequence. The old computers were “embarrassingly outdated,” but the new ones are so good the teens are now arguing about who gets access. “We take this as an indicator of the project’s success.”

## FACS - DADDY AND ME

Niagara fathers who are only allowed to see their children under supervision are getting help and encouragement in a new program started with the help of a grant from the Niagara Community Foundation.

The “Daddy and Me” program, operated by Family and Children’s Services Niagara, gives fathers quality time with their young children: singing songs, playing games and making crafts.

A \$2,000 grant from the Foundation allowed FACS to buy toys, art supplies, craft supplies, an art easel, a water table and snacks to equip the program that gives fathers positive, nurturing experiences with their children.

The “Daddy and Me” program targets those fathers who are struggling to recognize the development of their infants and those fathers who are working towards having their children returned to them. A partnership with Niagara Region Public Health brought in guest speakers and teachers.

“We served fathers who showed an interest in their child’s development but who needed a chance to learn about the physical and emotional well-being of a child,” said Chris Walker from FACS. The start-up was highly successful and will be continued with funding from FACS and the FACS Foundation.

**FATHERS GET  
ENCOURAGEMENT  
AND SUPPORT**

## NATURAL BEAUTY DELIVERS COMMUNITY SAFETY

### PARKS IN THE CITY

Warren Woods Trail is more than a pretty place to go for a stroll in Niagara Falls. Newly planted trees along the pathway give its beauty a practicality that will benefit residents for years to come. Those trees also serve to protect nearby properties from storm surges and flooding along the stream bed that cuts a swath through the area.

The greatest effects of the Warren Woods Trail tree planting project, led by the City of Niagara Falls' Park in the City Committee with a grant from the Niagara Community Foundation, won't be felt for another 10 to 15 years when the trees mature. Still, residents closest to the trail will be safer every year in the meantime from the ebb and flow of water in the stream, thanks to the work of volunteer tree planters, including a group from Greater Niagara General Hospital.

The project has inspired the planting of more trees in Niagara Falls' green spaces. Warren Woods Land Corporation, which is building a sustainable mixed community in the city's south end and which also contributed financially to the Warren Woods Trail project, was so impressed with the results that it hopes to continue a tree-planting partnership with the committee.

It's incredible what's grown from the \$5,062 granted to the project by the Niagara Community Foundation: a beautiful and safer community, and one inspired to continue improving the environment in Niagara.

### ROSE COTTAGE VISITING VOLUNTEERS

Living with or caring for someone with a life-limiting illness can be a lonely and frightening journey, but a successful program in West Niagara gives people and their caregivers a place to go for companionship and support.

The Rose Cottage Visiting Volunteers Drop-In Centre at Mountainview Christian Reformed Church is a twice-monthly chance for residents of West Niagara to meet experts and others with similar experiences.

Thanks to a partnership with the Alzheimer Society's Brain Wave Café, participants can get answers to their questions, share their experiences and participate in healthy brain activities. The drop-in centre, re-launched in September 2015, has seen hundreds of people take advantage of the caring and friendship it provides, with word of mouth drawing new people each session.

A \$4,000 grant from the Niagara Community Foundation enabled the Rose Cottage Visiting Volunteers to revive a version of a day program that had originally run from 2008-2012. The grant paid for refreshments, speakers and a coordinator. It operates from 1:30 to 3:00 p.m. on the first and third Thursday of the month, at a church that is accessible and conveniently located. Rose Cottage coordinators and volunteers are on hand to facilitate the conversations and activities and to provide refreshments.

"We've heard that this is such a sanctuary, especially for caregivers," said executive director Sherry Cain. "It's such a welcome break and we know there is such a need."

## SOCIAL CONNECTIONS AND ANSWERS TO QUESTIONS



## HEALTHY AGING FOR LGBTQ+ SENIORS

### QUEST COMMUNITY HEALTH

A one-year study of the unique health issues of lesbian, gay, bi-sexual and transgender seniors in Niagara will be used to develop programs and services to better meet their needs.

The environmental scan, which obtained input from close to 20 senior members of Niagara's LGBTQ+ community, will inform the priorities of the Niagara Aging Strategy, potentially influencing policy and service delivery to better serve aging LGBTQ+ individuals.

The scan was conducted in 2015 by Quest Community Health Centre, in partnership with Positive Living Niagara and with the assistance of a \$5,677 grant from the Niagara Community Foundation.

As a community health centre, Quest's mandate is to provide health care and health promotion to people in Niagara who don't have a doctor and who face barriers to care: seniors, people who are sexually and gender diverse, homeless or underhoused, or who face mental health or addiction issues.

As part of Niagara's aging population, many LGBTQ+ seniors may have lived through a time when their identities were not only medically pathologized but also considered immoral or illegal – making real or perceived stigma and discrimination possible barriers to health or social care. In addition to the face-to-face interviews, 42 community agencies provided input, with the majority expressing a strong desire to provide culturally appropriate services to the LGBTQ+ population.

Findings will be shared at the 2016 Rainbow Health Ontario conference.

# 2015 GRANTS AWARDED

From our Community, Mini, Environment, Summer Camp and Strategic Initiatives grant programs

For detailed information on our current granting priorities visit the grants section at [www.niagaracommunityfoundation.org](http://www.niagaracommunityfoundation.org)

|   |   |          |
|---|---|----------|
| Alzheimer Society of Niagara Region                                       | Create a new Tele-Care telephone program for the purpose of providing a support network and education to persons living with dementia.  | \$4,325  |
| Big Brothers Big Sisters of Niagara Falls                                 | Purchase equipment needed to expand the Go Girls, Healthy Bodies, Healthy Minds program to Niagara Regional Housing sites in Niagara Falls, St. Catharines and Smithville.      | \$500    |
| Big Brothers Big Sisters St. Catharines, Thorold and District             | Renovate and furnish the basement space used for safety training for volunteers and families.   | \$3,600  |
| Brock University - Youth University                                       | Purchase an Educational Math Kit to expand the Math Club program to youth at the Russell Avenue Community Centre.   | \$500    |
| Carousel Players  | Support the workshop of two plays adapted from children's books and work with the authors to present the plays to students in Niagara.  | \$4,000  |
| Choralis Camerata   | Purchase risers to be used and shared with partners across the Niagara Region.  | \$5,000  |
| City of Niagara Falls - Niagara Falls Museums                             | Support the services of a facilitator to bring together all cultural organizations in Niagara Falls to discuss the Cultural Plan and create path of moving forward.             | \$500-   |
| City of Niagara Falls - Niagara Falls Museums                             | Provide information to educate the community on the benefits of buying local and utilizing the Farmer's Market.   | \$500-   |
| City of Niagara Falls - The Park in the City Committee                    | In partnership with Park in the City Committee, students and developers, plant trees along the new Warren Woods Trail to create shade for residents and help stormwater surges. | \$5,062  |
| City of St. Catharines - Friends of Malcolmson Eco-Park                   | Revitalize the main north-south trail near Cumberland Avenue by filling valleys eroded by cyclists and replanting with native shrubs and trees.                                 | \$2,500  |
| Community Care of St. Catharines and Thorold (Niagara Nutrition Partners) | Create and mount signage for their new building and design posters for the schools hosting a student nutrition program.   | \$6,500  |
| Community Living - Fort Erie  | Pilot a support program for youth with intellectual disabilities from ages 15 to 21 years old.  | \$8,800  |
| Community Living - Fort Erie  | Purchase and install new signage on building to reflect new branding.   | \$500    |
| Community Living - Grimsby Lincoln & West Lincoln                         | Fund the printing of a cook book which is being created to start a social enterprise with profits directed to the clients who help create the book.                             | \$500^   |
| Community Living Port Colborne - Wainfleet                                | Provide health and wellness classes for people in the Three Bridges Neighbourhood at no cost along with free child care.  | \$1,700  |
| Community Living Port Colborne - Wainfleet                                | Pilot a group art therapy program to children and youth with special needs where regular therapy has been unsuccessful.   | \$2,500  |
| DSBN - Port Weller Public School  | Support the Leader in Me initiative which empowers young people to gain leadership skills.  | \$500    |
| Education Foundation of Niagara   | Purchase new accounting software to provide efficiencies and improve operations.  | \$410    |
| Fatih Tabernacle Pentecostal Assembly - Faith Welland Outreach            | Create and provide programming for adult residents at Birchwood Place and neighbourhood residents including cooking, crafts, exercise, woodworking, sewing, etc.                | \$5,000+ |
| Folk Arts Council of St. Catharines - Multicultural Centre                | Links for Greener Learning in collaboration with Niagara College will work to naturalize the terrestrial ecosystem found in Richardson's Creek and the Green Ribbon Trail.      | \$7,304  |
| Foundation of Resources for Teens (FORT)                                  | Purchase 13 computers for the drop in locations (Grimsby, Smithville and Caistor) to be used for youth homework, resume building and staff programming.                         | \$9,000^ |
| Friends Of Fort Erie's Creeks   | Purchase equipment for ongoing environmental restoration and maintenance projects and programs.   | \$3,750  |

\* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; - grant from Niagara Falls Fund

## 2015 GRANTS AWARDED

### From our Community, Mini, Environment, Summer Camp and Strategic Initiatives grant programs

|   |   |          |
|---|---|----------|
| Gateway Resident & Community Support Services of Niagara        | Create a community room equipped with a demonstration kitchen for independent life skills programming.  | \$6,500  |
| Great Lakes Christian High School                               | Purchase sets of books for Battle of the Books a free and educational reading program for children in grades 6-8.   | \$500    |
| Grimsby Public Art Gallery                                      | Purchase promotional materials to celebrate the 40th Anniversary for the Gallery.   | \$500^   |
| Habitat for Humanity Niagara                                    | Purchase a new laptop to be used in public education sessions and community events to promote their organization.   | \$500    |
| Hannah House Maternity Home                                     | Purchase an outdoor shed for garbage and recycling on property.   | \$500-   |
| Head Injury Association of Fort Erie                            | Upgrade marketing materials and purchase new computer and printer for agency to build community awareness and office efficiencies.  | \$2,000  |
| Heartland Forest Nature Experience                              | Create new Spring program "Frogs, Flight, Turtles and Wetland Sights" that will include habitat identification, interactive displays and informative facts.               | \$6,500- |
| Hospice Niagara   | Create a public awareness and education campaign to support public health approach to palliative care in the Niagara Region.  | \$5,000  |
| Hospice Niagara   | Purchase a computer for the residence family room to be used by visitors and residential clients to access supports and service information.                              | \$500    |
| I CAN Therapeutic Equestrian Riding Association of Niagara Inc. | Purchase a new efficient high volume printer for the agency to save cost and time.  | \$500    |
| Juvenile Diabetes Research Foundation                           | Host two focus group sessions with Niagara youth to determine their diabetes management needs prior to any programming designed for Niagara.                              | \$500    |
| Kristen French Child Advocacy Centre of Niagara                 | Develop, design, launch and host a new website to achieve more public contact and interaction with those using the centre.  | \$5,000  |
| Kristen French Child Advocacy Centre of Niagara                 | Support the costs of Mary Gordon to deliver presentation regarding childhood bullying.  | \$500    |
| Learning Disabilities Association of Niagara Region             | Update and modernize the LDANR website to keep community awareness and engagement up as well as ensure the website meets the AODA standards.                              | \$5,149  |
| Learning Disabilities Association of Niagara Region             | Provide training to summer staff and volunteers on how to effectively incorporate Mindfulness practice into the summer program for children.                              | \$500    |
| Literacy Council of Niagara West                                | Purchase promotional book bags to be used when sharing free books from First Book Canada as well as other literacy resources.   | \$429    |
| Literacy Link Niagara Inc.                                      | Rebrand Literacy as Adult Learning to promote a positive definition, remove barriers and increase access for adult learners through video and social media.               | \$5,000  |
| Niagara (Hope) Furniture Bank                                   | Develop a mobile information system that will increase efficiencies in referrals, donations, receipting, invoicing and inventories.                                       | \$7,000  |
| Niagara Chapter - Native Women Inc.                             | Conduct an analysis of the needs of the Urban Aboriginal Community in Niagara regarding assistance with family members who are on the Autism Spectrum.                    | \$6,193  |
| Niagara College   | Engage community to participate in Arbor Day and Earth Day 2015 with a focus on community outreach, education and engagement.   | \$3,520  |
| Niagara Falls Art Gallery                                       | Implement Seniors Teaching Seniors program which provides opportunities for senior artists to go to senior residences and nursing homes to present and lead art projects. | \$3,850- |
| Niagara Falls Art Gallery                                       | Install the bomb shelter/studio of the late William Kurelek in the gallery to enhance the present Kurelek collection which is the largest for this Canadian artist.       | \$3,250  |

\* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; - grant from Niagara Falls Fund

## 2015 GRANTS AWARDED

From our Community, Mini, Environment, Summer Camp and Strategic Initiatives grant programs

|  |   |          |
|--|---|----------|
| Niagara Falls Art Gallery  | Purchase two picnic tables to provide art campers, parents and seniors taking art classes and camps at the gallery a place to sit outside in comfort.                                   | \$500-   |
| Niagara Falls Art Gallery  | Purchase ten standard sized frames for artwork and archival mats from their permanent collection and on loan to display throughout the gallery.   | \$500-   |
| Niagara Foundation for Family and Children's Services                    | Purchase supplies for the new supervised access program, Daddy and Me, that would help fathers develop positive parenting skills.   | \$2,000  |
| Niagara Historical Society   | Expand Kid Curators program to March Break camp and develop program to deliver in schools teaching the history of Niagara.  | \$2,000  |
| Niagara Children's Centre  | Purchase a modular analysis system to provide gait analysis to children in the Niagara Region.  | \$7,594  |
| Niagara Pumphouse Visual Arts Centre                                     | Create three youth art programs for 13 to 17 year olds that include: after-school programs, workshops and camps.  | \$7,000  |
| Niagara Victim Crisis Support Service                                    | Create a new user-friendly website to assist victims, recruit volunteers and provide information to the community in a way that meets all current legislation.                          | \$3,000- |
| Open Arms Mission of Welland Inc.  | In collaboration with Niagara College, Niagara Safety Village and Links for Greener Learning, establish community garden to support food bank.  | \$500    |
| Pathstone Foundation   | Purchase a Smart Board to enhance the workshops for parents, teens and training seminars for mental health professionals.   | \$3,000- |
| Pelham Cares Inc.  | Purchase a portable sign to bring to community events to create awareness of their services.  | \$250    |
| Port Cares   | Purchase rubber floor mats for the food bank area creating a safer and more comfortable environment for the volunteers.   | \$488*   |
| Preservation of Agricultural Lands Society Inc.                          | Support the research on heat and drought tolerances of food crops to be shared with business, municipalities, youth and the farming community.  | \$5,000  |
| Project S.H.A.R.E. of Niagara Falls Inc.                                 | Update marketing materials to reflect the new vision of a food security agency, increase awareness and support.   | \$5,000- |
| Red Roof Retreat   | Purchase an iPad to process program registration payments electronically, access client information and process donations on site and events and during programming.                    | \$500    |
| Rose City - Kids Ministry  | Purchase furniture and equipment for the the new youth program for those 12 years and older.  | \$4,000  |
| Rose City - Kids Ministry  | Purchase two tablets to be used by the youth in their programming.  | \$500    |
| Showboat Festival Theatre of Port Colborne, Inc.                         | Redesign and rebuild the agency website to achieve higher functionality and marketing.  | \$1800*  |
| South Niagara Life Ministries  | Purchase a freezer to store food used to provide meals to clients attending weekly programs.  | \$395    |
| Southridge Shelter / Brock University Dept. Rec and Leisure              | Fund staff to be trained as trainers for non-violent crisis intervention and mental health first aid allowing them to offer this program to staff and volunteers on a continuous basis. | \$5,700  |
| St. John Ambulance - Niagara Falls Branch (St. John Council for Ontario) | Support Paws 4 Stories reading program where children read to therapy dogs to improve their reading skills and self confidence.   | \$4,000- |
| St. John Ambulance - Niagara Falls Branch (St. John Council for Ontario) | Purchase three vehicle back-up cameras for 2 ambulances and 1 van to increase safety.   | \$500    |
| St. John Ambulance - Niagara Falls Branch (St. John Council for Ontario) | Purchase safety equipment for the Search & Rescue Niagara training exercises and for actual search and rescues.   | \$500    |
| St. John Ambulance - Niagara Region                                      | Replace roof-top heat/AC unit at facility where volunteers receive training to carry out their work across Niagara.   | \$8,000  |

\* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; - grant from Niagara Falls Fund

## 2015 GRANTS AWARDED

From our Community, Mini, Environment, Summer Camp and Strategic Initiatives grant programs

|  |  |                      |
|--|--|----------------------|
| St. Martin's Church  | Support the installation of elevator and accessible washroom for community use of space.   | \$5,000 <sup>^</sup> |
| The Essential Collective Theatre   | Launch a Community Engagement Program that includes Theatre Comes to You, Playwriting for Youth and Poor in Niagara all to involve more Niagara residents in quality theatre-related cultural experiences.   | \$2,450              |
| The Essential Collective Theatre   | In collaboration with drama students and theatre professionals, create an original musical play based on seniors' stories that will be performed in Seniors' Centres and Long-term Care facilities throughout Niagara.   | \$5,000              |
| The Essential Collective Theatre   | Purchase accounting software to improve day to day operations.   | \$427                |
| The Hope Centre  | Construct office space to accommodate partner organizations that are dedicated to improving the well-being of Welland's most vulnerable citizens.  | \$4,486+             |
| The Hope Centre  | Fund the installation of phone and computer lines in the new organization's new space.   | \$500                |
| Town of Fort Erie (Fort Erie Museum Services)                              | Create the Made in Fort Erie experience by showcasing objects made in Fort Erie, both past and present.  | \$4,000              |
| Wellspring Niagara Cancer Support Foundation                               | Create table top and floor agency banners to be used at community events to increase awareness of their services and members.  | \$500                |
| West Niagara Palliative Care Services o/a Rose Cottage Visiting Volunteers | Relaunch the drop-in day program for clients and residents in West Niagara.  | \$4,000              |
| Women's Place of South Niagara Inc.  | Purchase iPad for the development department to maintain mobile communications with donors, volunteers and social media.   | \$500-               |
| YWCA Niagara Region  | Provide a support program to women dealing with addiction issues that will be led by a trained facilitator.  | \$11,000-            |
| Summer Camp Grants   | Provided bursaries to 18 groups to support 221 children to attend summer camp.   | \$20,620             |
| Strategic Initiatives Grants   | Emergency Leadership Planning for Non-Profit Corporations Workshop bursaries that supported the following organizations: Community Care of St. Catharines and Thorold, Hospice Niagara, Niagara Regional Sexual Assault Centre (CARSA Inc.) and Welland Heritage Council and Multicultural Centre. | \$800                |
| Strategic Initiatives Grants   | Community Forward Fund Clinic - Mapping Your Organization's Financial Future Bursary that supported the following organizations: Carousel Players and Niagara Furniture Bank.  | \$700                |
| Strategic Initiatives Grants   | Leadership Niagara Bursary that supported the following organizations: Community Care of St. Catharines and Thorold, Hospice Niagara, Project SHARE, United Way of St. Catharines and District and Brock University Student's Union.   | \$7,500              |
| Strategic Initiatives Grants   | Legacy Partners Program Grant that supported the following organizations: Bethlehem Not-for-Profit Housing Projects of Niagara, Education Foundation of Niagara, Kristen French Child Advocacy Centre of Niagara and Women's Place of South Niagara Inc.   | \$8,000              |
| Strategic Initiatives Grants   | Brock University Bi-National Initiative.   | \$5,000              |
| Strategic Initiatives Grants   | Entrepreneur of the Year Award grant to Family and Children's Services Niagara, the charity of choice from winner Steven Cohen.  | \$5,000              |
| Strategic Initiatives Grants   | Town of Niagara-on-the-Lake (War of 1812 Native Memorial Working Group) Grant to support commemoration of the sacrifices and contributions of the Six Nations and their Native Allies during the War of 1812.  | \$5,000              |

*\* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; - grant from Niagara Falls Fund*

# 2015 DONOR DIRECTED GRANTS

These grants are based on terms of the fund agreements between the donor and the Foundation with respect to beneficiary organizations.

|  |          |   |          |
|--|----------|---|----------|
| Air Cadet League of Canada - Welland 87 Eagle Squadron .....                   | \$100    | DSBN - Beamsville District Secondary School.....                                  | \$1,500  |
| ALS Society of Canada .....  | \$10,477 | DSBN - Eden High School.....  | \$1,500  |
| Alzheimer Society of Niagara Region .....                                      | \$1,000  | DSBN - South Lincoln High School .....  | \$1,500  |
| Alzheimer Society of Niagara Region .....                                      | \$5,000  | DSBN - Stamford Collegiate Secondary School.....                                  | \$1,500  |
| Alzheimer Society of Niagara Region .....                                      | \$926    | DSBN - Stamford Collegiate Secondary School.....                                  | \$500    |
| Amici Camping Charity.....   | \$2,000  | DSBN - Westlane Secondary School .....  | \$1,500  |
| Animal Assistance Society of the Niagara Region .....                          | \$1,192  | DSBN - Westlane Secondary School .....  | \$500    |
| Animal Assistance Society of the Niagara Region .....                          | \$2,808  | Durham College - Financial Aid and Awards office.....                             | \$1,000  |
| Arthritis Society Ontario Division - Niagara Peninsula Office .....            | \$506    | Education Foundation of Niagara.....  | \$7,427  |
| Bay Area Restoration Council of Hamilton and Halton .....                      | \$50     | Education Foundation of Niagara.....  | \$557    |
| Beamsville Church of Christ.....   | \$50,000 | Education Foundation of Niagara.....  | \$7,427  |
| Benevolent Society of Grimsby and District .....                               | \$60     | Education Foundation of Niagara.....  | \$319    |
| Bethlehem Housing and Support Services.....                                    | \$1,790  | Education Foundation of Niagara.....  | \$456    |
| Bethlehem Housing and Support Services.....                                    | \$1,260  | Education Foundation of Niagara.....  | \$319    |
| Bethlehem Housing and Support Services.....                                    | \$10,000 | FirstOntario Performing Arts Centre.....  | \$1,500  |
| Big Brothers Big Sisters - Grimsby Lincoln, West Lincoln .....                 | \$6,843  | FirstOntario Performing Arts Centre.....  | \$2,500  |
| Big Brothers Big Sisters of Niagara Falls .....                                | \$2,000  | Fleming College - Financial Aid .....   | \$3,000  |
| Big Brothers Big Sisters of Niagara Falls.....                                 | \$777    | Fondation C.A.R.M.E.N.....  | \$70     |
| Big Brothers Big Sisters of South Niagara .....                                | \$754    | Fort Erie Conservation Club .....   | \$527    |
| Bob Gale Recreation Fund.....  | \$5,000  | Fort Erie Society for the Prevention of Cruelty to Animals .....                  | \$750    |
| Boxrun Charitable Foundation.....  | \$1,387  | Friends Of Fort Erie's Creeks .....   | \$535    |
| Breaststrokes .....  | \$50     | Gillian's Place .....   | \$926    |
| Brock University - Office of Development and Donor .....                       | \$1,000  | Gillian's Place .....   | \$1,000  |
| Brock University - Student Awards and Financial Aid .....                      | \$879    | Girl Guides of Canada (Welland Brownie Unit 11B).....                             | \$50     |
| Brock University - Student Awards and Financial Aid .....                      | \$2,000  | Glengate Alliance Church.....   | \$50     |
| Brock University - Student Awards and Financial Aid .....                      | \$571    | Great Lakes Christian High School .....   | \$1,500  |
| Canadian Cancer Society.....   | \$3,457  | Grimsby Museum (Town of Grimsby).....   | \$215    |
| Canadian Cancer Society (Niagara) .....  | \$70     | Habitat for Humanity Niagara+ .....   | \$1,500  |
| Canadian Diabetes Association.....   | \$100    | Healthy Minds Canada .....  | \$406    |
| Canadian Mental Health Association .....                                       | \$500    | Healthy Minds Canada .....  | \$486    |
| Canadian Red Cross, Niagara Area Branches.....                                 | \$1,013  | Heart and Stroke Foundation of Ontario.....                                       | \$506    |
| Canadian Red Cross, Niagara Area Branches.....                                 | \$50     | Heart and Stroke Foundation of Ontario.....                                       | \$60     |
| Cave Springs Camp Inc.....   | \$342    | Heart and Stroke Foundation of Ontario.....                                       | \$926    |
| Chorus Niagara .....   | \$10,000 | Heart Niagara Inc.....  | \$35,000 |
| Chorus Niagara .....   | \$1,545  | Heart Niagara Inc.....  | \$500    |
| Chorus Niagara .....   | \$3,421  | Heart Niagara Inc.....  | \$75,000 |
| Church of the Transfiguration .....  | \$11,252 | Heritage Christian School - Niagara Reformed Christian Education Association..... | \$1,500  |
| City of Port Colborne - Roselawn Centre+.....                                  | \$1,500  | Hospice Niagara .....   | \$4,790  |
| City of Welland - Recreation & Culture .....                                   | \$1,425  | Hospice Niagara.....  | \$2,000  |
| CNIB.....  | \$926    | Hospice Niagara.....  | \$2,000  |
| Community Animal Allies of Niagara.....  | \$7,000  | Hospital Family Houses of Ontario (The Mark Preece Family House).....             | \$50     |
| Community Animal Allies of Niagara.....  | \$2,250  | Humber College - Financial Aid - Scholarships and Awards.....                     | \$2,000  |
| Community Care of St. Catharines and Thorold*.....                             | \$7,300  | Jordan Historical Museum of the Twenty .....                                      | \$342    |
| Community Care of St. Catharines and Thorold .....                             | \$500    | Kristen French Child Advocacy Centre of Niagara .....                             | \$500    |
| Community Care of St. Catharines and Thorold .....                             | \$739    | Kristen French Child Advocacy Centre of Niagara .....                             | \$2,500  |
| Community Care of St. Catharines and Thorold .....                             | \$6,896  | Kristen French Child Advocacy Centre of Niagara .....                             | \$738    |
| Community Care of St. Catharines and Thorold .....                             | \$1,000  | La corporation de l'école polytechnique de Montreal .....                         | \$339    |
| Community Care of St. Catharines and Thorold (Niagara Nutrition Partners)..... | \$307    | Lambton College - Financial Aid .....   | \$1,000  |
| Community Care of West Niagara .....   | \$7,821  | Land Care Niagara .....   | \$530    |
| Community Care of West Niagara .....   | \$342    | Laurentian University .....   | \$500    |
| Community Care of West Niagara .....   | \$4,000  | Learning Disabilities Association of Halton .....                                 | \$500    |
| Community Living - Grimsby Lincoln & West Lincoln .....                        | \$2,444  | Lincoln County Humane Society.....  | \$220    |
| Community Living St. Catharines .....  | \$6,395  | Lincoln County Humane Society.....  | \$3,457  |
| Community Living St. Catharines .....  | \$446    | Lincoln County Humane Society.....  | \$926    |
| Conestoga College - Financial Aid.....   | \$1,000  | Lincoln County Humane Society.....  | \$3,500  |
| Conestoga College - Financial Aid.....   | \$3,000  | Niagara Foundation for Family and Children's Services.....                        | \$1,000  |
| Conseil Scolaire de District Catholique.....                                   | \$1,500  | Niagara Foundation for Family and Children's Services.....                        | \$580    |
| Conseil Scolaire de District Catholique.....                                   | \$1,000  | Niagara Foundation for Family and Children's Services.....                        | \$2,265  |
| Conservation Niagara Foundation.....   | \$531    | Lincoln Public Library.....   | \$9,777  |
| Covenant House Toronto.....  | \$60     | Lincoln Public Library.....   | \$3,000  |
| Cystic Fibrosis Canada - Niagara Chapter .....                                 | \$3,457  | Literacy Council of Niagara West.....   | \$4,000  |
| Doctors Without Borders Canada .....   | \$1,013  | Literacy Council of Niagara West.....   | \$2,444  |
| Dog Guides Canada.....   | \$1,556  | March of Dimes Canada.....  | \$3,617  |
| Dog Guides Canada.....   | \$926    | Mayholme Foundation .....   | \$56,599 |
| Dog Guides Canada.....   | \$250    | McGill University .....   | \$2,000  |
| DSBN - A. N. Myer Secondary School.....  | \$1,500  | McMaster Children's Hospital Foundation.....                                      | \$500    |
| DSBN - A. N. Myer Secondary School.....  | \$500    | McMaster University.....  | \$2,000  |

\* Grant from St. Catharines Fund; + grant from Port Colborne Fund



## 2015 DONOR DIRECTED GRANTS

|   |           |  |          |
|---|-----------|--|----------|
| McNally House Hospice.....  | \$5,000   | Phoenix Place: Stage II Housing for Victims of Domestic Violence.....                                | \$50     |
| McNally House Hospice.....  | \$74,220  | Port Colborne Feline Initiative.....   | \$1,000  |
| McNally House Hospice.....  | \$3,457   | Project S.H.A.R.E. of Niagara Falls Inc.....   | \$500    |
| McNally House Hospice.....  | \$5,902   | Regional Niagara Upper Canada Lodge Auxiliary.....   | \$7,781  |
| Mohawk College.....   | \$10,000  | Rotary Club of Lincoln Foundation.....   | \$235    |
| Monastery of Mount Carmel.....  | \$7,069   | Rotary Club of St. Catharines South - Charitable Trust.....  | \$2,795  |
| Multiple Sclerosis Society of Canada.....   | \$926     | Royal Canadian Legion Welland (Branch No. 4).....  | \$50     |
| Muscular Dystrophy Canada.....  | \$11,891  | Scouts Canada.....   | \$110    |
| Nativity of the Holy Mother of God.....   | \$49,323  | Shaw Festival Theatre Foundation, Canada.....  | \$2,000  |
| Newark Neighbours.....  | \$500     | Shaw Festival Theatre Foundation, Canada.....  | \$10,000 |
| Niagara Action for Animals.....   | \$6,000   | Silver Spire United Church.....  | \$739    |
| Niagara Action for Animals.....   | \$926     | Sleeping Children Around the World.....  | \$540    |
| Niagara Action for Animals.....   | \$2,025   | Smithville & District Association for Christian Education -<br>Smithville Christian High School..... | \$1,500  |
| Niagara Action for Animals.....   | \$225     | St. George's Anglican Church.....  | \$1,000  |
| Niagara Artists Company (Niagara Artists Centre).....                               | \$852     | St. Giles Presbyterian Church.....   | \$645    |
| Niagara Artists Company (Niagara Artists Centre).....                               | \$590     | St. John the Theologian Ukrainian Catholic Church.....   | \$49,323 |
| Niagara College - Financial Aid.....  | \$2,000   | St. Mark's Historic Properties Foundation, c/o St. Mark's Church.....                                | \$1,150  |
| Niagara College Foundation.....   | \$1,000   | St. Therese of Lisieux Church.....   | \$465    |
| Niagara Community Foundation.....   | \$2,500   | St. Therese of Lisieux Church.....   | \$5,544  |
| Niagara Concerts.....   | \$5,000   | Stamford Lane United Church.....   | \$1,000  |
| Niagara Concerts.....   | \$125     | Start Me Up Niagara (SMUN).....  | \$50     |
| Niagara Falls Community Outreach.....   | \$5,000   | Sts. Cyril & Methodius Church.....   | \$49,323 |
| Niagara Falls Humane Society.....   | \$500     | The Adult Literacy Council of Greater Fort Erie.....   | \$929    |
| Niagara Falls Humane Society.....   | \$2,172   | The Army Cadet League of Canada (613 Lincoln & Welland Regiment).....                                | \$200    |
| Niagara Foundation for Catholic Education.....                                      | \$1,500   | The Hope Centre.....   | \$280    |
| Niagara Foundation for Catholic Education.....                                      | \$1,500   | The Hospital for Sick Children Foundation (SickKids Foundation).....                                 | \$521    |
| Niagara Foundation for Catholic Education.....                                      | \$1,500   | The Salvation Army Community & Family Services - Niagara Region.....                                 | \$1,013  |
| Niagara Foundation for Catholic Education.....                                      | \$500     | The Salvation Army Niagara Orchard Community Church.....   | \$500    |
| Niagara Foundation for Catholic Education.....                                      | \$500     | The Salvation Army St. Catharines Community & Family Services.....                                   | \$886    |
| Niagara Foundation for Family and Children's Services.....                          | \$679     | The School of Restoration Arts at Willowbank.....  | \$500    |
| Niagara Foundation for Family and Children's Services.....                          | \$2,145   | Town of Lincoln - Jordan Historical Museum.....  | \$2,444  |
| Niagara Foundation for Family and Children's Services.....                          | \$1,344   | True Sport Foundation.....   | \$10,000 |
| Niagara Foundation for Family and Children's Services.....                          | \$1,000   | Ukrainian Canadian Congress Charitable and Educational Trust.....                                    | \$49,323 |
| Niagara Historical Society.....   | \$500     | Ukrainian Canadian Social Services (St. Catharines) Inc.....   | \$49,323 |
| Niagara Land Trust.....   | \$1,340   | United Way of Niagara Falls and Greater Fort Erie.....   | \$1,000  |
| Niagara Life Welland Centre o/a Elisha House Pregnancy & Family Support Centre..... | \$7,927   | United Way of South Niagara.....   | \$60     |
| Niagara Peninsula Children's Centre.....  | \$1,013   | United Way of South Niagara.....   | \$1,520  |
| Niagara Peninsula Children's Centre.....  | \$1,000   | United Way of St. Catharines and District.....   | \$1,000  |
| Niagara Peninsula Children's Centre.....  | \$1,056   | University of Guelph.....  | \$1,000  |
| Niagara Peninsula Conservation Foundation.....                                      | \$3,421   | University of Toronto.....   | \$10,000 |
| Niagara Region Sexual Assault Centre (CARSA Inc.).....                              | \$489     | University of Waterloo.....  | \$1,000  |
| Niagara Region Sexual Assault Centre (CARSA Inc.).....                              | \$926     | University of Waterloo.....  | \$1,000  |
| Niagara Resource Service for Youth (The RAFT).....                                  | \$10,000  | VON Canada - Ontario Branch - Niagara Site.....  | \$3,421  |
| Niagara Symphony Association.....   | \$10,000  | Welland and District Humane Society (S.P.C.A.).....  | \$60     |
| Niagara Symphony Association.....   | \$3,421   | Welland Heritage Council and Multicultural Centre.....   | \$190    |
| Niagara Youth Orchestra.....  | \$3,421   | Wellspring Niagara Cancer Support Foundation.....  | \$2,201  |
| Niagara-on-the-Lake Public Library.....   | \$1,049   | Wellspring Niagara Cancer Support Foundation.....  | \$906    |
| Niagara-on-the-Lake Public Library.....   | \$2,402   | Wellspring Niagara Cancer Support Foundation.....  | \$50     |
| OneFoundation for Niagara Health System - GNGH Site.....                            | \$3,000   | Wellspring Niagara Cancer Support Foundation.....  | \$5,000  |
| OneFoundation for Niagara Health System - Port Colborne Site.....                   | \$2,772   | West Lincoln Community Care.....   | \$569    |
| OneFoundation for Niagara Health System - St. Catharines Site.....                  | \$1,231   | West Niagara Agricultural Society.....   | \$2,351  |
| OneFoundation for Niagara Health System - St. Catharines Site.....                  | \$100,000 | Women's Place of South Niagara Inc.....  | \$446    |
| OneFoundation for Niagara Health System - St. Catharines Site.....                  | \$901     | Women's Place of South Niagara Inc.....  | \$1178   |
| OneFoundation for Niagara Health System - St. Catharines Site.....                  | \$679     | Women's Place of South Niagara Inc.....  | \$210    |
| OneFoundation for Niagara Health System - Welland Site.....                         | \$497     | Women's Place of South Niagara Inc.....  | \$500    |
| OneFoundation for Niagara Health System - Welland Site.....                         | \$1,520   | YMCA of Niagara.....   | \$2,000  |
| Ontario Brain Injury Association.....   | \$5,000   | YMCA of Niagara.....   | \$1,000  |
| Ontario Lung Association - Branch serving Niagara.....                              | \$1,013   | YMCA of Niagara.....   | \$873    |
| Open Arms Mission of Welland Inc.....   | \$50      | YMCA of Niagara.....   | \$2,129  |
| Open Arms Mission of Welland Inc.....   | \$7,927   | YMCA of Niagara *.....   | \$19,000 |
| Osteoporosis Canada - Niagara Chapter.....  | \$926     | YMCA of Niagara+.....  | \$3,000  |
| Parkinson Society Central & Northern Ontario.....                                   | \$2,000   | YWCA Niagara Region.....   | \$1,214  |
| Pathstone Foundation.....   | \$3,500   | YWCA Niagara Region.....   | \$2,000  |
| Pathstone Foundation.....   | \$1,000   | YWCA Niagara Region.....   | \$1,000  |
| Pathstone Foundation.....   | \$698     |  |          |
| Pathstone Foundation.....   | \$2,500   |  |          |
| Pathstone Mental Health.....  | \$50      |  |          |
| Pathstone Mental Health.....  | \$5,000   |  |          |

**\$1,185,867**

\* Grant from St. Catharines Fund; + grant from Port Colborne Fund

# celebrating our DONORS

## GIVING MORE THAN YOU TAKE

Claudia Brema and her three sisters always knew the value of giving to their community. Raised in Port Colborne by civic-minded parents, Claudia and her sisters watched their parents' tireless support of their church and community.

Her father, Inco foreman Maurice Walker, was recruited by Inco in the 1930s to take a job at the refinery and play hockey and baseball on the championship-winning company teams. Through his work, Maurice was introduced to St. John Ambulance and he "practiced his talents patching up kids at sporting events," Claudia recalls. Neighbourhood children with cuts and scrapes didn't go home for first aid, but came to the Walker house, she laughs.

Her mother, Verna Knoll Walker, dedicated her life to Brownies, the Home and School Association, church committees and the Port Colborne Historical and Marine Museum.

So it was natural that Claudia, who is also a passionate volunteer and community booster, turned to the Niagara Community Foundation to create a legacy of her parents' generosity. **THE VERNA AND MAURICE WALKER FUND**, established in 2015, is part of the Foundation's Port Colborne Fund.

"My parents always instilled the rule that you do not take what you cannot give back," Claudia said. "It truly is an honour and a privilege to honour them by creating a fund in their name. What better way to keep their memory alive."

## SERVING OTHERS WITH HUMILITY AND GRACE

A Niagara couple's affection for their community is having a big impact on other people's hearts. **THE JOHN AND LILLIAN CLARK FUND**, established by their daughter in her parents' memory, is helping Heart Niagara reach thousands of young people with important health information.

Both John and Lillian Clark were doctors, who together shared nearly 90 years of caring for Niagara residents – Lillian as a Niagara Falls pediatrician and John as a surgeon. Both died in 2013 within months of each other; both were 94 years old.

Their daughter, Deb Allerton, donated \$1-million to establish a fund in their name, to be managed by the Niagara Community Foundation.

"I was looking for something to preserve their legacy and their memory, not just for myself and my family, but also the memories the Niagara community has of both my mum and dad," Allerton said. Income and capital from the fund will be used to support Niagara's Healthy Heart Schools' Program.

Through the program, thousands of elementary and secondary school students receive CPR and defibrillator training each year, plus heart health information and a health assessment, including measurement of height, weight and waist circumference, body mass index calculation, blood pressure monitoring and cholesterol testing.

"Mom and Dad taught me that nothing should be done in half measures, that we have an obligation to serve society and they above all did this with humility and grace," Allerton said.

*– with files from Allison Langley, The Niagara Falls Tribune. Used with permission.*

## GIVING TO HELP AND TO INSPIRE

Richard Gark strives to live by a few simple words: Giving is a good thing to do.

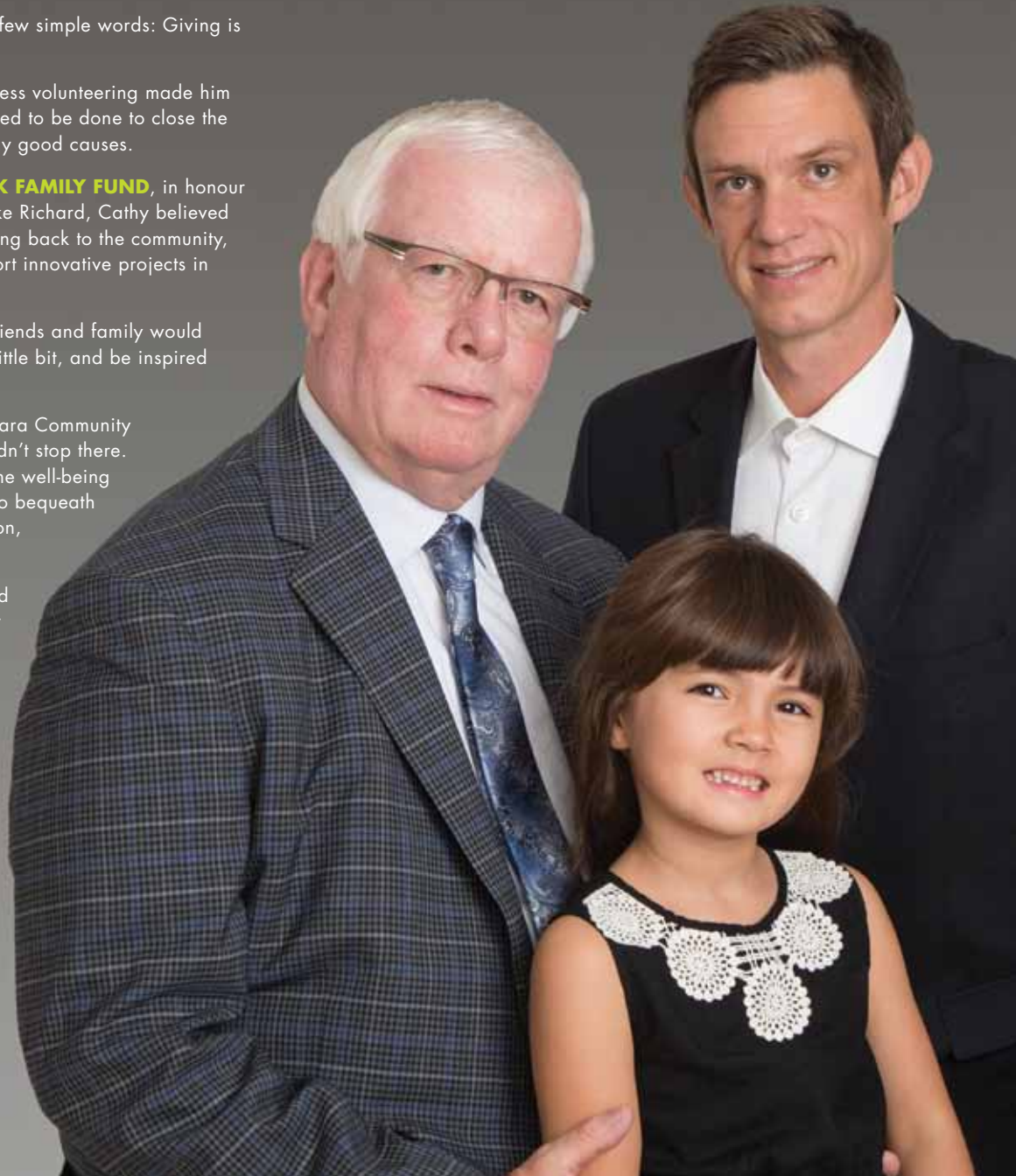
The Jordan Station resident's tireless volunteering made him realize, however, that more needed to be done to close the funding gap experienced by many good causes.

To help, he established the **GARK FAMILY FUND**, in honour of his wife who died in 2010. Like Richard, Cathy believed strongly in the importance of giving back to the community, so it was a fitting tribute to support innovative projects in the region.

More than that, Richard hoped friends and family would see the benefit of giving even a little bit, and be inspired to do the same.

Richard, who serves on the Niagara Community Foundation's grant committee, didn't stop there. Compelled to do more to foster the well-being of Niagara's youth, he decided to bequeath part of his estate to the Foundation, trusting it to carry out his wishes.

"Giving of yourself, your time and your financial support throughout your life is rewarding in so many different ways. If these words motivate my family to take action and I have demonstrated the benefit of these words, then I have accomplished what I wanted to do," he said. "I don't want to be famous. I don't want to set the world on fire. I just want to singe it a little."



## CELEBRATING THE IMPORTANCE OF CANADA'S FIRST NATIONS

Barbara Davidson has incredible memories from her childhood on a farm in Niagara-on-the-Lake. She and her brother Dan would walk around the grounds and find flint artifacts from First Nations who roamed the land centuries before her. The elm trees lining the property were planted in the late 1700s, harkening from the time of the MacNab land grant.

"We always had a strong sense of the people who were there before us," Barbara said. "When you're a kid, some things make such a deep impression that when you're older, they become important."

Those memories have compelled Barbara, now in her late 60s, to establish the **NIAGARA ABORIGINAL ADVANCEMENT FUND** to benefit the local chapter of Native Women Inc. The fund, dedicated solely to benefiting Niagara's First Nations communities, is the first of its kind within the Foundation. Barbara and Dan have both made bequests in their wills to assist the fund and Foundation.

The money will provide scholarships and bursaries to fund the training and education of First Nations youth interested in environmental issues. It will also support cultural events, and cover other needs that arise.

"Canadian history hasn't really reflected how important native peoples are," Barbara said. "They are the natural people to teach us how to care for the environment."

## LOOKING FOR DONORS IN ALL THE RIGHT PLACES

Would you leave a gift for a good cause? Turns out, many people would – but they haven't been asked.

As baby boomers age and make plans for what will happen to their savings after they're gone, the Niagara Community Foundation wants to make sure they have a chance to leave a legacy. It turns out that asking them is important.

Only 7% of Canadians have named a charity in their will, yet nearly five times that amount have said they would leave a gift if they were asked.

And making "the ask" is worth it.

This intergenerational transfer of wealth, estimated by some to be worth as much as \$1 trillion in Canada, will peak over the next 15 years. The Foundation has an excellent track record of encouraging generosity, with the size of Niagara bequests typically exceeding the national average.

Currently, there are eight charities in the Foundation's **LEGACY PARTNERS PROGRAM**, getting expert advice and financial support as they develop and implement their plans to secure bequests. Donors are encouraged to endow their gift, and the Legacy Partners Program has a goal of endowing at least \$3 million and up to \$5 million over five years.

The current partners are:  
Bethlehem Housing and Support Services  
Community Care St. Catharines and Thorold  
Education Foundation of Niagara  
Kristen French Child Advocacy Centre  
Niagara Foundation for Family & Children's Services  
Red Roof Retreat  
Women's Place of South Niagara  
YWCA of Niagara

Charities interested in joining the Legacy Partners Program should contact the Foundation.



## SWINGING A CLUB FOR A GOOD CAUSE

Kevan O'Connor knows how to celebrate a birthday: get a few friends on the golf course and, instead of making the day about him, use it to raise money for a good cause.

For the past three years, he and wife Lynn Masaro have chipped in the money raised to create the **LYNN & KEVAN'S NIAGARA CHARITIES FUND** with the Niagara Community Foundation. Building up a pool of money that will eventually be self-sustaining while supporting important community endeavours has a lasting effect, and that's what the couple wanted, Kevan said.

Better yet, working through the Foundation provides them with the oversight to ensure the greatest value for the money they'll continue raising on the greens. The discipline required to contribute year after year also can't be overstated, he noted.

"To do a one-off donation to something doesn't have a lasting effect. To do something more requires discipline. The Foundation provides that discipline. They help you meet goals and there's a formality to it. That discipline gives you stick-to-it-iveness. You can lose interest as time goes by but not with the Foundation."

The fund will begin being shared with community groups and projects in 2016. In the meantime, O'Connor is putting his 72 golf buddies on standby to practice their swings. They'll be teeing off with him again soon.

## HELPING THE PAST ENRICH THE FUTURE

Valentina Mulkewich McLeod's love of her community was expressed in her dedicated volunteerism, in her community leadership and in her garden parties.

But it also continues to be expressed in the **VALENTINA MCLEOD ARTS AND HERITAGE COMMUNITY DEVELOPMENT FUND** for the Old Town of Niagara-on-the-Lake, created by Val to ensure that the things that enrich the life of a community will be protected.

Val, who died in November 2015, had lived and worked in a number of Canadian communities and had travelled the world. But her love of the heritage and culture that make Niagara-on-the-Lake vibrant and unique came to be especially meaningful to her.

The daughter of immigrant farmers who came to Canada from Belarus (Russia) following the First World War, Val grew up on a farm in Norfolk County and learned early the importance of hard work and of contributing to her community. After retiring following a long career as an educator and as a volunteer with organizations such as the University Women's Club, Brock University and Shaw Festival, Val's donation was inspired by the example of her family.

Val, who once joked that she would like to be remembered for throwing the best garden party of the summer, has left a legacy in the Niagara Community Foundation fund in her name, to help others preserve NOTL's "Old Town" culture and heritage.

And she also practiced what she preached. Val and her partner lovingly restored their 1846 heritage home and she planned the gift in the hope it would inspire and encourage others. As Val said: "It takes effort and planning to preserve the past."

## SMART AND CARING FUNDS

Governor General David Johnston became the patron of Community Foundations of Canada in 2011. His vision to build smart and caring communities is based on three pillars: innovation, philanthropy and volunteerism. His vision meshes with the Niagara Community Foundation's guiding principle to demonstrate philanthropic leadership.

In support of his vision, we created theme-based Smart and Caring Funds. Donations to these funds are accepted in any amount, in any way and can be made either during a donor's lifetime or through an estate.

Our Smart and Caring Funds give the Foundation the greatest flexibility to respond to current community needs by providing grants to charities across Niagara through a transparent application and assessment process.

Our thanks go out to the following community leaders who also agreed to be the champions for our Smart and Caring Funds:

### **EDUCATION AND LEADERSHIP FUND FOR NIAGARA**

- Wade Stayzer

### **ENVIRONMENTAL LEGACY FUND FOR NIAGARA**

- John Fisher

### **CHILDREN AND YOUTH FUND FOR NIAGARA**

- Judy Reid

### **HEALTH AND WELL-BEING FUND FOR NIAGARA**

-Valerie Jaeger

### **CULTURAL ENDOWMENT FUND FOR NIAGARA**

- Val Fleming

## MAKING GIVING AUTOMATIC

Like some people give to an automatic savings plan, Lincoln resident Sara Holmes puts her money into an automatic giving plan.

Each month, she sees money automatically come out of her bank account and go into the **HOLMES BARRETT FAMILY FUND** that she set up with husband Ian Barrett to benefit the Foundation's Lincoln Community Fund.

"It's money that you don't miss," Sara said.

It's money, however, that is already providing great benefit. A portion of Sara's monthly donation is having immediate impact on grants the Foundation provides to charities within Lincoln. So far the Foundation has provided more than \$68,000 to projects like building a new boardwalk at Charles Daley Park, to sending kids to camp, and to purchasing audio-visual equipment for the community rooms at the new Fleming Centre in Beamsville.

Meanwhile, funds created by Lincoln donors like Sara have provided another \$611,000 in grants to charities serving the community since 2002.

For Sara, who hails from Vineland, giving back locally was important. So, too, was instilling the importance of helping — and how easy it can be — in her five-year-old daughter Taylor. Birthday parties and other events in Taylor's life could all be used as opportunities to give, she said.

"This was something that we could always be donating to, and showing her how easy it is to do."



# ENDOWMENT FUNDS CONTINUE TO GROW

The Foundation has a different face to each of our donors. Their funds can support a particular cause, community or charity and once a fund is opened anyone can make gifts of any amount, in any way, at any time. Donations can also be made in honour or memory of a loved one.

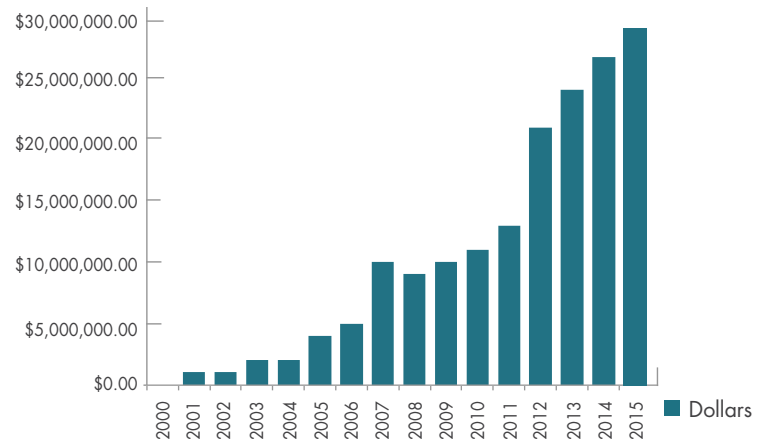
There are many ways to make a gift to the Foundation. These include cash, securities, bequests, special event proceeds, property, and insurance policies. Our role is to work with donors to ensure that their charitable intent is achieved through their gift.

There are a number of options for donors when considering how long they would like their fund to be active. Most of our funds are held in perpetuity, where the capital is preserved and a portion of the annual earnings on the fund are allocated to charities. Funds can also be held for a specific length of time or established to have a fixed annual distribution. In these later two examples both the capital and the earnings are distributed.

However, with increasing demands for support, it is important to take the time to determine how to make 'the best gift', a gift that provides maximum benefits to the community

that is within one's capacity to give. We strongly advise donors to speak to their family, lawyer, accountant or financial planner to determine the best way to make a gift that maximizes their tax and estate goals.

## ENDOWMENT FUND GROWTH



## Smart and Caring Community Funds

In 2012 we created a group of sector-based funds that support current and emerging community needs. We called these our Smart and Caring Funds in recognition of the vision of Governor General David Johnston, the patron of Community Foundations of Canada, to build smart and caring communities based on three pillars: innovation, philanthropy and volunteerism.

Our current funding priorities include: initiatives that align with priorities identified in the Living in Niagara Report, resources to help charities become more efficient and effective and leadership development and training opportunities for the voluntary sector.

Donors interested in supporting future community needs are able to make a contribution to the Niagara Fund or one of the local community funds listed below. Grants from community funds are restricted to charities providing programs and services in those municipalities.

Donors can create a named fund within any of our community funds or our Smart and Caring funds with a gift of \$5,000, which can be gifted either on an annual or monthly basis.



## ENDOWMENT FUNDS CONTINUE TO GROW

### Niagara Fund

- Alice Downie-Bacon Community Fund
- Beth & Murton Seymour Family Fund
- Branscombe Families Fund
- Canada GOATS Endowment Fund
- Caughill Family Fund
- Crawford Smith & Swallow Fund
- Dr. T. W. & Muriel O'Mulvenny Fund
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- Fallsview Casino Resort Fund
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- John & Jan Potts Fund
- June Munro Fund
- Marv Kriluck Fund
- Meridian Credit Union Fund
- Niagara Fund
- Niagara Road Supervisors Association Fund
- Regional Chair's Smart and Caring Community Fund
- Waters & Meredith Fund
- \* Woodhead Family Fund

### Fort Erie Fund

- \* Facca-Mindorff Family Fund
- Fort Erie Fund
- Little-Green Family Fund

### Grimsby Fund

- Grimsby Community Fund
- \* Grimsby Benevolent Fund
- Matthew Zimmerman Memorial Fund
- \* Pettigrew Family Fund

### Lincoln Fund

- \* Holmes Barrett Family Fund
- \* Lincoln Community Fund
- Lincoln Chamber of Commerce Fund
- Hopkins Hill Family Fund

### Niagara Falls Fund

- Americana-DiBellonia Family Fund
- Courtyard Marriott Hotel Fund
- DiCienzo Family Fund
- Embassy Suites Hotel Niagara Falls Fallsview Fund
- Hay Family Fund
- Hilton Niagara Falls Fallsview Fund
- Niagara Falls Community Fund
- Ripley's Great Wolf Lodge Fund

### Niagara West Fund

- Bruce & Bonnie Wallace Family Fund
- Ericway Tire Community Fund

- Ken and Jennifer Southward Family Fund
- M. K. Rittenhouse Family Fund
- Niagara West Community Fund

### Pelham Fund

- Adamson Family Fund
- Augustyn Berkhout Family Fund
- Pelham Community Fund

### Port Colborne Fund

- Brend Butler Family Funds (4)
- Dr. Scotty & Kay Wilson Legacy Fund
- Gary Talosi Thanks Port Colborne Fund
- Gordon Hurst Fund
- Hartley & Florentine Wallace Fund
- John and Darlene Tuck Family Fund
- Marsh Family Fund
- Port Colborne Community Fund
- \* Port Colborne Downtown Cruiser's Assoc. Fund
- Tom and Mary Cronin Fund
- \* Verna and Maurice Walker Fund

### St. Catharines Fund

- Burgoyne Doolittle Fund
- Caplan Family Anniversary Legacy Fund
- Durward Jones Barkwell
- Investing in St. Catharines Youth Fund
- Jean Whitty Family Fund
- Newman Rigby Family Fund
- St. Catharines Fund
- Whyte Family Endowment Fund

### Wainfleet Fund

- Robson Family Fund
- Wainfleet Community Fund

### Welland Fund

- Angie & Gary Talosi Family Fund
- Groom Jensen Family Fund
- Neill Terry Family Fund
- Peter & Andrew Papp Family Fund
- Raymond & June Harper Fund
- Welland Community Fund
- Welland Mayor's Children & Youth Fund

### Smart & Caring Community Impact Funds

Donors are passionate about causes that matter to them, ranging from education and the environment to children, culture, health and welfare. Since the Foundation supports all charitable sectors we have the ability to connect donors' passions with local organizations through the creation of Smart & Caring Community Impact Funds. These funds can be

opened with \$25,000 which can be pledged over a five-year period. Once a fund is opened, donations can be added to any of the funds listed below. Named funds can be created within an existing Smart & Caring Fund with a \$5,000 donation.

### Animal Welfare

- Earl & Ida Clarke Animal Welfare Fund
- LetPets Live Fund
- Niagara Falls Humane Society Shelter Enhancement Fund

### Children & Youth

- **Smart & Caring Children & Youth Fund for Niagara**
- Ann Fast Fund
- Anna Angelone Endowment Fund
- Big Brothers Big Sisters Endowment Fund
- Brend Butler Family Fund 4
- Brock Finance & Investment Group FT Fund
- CARMI for Kids Fund
- Charron Family Fund
- David and Susanne DiLalla Howes Family Fund
- Groch Family Fund
- \* Hammond Family Fund
- Investing in St. Catharines Youth Fund
- Kristen French Child Advocacy Centre Niagara Fund
- Niagara Family & Children's Services Endowment Fund
- Ontario Endowment for Children & Youth in Recreation
- \* Pathstone Foundation Fund
- Richard and Cathy Gark Family Fund
- Robert A. Lavelle Memorial Fund
- Secord Reid Family Fund
- Sun Media Children's Summer Camp Fund
- Young Children Priority First - Kiwanis Fund

### Culture

#### Smart & Caring Cultural Endowment Fund for Niagara

- \* Alice Crawley Endowment Fund for Women Artists' Fund
- Arthur Dalfen Fund
- Arts & Heritage Community Development Fund for the Old Town of NOTL and Village of Queenston
- Audrey Shimizu Memorial Fund
- Carol Leppert Music Fund for Steele Street School
- Carol Leppert Music Fund for Winger Public School
- Grimsby Museum Endowment Fund
- Mayholme Foundation Fund

## ENDOWMENT FUNDS CONTINUE TO GROW

- Niagara Children's Chorus Fund
- NOTL B&B Association Fund
- NOTL Library Michael Dietsch Fund
- Regan Peacock-Fung Memorial Art Fund
- Robert Cooper Choral Scholars Fund
- Smylski-Attenborough Fund
- Valentina McLeod Arts & Heritage Community Development Fund for the 'Old Town' of NOTL

### Education & Leadership

- **Smart & Caring Education & Leadership Fund for Niagara**
- Adult Literacy Council of Greater Fort Erie Fund
- Alice Downie- Bacon Designated Fund
- CFUW St. Catharines Endowment Fund
- Children of Niagara's Migrant Workers Award Endowment Fund
- Chuck & Judy Smith Bursary Fund
- DiCenzo Family FT Fund
- Education Foundation of Niagara Fund
- Education Foundation of Niagara Poverty & Emergency Relief Fund
- \* Ferrara Kennedy Student Award Fund
- Gene Luczkiv Spirit of Enterprise Endowment Fund
- Grape & Wine Education Research Fund
- John-Micheal Martin Memorial Fund
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- Larry and Olga Andrusiw Paramedic Award Fund
- \* lycett Family Fund
- Niagara Engineering Week Scholarship Fund
- Niagara Falls Big Brothers Big Sisters Scholarship Fund
- Niagara Peninsula Energy Award Fund
- Stephen Souter Memorial Fund
- Sunday in the Parks Fund
- Zonta Club of Niagara Falls Fund

### Environment

- **Smart & Caring Environment Legacy Fund**
- Bert Miller Nature Club Endowment Fund
- Conservation Niagara Fund
- Enbridge Awaire Fund
- Fengate Realty Group Environment Fund
- Fort Erie Conservation Club Fund
- Friends of Fort Erie's Creeks Fund
- G. E. Galbraith Electric Ltd. Fund
- Harry Deline Fund
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- Nelson Aggregate Environmental Fund
- Niagara CAER Group Fund
- Niagara Land Trust Endowment Fund
- Regional Chair's Environmental Legacy Fund for Niagara
- Roll Surface Technologies Inc. Fund

- RV Anderson Associates Fund
- RWDI Air Inc. Fund
- Samuel L. Rudolph Memorial Fund
- Urban & Environmental Mgmt Fund
- W. S. Tyler Canada Environmental Fund
- Walker Industries Earth 1st Fund
- Walter & Sons Excavating Environment Fund

### Health & Well-being

- **Smart & Caring Health & Well-being Fund for Niagara**
- Andrea Douglas Fund
- Bethlehem Housing and Support Services Endowment Fund
- Brend Butler Family Fund 2
- Chris Lackenbauer Memorial Fund
- Colleen Kiers Memorial Fund
- Community Care - St. Catharines Thorold Fund
- Community Living St. Catharines Endowment Fund
- Ed and Rosalie Vasso Fund
- Headway Homes Fund
- Hospice Niagara Fund
- \* Howard V. Staff Memorial Fund
- Joan E Marlow Salvation Army Endowment Fund
- Joan E. Marlow YWCA Endowment Fund
- Joan Tovenati Fund
- John and Lillian Clark Fund
- Katey Marie Campbell Fund
- Luigi & Amelia Setacci Health Niagara Fund
- Mark Graham Memorial Endowment Fund
- Mayflowers Fund
- McNally House Endowment Fund
- Morabito Family Fund
- Necklaces of Hope Foundation
- \* Niagara Aboriginal Advancement Fund
- Niagara Survivor Services Fund
- Patrick & Nancy McNally Family Fund
- Rankin Cancer Run Foundation
- Red Roof Retreat Fund
- Upper Canada Lodge Auxiliary - Constable Family Fund
- Welland Hospital Foundation Endowment Fund
- Wellspring HOPE Fund
- Women's Place of South Niagara End. Fund

### Spiritual

- Assunta and Cesare Bonelli Fund
- Church of the Transfiguration Education Fund
- St. Giles Presbyterian Church CEVO Fund

### Donor Advised Funds

These funds appeal to donors interested in creating their own family foundation as they enable the donor to have ongoing participation in the selection of charities benefitting from their fund. Donors can also name successor advisors so that their legacy is continued by future generations. These funds can be established with a minimum donation of \$25,000.

- Andreana Family Trust
- Beatties Basics Anniversary Fund
- Bluevalley Foundation
- Brunatti-Dyment Fund
- Bush Family Fund
- Cornelius & Helen Vanden Top Charity Fund
- Donald & Barbara Fraser Family Endowment Fund
- George Darte Funeral Chapel Fund
- Gerald Kowalchuk Family Fund
- Grocholsky Family Fund
- Ida & Bob Gale Sr. Community Fund
- Retire-At-Home Services Endowment Fund
- Lynn and Kevan's Niagara Charities Fund
- Jordan Engineering Shared Blessings Fund
- M&N Walker Foundation
- Marchand Kruczynski Family Fund
- Morgan Funeral Home Community Fund
- Peter Partridge & Poppy Gilliam Family Fund
- Stewart Family Endowment Fund
- Sullivan Mahoney Endowment Fund
- Welland Flatwater Fund

### Donor Designated Funds

These funds provide on-going annual support to charities important to donors and their families. The minimum donation is \$10,000 per charity to be supported.

- Anonymous
- Adrie's House of Hope Fund
- Dr. Jaroslous and Mrs. Edith Czerevko Family Fund
- William and Mary Lu Ellis Fund
- Art & Val Fleming Fund
- Bob Gale Recreation Fund
- Cornelius & Helen Vanden Top Charity Foundation
- Hildebrand Lehn Family Fund
- Joan E. Marlow Fund
- Kiers Family Fund
- Lincoln County Fair Endowment Fund
- NCF Operational Endowment Fund
- Smithville and District Lions Club Fund
- Troup Family Memorial Fund
- Wills Family Foundation

*\*Represents funds created in 2015*

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Vision Financial Planning  
Christina Walker  
Brian and Sylvia Walker  
Christopher Walker  
Walker Industries Holdings Ltd.  
Tom Wall  
Bob and Dana Walters

Cynthia Ward  
Bill Warren  
Warren Crosbie Enterprises Ltd  
Holly Washuta  
Margan Washuta  
Ehab Wassif  
Rocky and Norma Weaver  
David Weeks  
Paul Weiss  
Sheryl Wherry  
Brody Whetham  
Cheryl White  
Kathleen White  
Doug and Sally Whyte  
Douglas Willford  
Ronald Williams  
Richard Williamson  
Christopher H. Wilson  
William and Dorothy Wilson  
Madeline Woodhead  
David & Lynn Wybrow  
Y.T.S. Productions Inc. o/a Magicuts  
Chris Yakymishen  
Blair Yauch  
Odette Yazbeck  
YMCA of Niagara  
Angelo and Carrie Zeffiro  
Hedy Ziesmann  
Paul Zimmerman  
Zonta Club of Niagara Falls

## MEMORIAL AND TRIBUTE GIFTS

During 2015, gifts were received by the Foundation in honour or in memory of the following individuals:

Francis Ballett, Ron Boutet, Julie Bowen, Buddy, Brenda Caplan, Bernice Caplan, Paul Caplan, Frank Caplan, John and Lillian Clark, Yvette Dittrick, Nancy Carol Dunn, Carmela Fabiano, Fleming Family, Tom Fancy, Ellaine Fefferman and Leo Turket, Arthur Fleming, Marina Hainer, Yvonne Hannigan, Doug Holloway, Holly, Frances Houslander, David Howes, Sean Jackson, Leon H. Keith, Leon Keith, Virginia Lasota, Lorraine Leyden, Eckhard Marr, John-Micheal Martin, Bart Maves Sr., Valentina McLeod, Patricia Meek, Mollis, Dr.John Palmer, Real Philippe, McKinley Rankin, Eckhard Regier, Joseph Reid, Bonnie Rosts, Dr. Richard Safranyos, Seamus, Stephen Souter, Howard Staff, Karen Stearne, Lena Stuart, Dr.Roberta Styran, Emma Tscherswitschke, Frank Vanderzwaag, Marilyn Walker, Mary Jane Waszynski, Bob Waugh, Matthew Zimmerman

## HERITAGE SOCIETY

Members of the society have included the Foundation in their estate plan making a real difference in our community's future. We would like to thank the following people who have named the Niagara Community Foundation in their will, donated a life insurance policy or will be donating the proceeds from their RRSPs:

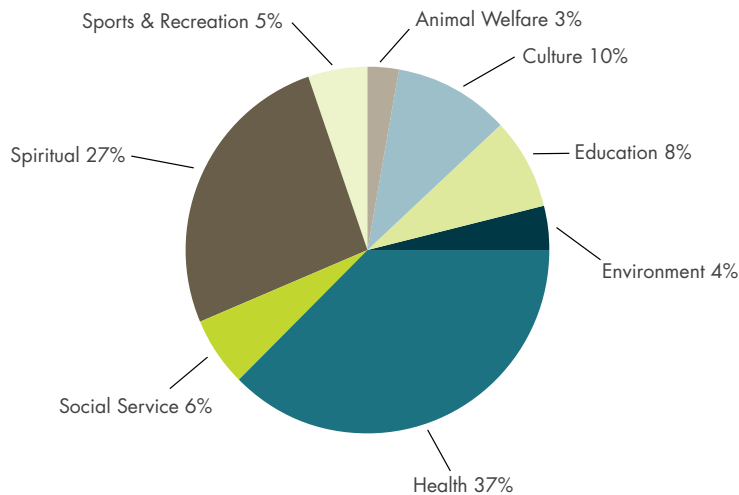
Debra Attenborough, Chris and Ann Bangham, Norm Bradshaw, Ann-Louise Branscombe, Elizabeth Connor-Elliott, John P. Cunningham, Barbara Davidson, Daniel Davidson, Sandra Durward, Robert C. Gibson, Roman Groch, Bob & Esther Hougham, Brad Hutchings, April Jeffs, Alan Jostman, Anne Kemp, Sharon Kirk, Rob & Christine Long, Mary Mauriello, Greg and Rena McDonald, Daryl Novak and Brian Harrison, Liz Palmieri, Cindy Paskey, Kathleen Summers and John Picken, Liz Powell, Mora Richmond, BJ Romans, Annemarie Rosenberg and Stephen Levy, David & Molly Simpson, Marc and Debbie Slade, Betty-Lou Souter, Dave and Sonia Stevenson, Virginia Stewart, Graham & Pearl Sweeting, Carl and Eileen Urben, Leona Vaillancourt & John Habuda, Robert and Kathie Welch, Doug and Sally Whyte, Hedy Ziesmann, Debbie Zimmerman

# FINANCIAL HIGHLIGHTS

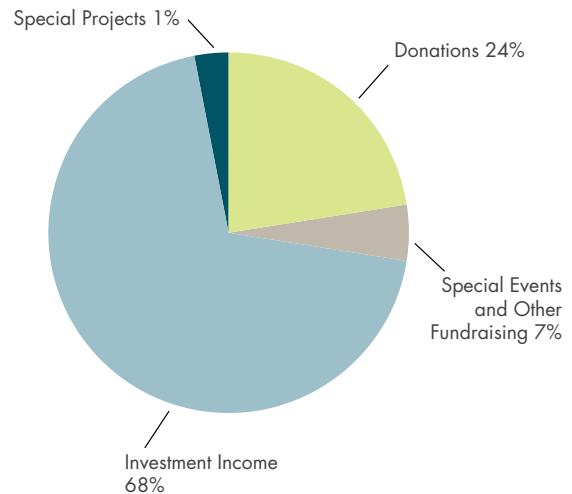
For the Year End December 31, 2015

|  | 2015         | 2014         |
|--|--------------|--------------|
| Total Assets                                 | \$28,967,043 | \$27,588,295 |
| Gross Fundraising and Event Revenue          | \$249,995    | \$343,627    |
| Total Donations                              | \$852,811    | \$2,551,636  |
| Total Revenue                                | \$3,613,545  | \$5,498,694  |
| Total Grants                                 | \$1,473,494  | \$1,111,589  |
| Total Charitable Programs                    | \$100,573    | \$77,130     |
| Total Special Projects                       | \$50,227     | \$251,830    |
| Total Fundraising Expenses                   | \$185,848    | \$261,528    |
| Total Administrative and Governance Expenses | \$395,459    | \$404,223    |
| Total Endowments                             | \$28,731,520 | \$27,294,015 |
| <br>   |              |              |
| % of Admin/Governance to Total Endowment     | 1.38%        | 1.52%        |
| % of Fundraising Expenses to Total Endowment | 0.65%        | 0.98%        |

## ALLOCATION TO GRANTS & CHARITABLE PROGRAMS



## SOURCE OF REVENUE \$3,613,545



To view the audited financial statements, please visit: [www.niagaracommunityfoundation.org/about us](http://www.niagaracommunityfoundation.org/about-us)

# FINANCIAL AND GOVERNANCE HIGHLIGHTS

## Governance

The Board's role is to set policy and to question, scrutinize and monitor the management of the Foundation's affairs. It is a role of governance as opposed to operational management. The Board's primary responsibility is to build and ensure sound management of the Foundation. It oversees the Foundation's management and ensures that the affairs of the Foundation are being conducted in a manner that achieves its goals, consistent with the Foundation's mission. The Board meets five times throughout the year plus a special meeting for strategic planning. The Role of Board and Executive and the Scope of Authority policies are in place to delineate responsibility between board and staff. The Board has also adopted a Code of Ethics and Confidentiality policy for board, staff and volunteers.

## Operations

The Foundation's staff is led by the Executive Director, who reports to an independent board of directors. Operating costs include asset development, charitable activities, special projects, administration and governance. The Foundation also received funding in 2015 from Niagara Region to support the position of Convenor for the Niagara Prosperity Initiative. This funding enables us to bring community groups together to guide poverty reduction initiatives.

Fund development, administration and governance expenses for the fiscal year ended December 31, 2015 totalled \$581,307. This figure does not include special projects that were funded separately from normal operating revenue. The expense of development activities is not necessarily related to the donations received in any one year and gift delays result in costs preceding the receipt of gifts by several years (for example, gifts in wills and life insurance). As a result, consistent with the community foundation sector, operating costs are evaluated by a ratio of total core operating expenses (excluding special projects) to total assets. For 2015, that percentage was 2.04% (down from 2.5% in 2014), which is within the range of community foundations of similar size and stage of development. Each endowment fund is charged a pro-rated administration fee of up to 1.25 per cent which helps to offset these expenses.

## Investment fees and returns

The bulk of the Foundation's investments are pooled with a number of other public foundations and charities in an investment pool with the Toronto Foundation (TF). This relationship has been in place since 2001 and is re-evaluated on a regular basis by the Investment Committee.

The endowments are invested according to the investment policy guidelines established by Foundation's board and are available at [www.niagaracommunityfoundation.org](http://www.niagaracommunityfoundation.org). All portfolios are managed by professional investment managers and in accordance with the policy.

## ASSET MIX AND TARGETS

| ASSET MIX                         | TARGET                     |
|-----------------------------------|----------------------------|
| Cash and cash equivalents         | 0 per cent to 50 per cent  |
| Equities and alternate strategies | 50 per cent to 95 per cent |
| Fixed income                      | 5 per cent to 50 per cent  |

The average investment fee paid for 2015 was 0.64 per cent for funds in the TF investment pool. The investment fee is charged monthly to each fund on a pro-rated basis. Investments returned 9.14% in 2015.

In November 2012, the board of the Foundation made a commitment to invest \$500,000 in the Community Forward Fund, a social finance investment fund. The initial draw on this investment took place in February 2014. As of December 31, 2015 the Foundation has invested \$348,980 in this fund. For 2015 the investment returns on this fund were 2.25%. The Board is willing to have a lower return because 100% of the capital is invested with non-profits and charities.

## FINANCIAL AND GOVERNANCE HIGHLIGHTS

### Risk management

The Board has a comprehensive risk management policy covering legislative and legal, fiscal performance, financial reporting, management of volunteers, effective management and governance, economic risk, and donor and volunteer stewardship. The Finance Committee annually reviews the Foundation's exposure to risk and mitigants to address perceived or actual risks. The Board regularly considers risk exposure as part of its deliberations. The price risk related to investments arises due to fluctuations as a result of changes in market prices whether those changes are caused by factors specific to the individual security or its issuer or factors affecting all securities traded in the market. Accordingly, the Foundation is exposed to the effects of the market fluctuations.

### Accreditation

In 2012, the Foundation received accreditation through Imagine Canada's Standards Program. The Foundation was one of the first community foundations accredited in Canada. The program offers a Canada-wide set of shared standards for charities and nonprofits wishing to enhance their effectiveness in the fundamentals of governance, paid-staff management, financial accountability, fundraising and volunteer management. The program includes a voluntary accreditation program for organizations wishing to publicly demonstrate they have successfully met the standards through a third-party peer review process.

### Evaluation

The Board has adopted a comprehensive annual process to evaluate its performance. The results of the evaluation are reviewed at its November meeting where actions to improve board performance are implemented. Moving forward the evaluation will be reviewed at the April meeting. This process is done on a biennial basis with Foundation committees. Employees of the Foundation participate in annual performance appraisals, which include on-going review throughout the year. The Executive Director's review is presented annually to the Board by the Board Chair.

### Compensation

The Board has established salary ranges for each of the Foundation employees. The ranges are determined based on reviewing similar positions within the community foundation sector across Canada as well as similar positions within Niagara. Ranges are adjusted regularly to reflect cost of living changes. Movement through the range is dependent on performance. For 2015, the Executive Director received a salary of \$101,954.

### Board recruitment, orientation and training

The Bylaws of the Foundation set out the Board recruitment process. Members of the Nominating Committee are selected by virtue of office and include the Immediate Past Chair of the Foundation Board, the current Chair of the Foundation Board, Niagara Regional Chair, the President or designate of the United Way of St. Catharines and District, the United Way of Niagara Falls and Greater Fort Erie, and the United Way of South Niagara, a designate of the Greater Niagara Chamber of Commerce, and the President of Brock University or the President of Niagara College. Nominees from across Niagara are identified based on current board attributes and future strategic needs. The Board is comprised of 17 members who are elected for a three-year term, which can be renewed once. The term can be extended if a director is serving as the vice-chair, chair or past-chair.

New directors take part in a formal orientation program. Board training takes place at each meeting and additional opportunities are provided throughout the year for members to participate in professional development provided by Community Foundations of Canada.



# THANK YOU TO OUR SUPPORTERS

The contribution of time and talents of our volunteers, donors and staff is the 'intangible wealth' of the Foundation. Starting in 2012 we began tracking the number of hours our volunteers contributed. Last year they contributed 1,521 hours, and based on \$15/hr hour, this gift works out to almost \$23,000 in support! Thank you so much for this contribution of time and talent.

## Board of Directors

Dino DiCenzo  
CEO, Canadian Niagara Hotels and Entertainment Inc.

Mario Ferrara  
Vice Chair, Ontario Financing Authority

Jessica Friesen  
President, Gales Gas Bars Ltd.

Rich Gark  
Retired, Scotiabank

Damian Goulbourne  
Professor, Niagara College

Jim Howden  
Retired, HSBC Bank

Jodi Lycett (*Past-Chair, Treasurer*)  
Partner, Durward Jones Barkwell & Co. LLP

Michael Mann  
Partner, Lancaster Brooks & Welch LLP

Rosanne Marsh  
Retired educator

Scott Maskell  
Vice-President, Glenny Insurance Brokers Ltd.

Janet St. Amand  
CEO, YMCA of Niagara

Sharon Svob  
Retired, fund development voluntary sector

Ruth Todd  
Partner, KPMG

Bob Watson (*Vice-Chair*)  
CEO, PenFinancial Credit Union

Doug Whitty  
President, 13th Street Winery and Whitty Farms

Madeline Woodhead (*Chair*)  
Investment Advisor, Scotia McLeod

## Ambassadors

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Margaret Andrewes, Eric Gilbert, Don Knechtel, Wendy Rittenhouse

### PELHAM FUND ADVISORS

Mayor Dave Augustyn, Mel Groom, Carolyn Mullin, Liz Palmieri (Staff)

### PORT COLBORNE FUND ADVISORY COMMITTEE

Claudia Brema (Chair), Dave Elliott, Rosanne Marsh, Liz Palmieri (Staff), Rob Steven, Gary Talosi, Darlene Tuck, Christopher Wilson

### ST. CATHARINES FUND ADVISORY COMMITTEE

Sharon Borgmann, Mark Brohman, Liz Palmieri (Staff), Peter Partridge Jr. (Chair)

### WAINFLEET FUND ADVISORY COMMITTEE

Lori Heemsker, Stan Pettit, Kelly Robson (Chair), Sharon Svob, Liz Palmieri (Staff)

### WELLAND FUND ADVISORS

Damian Goulbourne, Michael Grocholsky, Jeff Neill, Liz Palmieri (Staff), Aulf Robitaille, Deanna Vilella, Madeline Woodhead, Deb Zahra

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John Fisher, Damian Goulbourne (Chair), JoAnne Krick (Staff), Mike Lethby, Rick Merritt, Liz Palmieri (Staff), Jennifer Sinclair (Staff), Janet St. Amand, Madeline Woodhead

### EXECUTIVE DIRECTOR RECRUITMENT, COMMITTEE

Jessica Friesen, Damian Goulbourne, Jodi Lycett, Vince Polce, Janet St. Amand, Bob Watson, Madeline Woodhead (Chair)

### FINANCE COMMITTEE

Dino DiCenzo, Judith Hill (Accountant), Laura Hills, Jodi Lycett (Chair), Liz Palmieri (Staff), Sheri Penner, Ruth Todd, Bob Watson, Brian Wilkie

# THANK YOU TO OUR SUPPORTERS

## GOVERNANCE COMMITTEE

Jodi Lycett, Liz Palmieri (Staff), Bob Watson, Madeline Woodhead (Chair)

## GRANTS COMMITTEE

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## NOMINATING COMMITTEE

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## AU MARCHÉ ADVISORY COMMITTEE

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## MY STORY WRITERS

Judith Barker, Maureen McRae, Debi Pratt

## RANDOM ACTS OF KINDNESS COMMITTEE

Lauri Brady, Marisa Brown, Lesley Calvin, Nick Cicchino, Tamara Coleman-Lawrie, Filomena Goldsworthy, Amy Hollingsworth, Sylvia Iammarino, JoAnne Krick (Staff), Peter Kryger, Carrie Noell, Melanie Olah, Deborah Ogilvie, Deanna Pope, Jeff Sinclair, Kristen Smith, Ryan Treanor

## RANDOM ACTS OF KINDNESS SPONSORS

Brock University, Centre de santé Communautaire Hamilton/Niagara, District School Board of Niagara, Giant FM 91.7, Greater Niagara Chamber of Commerce, Starbucks, Fallsview Casino Resort & Casino Niagara, Meridian Credit Union, Niagara Catholic District School Board, Niagara College, Niagara Peninsula Energy Inc., Niagara Region, Niagara Worship Centre, PenFinancial Credit Union, The Review, The Standard, The Tribune, TV Cogeco Niagara, United Way, Walker Industries, YMCA of Niagara

## CANADA GOAT OPEN GOLF COMMITTEE

Barry Brady, John Corfield, John Fisher, JoAnne Krick (staff), Bob Martin, Maria Menechella, Bob Nadon, Bruce Peters, John Potts, Jeff Roy, David Scott, Bruce Ward

## 14TH ANNUAL CANADIAN BUSINESS LEADERS BREAKFAST SPONSORS

Business Education Council, ReSolve Asset Management, Greater Niagara Chamber of Commerce, KPMG, Meridian Credit Union, Niagara Peninsula Energy Inc., Niagara Workforce Planning Board, The Review, The Standard, The Tribune, TV Cogeco

## OTHER SUPPORTERS

Robert Nowell Photography, City of Niagara Falls – Sleep Cheap Charities Reap event participants, City of Welland – Mayor's Gala, Durward Jones Barkwell and Co. LLP, Loud+Clear, Martin Sheppard Fraser LLP, Osborne Wolfe Wealth Management, Premier Impressions, Sullivan Mahoney LLP, The Brain Farm

## STAFF

Liz Palmieri (Executive Director), Orla Fitzpatrick Newhouse (Administrative and Donor Services Co-ordinator), JoAnne Krick, (Community Initiatives Manager), Judy Hill (Accountant), Chris Bangham (Asset Development Associate), Jennifer Sinclair (Niagara Prosperity Initiative Convener), Bea Taylor (Office Volunteer)



SMART & CARING  
COMMUNITIES



The Standards Program Trustmark is a mark of Imagine Canada used under licence by Niagara Community Foundation.

# THANKS

TO THE FOLLOWING FOR SPONSORING OUR ANNUAL REPORT

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# MAKE YOUR MARK

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YOUR **COMMUNITY**. YOUR **CAUSE**.  
YOUR **NAME**.



The **Make Your Mark** initiative invites Niagara residents to create an endowment fund to begin their legacy today and support their community for generations to come. It's a great way to celebrate Canada's 150th.

Give forward by giving back with an endowment fund that produces income to support community causes that mean the most to you.

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NIAGARA  
COMMUNITY FOUNDATION

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Email: [info@niagaracommunityfoundation.org](mailto:info@niagaracommunityfoundation.org) [www.niagaracommunityfoundation.org](http://www.niagaracommunityfoundation.org)