

**2015**

**OAKVILLE  
COMMUNITY  
FOUNDATION**

# **IMPACT REPORT**

**BUILDING BRIDGES  
TOGETHER**

**CONNECTING PEOPLE WHO  
CARE TO CAUSES THAT MATTER.**



**oakville  
community  
foundation**



DEVELOPED IN 2015

## a new strategic plan

In 2015, The Oakville Community Foundation developed a three-year Strategic Plan: *Building More Effective Philanthropy*. This plan for 2016 - 2018 is rooted in the following values:

- Leadership
- Collaboration
- Knowledge & Innovation
- Integrity
- Respect

We have established specific goals in four strategic areas:

1. Effective Philanthropy
2. Stability & Growth
3. High Performance Organization
4. Community Impact

In 2015, we immediately started creating the path to achieving our new Strategic Plan goals. To learn more about our 2016-2018 Strategic Plan, **visit [www.theocf.org/about/publications](http://www.theocf.org/about/publications)**.

**VISION:** Build a healthy, vital community where everyone has a sense of belonging, and the opportunity to connect, contribute and realize their potential.

**MISSION:** Invest the generosity of caring residents to build opportunity for generations.



2015

## a year of building bridges

*The year 2015 was a year of building. Building on our history, building our knowledge and building plans for our future. 2015 was notable for the change in The Foundation leadership, the release of a new edition of Vital Signs® and the launch of our new three year Strategic Plan.*

### **Building on our strong foundation**

This is a time of transition for The Foundation; this annual report is the first for Wendy who joined the Foundation in September 2015 and the last for Nick, who is completing his term as Chair of the Board.

In 2015, we started to build on the legacy of our first 20 years; a strong foundation of knowledge and success. We said goodbye to our CEO of the last 11 years, Rusty Baillie, whose commitment and passion for Oakville built a strong foundation. Total investments managed by the Foundation grew to \$100 million from Fundholder gifts and Agency pooled funds. The \$100 million in investments was an aspirational goal of the Board achieved as part of Rusty's legacy.

### **Building a vital community for all Oakville residents**

During 2015, to understand our Town's current and future needs, we researched and produced our fourth edition of Oakville's Vital Signs.

We discovered *A Community of Contrasts*. While home to the very affluent, Oakville is also home to the less fortunate; people facing real and pressing problems. Oakville is home to the lowest and highest incomes in Halton Region. With a better understanding of our local realities, we can work with partners to make sure everyone can fulfill their potential.

In 2015, the Governor General visited Oakville to shine a light locally on the collective efforts being undertaken to welcome Syrian refugees. At the behest of a Fundholder, we established our newest Fund, the Oakville Resettlement Fund. Through this Fund, we will make grants to registered charities that are playing a role in refugee resettlement issues, needs and solutions in Oakville.

### **Building a legacy for the future**

In the fall of 2015, we also released our new three year Strategic Plan, *Building More Effective Philanthropy*. The new plan bridges our organization's strong history, and the knowledge we gained from the Vital Signs Report, to a proactive guide for the next three years.

**We're building bridges through collaboration across our community to connect caring Oakville residents to causes that matter.** We welcome our 10 new Fundholders to our family of Fundholders, and want to thank them all, including our community partners and sponsors, for being part of the work to build a more effective philanthropic sector.

Nick Jelinek, Chair | Wendy Rinella, CEO



BRIDGING KNOWLEDGE

# Vital Signs 2015 report

*Following six months of in-depth research, consultation, and analysis, we released the 2015 Oakville Vital Signs Report in October. The report sheds light on our “Community of Contrast”, with four key issues affecting the quality of life in Oakville*

## **Bridging the equity gap**

Oakville is home to the highest and lowest incomes in Halton Region. One in 10 children lives in poverty.

## **Housing for everyone**

Affordable housing is hard to find in Oakville. We have the highest proportion of households in Halton Region who are spending more than 30% of their income on shelter.

## **Better mental health**

More Oakville residents are seeking treatment for mental health issues. In 2014-15, over 225 Oakville residents accessed services from Halton Women’s Place shelter. The Reach Out Centre for Kids (ROCK) served 1,016. It’s stated that 1 in 4 Older Adults are living with an illness or mental problem.

## **From diversity to inclusion**

Oakville is becoming increasingly more diverse. 31% of Oakville residents are immigrants and 24% are visible minority.

The Vital Signs Report has helped us identify the key issues and gain insights into the activities agencies are already engaged in to tackle them. We are now working to develop collaboration - through our *Creating Vital Solutions* initiative - across the community. Solutions that will create real change in our community.

*The following three stories showcase some of the work that is already underway to address local issues, including the equity gap, housing and mental health.*

## **VitalSigns® 2015 PILLARS**





## VITAL GRANT STORY

# Homeward Bound Halton

### *Protecting vulnerable families – and the future of the community*

One of the key issues facing homeless or marginally housed people is the difficult task of “transitioning away from homelessness”, according to Tyler Frederick of the University of Ontario Institute of Technology. Easing this difficult transition is the focus of Home Suite Hope: the organization that helps single parent families who are either homeless or precariously housed to stabilize their lives and get back on their feet.

“In Oakville, we have a marked lack of equity in terms of housing options available to low income families. This shortage leaves low-income, single parent families with a choice between sub-standard housing or having to move out of the area; a disgraceful dichotomy of choices,” says Michelle Pommells, President and CEO of Home Suite Hope.

“And there’s also an equity consideration when it comes to homeless or precariously housed children. These children are expected to function and learn as if they had a stable place to sleep and do their homework. It’s not a level playing field.”

The equity gap and lack of affordable housing are two local issues highlighted in The Oakville Community Foundation’s 2015 Vital Signs Report. These very real problems have damaging impacts on low-income families today and potentially, on the future of the entire community in the long-term.

Leveling the playing field is part of the work done by Home Suite Hope. For example, Home Suite Hope leads the Homeward Bound Halton program designed to help single mother-led families to secure well-paid jobs and escape poverty. The program provides housing for up to four years, a college education, job internships, fully-funded daycare and help with career placements.

Homeward Bound Halton is a program that has been made possible by the leadership and collaborative effort of strong community partnerships that include Halton Region, the Oakville Community Foundation, Sheridan College and Home Suite Hope. The Foundation has provided multi-year funding from their Vital Grants Fund, which was established to support new initiatives that move beyond symptomatic relief; transforming people’s lives to eliminate their reliance on social service agencies and become proud and self-supporting members of the community.

“The Homeward Bound Halton model recognizes that it takes time to rebuild your life – something that can’t be done when you’re in survival mode, moving from shelter to shelter,” explains Pommells. “To deliver this program we work cooperatively with existing organizations and government agencies to cover gaps in services in innovative ways that extend our reach.”

Understanding the amplified benefit of pooling resources, Home Suite Hope has also established an Agency Fund with The Foundation. With any Agency Fund, the capital is held for the long-term and invested – benefitting from The Foundation’s expertise and investment strategies. The income of the fund is distributed back to the work of the Fundholder, in this case, Home Suite Hope.

“An Agency Fund is a smart way of supporting an agency like ours. We benefit because The Foundation monitors our activity and holds us to account; Fundholders know they are supporting the best in strategic, transformative work,” explains Pommells. “Work that protects our community – including its diversity – and prevents it from becoming a place that is viable only for those with resources.”

### Highlights of The Foundation’s Support of Homeward Bound Halton

Two Groups of women – a total of 10 women – with 19 children among them – all benefitting from Homeward Bound Halton:

- In stable, affordable housing.
- Upgrading their academics.
- Developing computer, financial literacy, budgeting, parenting and other skills.

Some of the women have now moved on to the next level and are attending college and participating in job preparation clinics.



## AGENCY STORY

# Children's Aid Foundation of Halton Bridges The Gap

*Giving abused and neglected kids support, skills and a way out*

Imagine being 16 years old and living alone – not by choice – but out of circumstances outside of your control.

“Kids who have never previously been involved with the Children's Aid Society (CAS) who are 16 or older, even if they're homeless or being abused, are too old. They are not covered by the *Family Services Act* and cannot be helped by their local CAS,” explains Tina Blatchford, Executive Director of the Children's Aid Foundation of Halton (CAFH). “Providing support to help bridge that age gap between 16 and adulthood is just one example of where the CAFH directs funds.”

### Going beyond basic necessities for children and youth

The Children's Aid Foundation of Halton raises money in order to do more than provide basic needs, such as room and board provided by the Children's Aid Society (CAS) – and to support young people who wouldn't ordinarily qualify for CAS support. Funds from the CAFH allow the Halton CAS to provide programs designed to help children and youth build confidence and succeed; with an emphasis on education and life skills.

For example, the CAFH funds after-school tutoring to help children and youth achieve appropriate grade levels in reading and math and to keep them from dropping out before finishing high school. Stronger academic achievement instills positive growth and encourages children to feel self-confident.

The CAFH also provides bursaries; encouraging youth in care who have succeeded in completing high school to pursue post-secondary education. Other programs funded by CAFH include summer camps, recreational programming and life skills programs to better prepare teens for adult life.

Blatchford explains: “We are supporting kids who are in need because of abuse or neglect. Their circumstances are often related to issues of poverty and mental health – for example, depression and addiction. Parents and families are trying their best, but mental health, housing and the equity gap, are serious issues in Halton region.”

### Local support can lift local kids out of the cycle

The CAFH receives no funding from the government and is supported solely by donations from the community. To strengthen its financial base, the organization has established an Agency Fund at The Oakville Community Foundation.

With an Agency Fund, the capital is held and invested by The Foundation and the income generated is used by the CAFH to deliver programs and services; a partnership that goes beyond the scope of annual granting. CAFH values the role The Foundation plays, in the support of financial management of their Agency Fund, but also in linking partners and funders to issues that matter.

According to Blatchford, a relatively small donation will change a life – but without funding, the cycle of unemployment and of reliance upon social services will continue for these kids.

“A relatively modest donation can mean so much. For example, take those teens as young as 16 having to start up new lives independently. Just \$1,000 provides two young people with the basic necessities for getting set up in an apartment, including dishes, linens, cleaning supplies and ingredients for their first meal on their own.”

“The difference local dollars can make right here on your doorstep is incredible,” says Blatchford. “Our youth are the future of our community. Local youth who have experienced abuse and neglect need hope. And they need our support.”

The Halton Children's Aid Society received funding in 2016 for their “Bridging the Gap program” – a program to support youth who are homeless or at risk of becoming homeless.

Bridging the Gap serves an average of 250-300 youth per year in Halton.

“The donation means more youth will be able to have a roof over their head as the fund will pay for allowances for host homes and give individuals the opportunity to learn supportive, life-building skills and receive basic life necessities.” Youth Supervisor Steve Levac



Three Halton Healthcare Navigators

## AGENCY STORY

# Halton Healthcare Navigators

*Helping children in mental health crisis connect with the services they need*

Marco\*, an 8-year-old boy with separation anxiety, generalized anxiety disorder and obsessive-compulsive tendencies, had been avoiding school: he had not completed grade two education. He was unable to sleep alone and had difficulty playing with friends or participating in activities.

Without a Halton Healthcare Navigator, in addition to facing a mental health crisis, Marco and his family may have felt like so many other families do: completely lost, trying to navigate the mental health services and programs they need. But a Navigator connected Marco with a program to develop coping strategies, and referred his parents to relationship counseling and parenting support.

Navigators are trained counselors and social workers who reach out to families with children and youth up to 18 years of age in crisis. Navigators provide tools for coping in the short term, referrals to appropriate services, accompaniment to appointments, help with issues at school, home and in the community, and more.

In Ontario, one in five children and youth under 18 are struggling with a mental health issue. And only a fraction of those who need mental health services, receive them.

“Mental health services in Canada are typically a complex array of various agencies,” says Dr. Alan Brown, Chief and Physician Program Director for the Department of Psychiatry, Halton Healthcare. “Families and even service providers don’t know where to turn when they are in a despairing crisis. The Navigator program assists children and their families to find the right door and to ensure that they receive the treatment they need.”

Halton is one of the most underfunded regions for mental health programs in Ontario - a concern highlighted in the Oakville Community Foundation’s 2011 Vital Signs Report.

When the new Navigator program quickly proved successful, the Mental Wellness Network partnered with The Amarna Fund, an Endowed Fund held with The Oakville Community Foundation, to support the program in perpetuity via an endowment fund. Together, the two foundations created a matching program, whereby each dollar from the community is matched 1:1 from The Amarna Fund and 1:1.5 from the Network. The growing endowment fund is now managed by The Oakville Community Foundation, benefitting from the expertise and investment strategies The Foundation has in place.

“The kids we see feel stuck and believe this is going to be their life,” says Navigator, Tinga Heusser. “This is not a reflection of their ability. It is a reflection of the situation they are in.”

Marco and his family were able to make positive changes to their situation. His parents feel stronger in their relationship with each other and they feel empowered; better equipped to help their child.

Marco is now sleeping independently, has reduced anxiety and is able to participate in activities (such as visits to the park or to Canada’s Wonderland) that used to cause him too much anxiety. Thanks to Navigator support, Marco received timely care, which his parents feel, “saved their family”.

*\*Name changed for privacy*

In 2009, a private foundation, the Mental Wellness Network, pledged \$1.25 million to seed a program designed to close the gaps between kids in crisis and the mental health support they need.

# connecting the needs of charities to the passions of Fundholders

*In 2015, we started making changes to our granting program to put dollars to work in the community as quickly as possible, have a bigger impact, and increase collaborations with internal and external funders.*

**Changes Made in 2015:**

- We have moved to a single community granting round per year, with timing that is optimized for charities (2015).

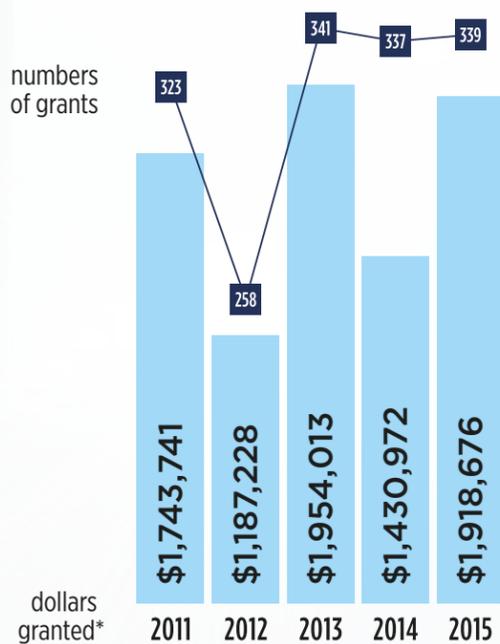
**Announced and Implemented in 2016:**

- Grant requests can be up to a max of \$10,000 for a single applicant and \$20,000 or more from a collaborative.
- We now offer funding for operating needs.

As part of our Strategic Plan, we are working to double the local granting dollars we provide by 2018.

number of grants & total granting

\*Total grants reflects amount after prior year grants returned.



agency fund disbursements



grants total by areas of focus

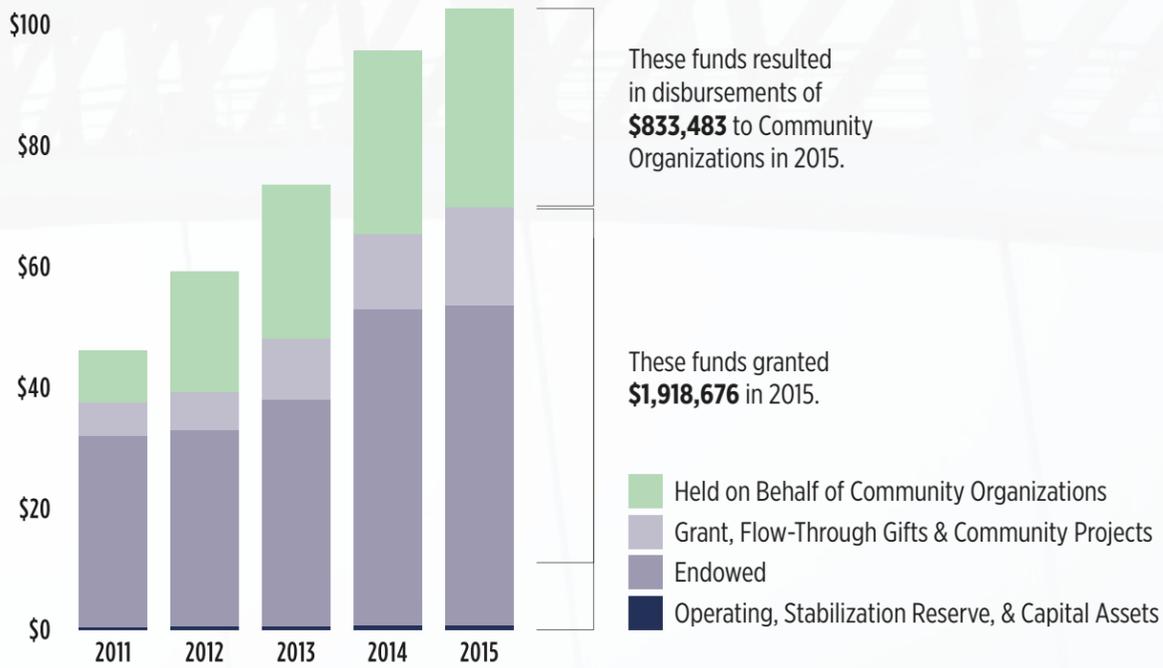


	Fundholder Grants	Community Grants
Arts & Culture	\$49,598	\$8,000
Educational	\$153,599	\$6,000
Environmental	\$45,000	\$9,014
Health & Fitness	\$744,655	\$17,750
Social Services	\$855,560	\$29,500
<b>Totals</b>	<b>\$1,848,412</b>	<b>\$70,264</b>

# fund stewardship & prudent investment

The complete audited financial statements, as of December 31, 2015, are available on our website at [theo.cf.org/publications](http://theo.cf.org/publications)

fund balances by type (millions)



asset mix



## investment returns

	Annualized Returns	Benchmark
3 Year	<b>9.2%</b>	<b>7.7%</b>
5 Year	<b>8.0%</b>	<b>6.0%</b>
10 Year	<b>6.2%</b>	<b>4.1%</b>



## transparent & efficient

The data presented here is based on the cost allocations supported by The Foundation's mandatory regulatory filings with the Canada Revenue Agency.



Grants	53.3%
Charitable Works	20.7%
Investment	18.0%
Administration	5.0%
Fundraising	3.0%
<b>Total</b>	<b>100.0%</b>

## we are efficient

Administration as % of Assets	
Investment Management	<b>0.9%</b>
Administrative Costs	<b>0.2%</b>
<b>Total</b>	<b>1.1%</b>

BRIDGING UNDERSTANDING

# oakville community foundation board and committee members



## Board of Directors 2015 – 2016

(Back row Left to Right) Gerry Popp (V.Chair), Terry Jackson (Past Chair, Community Foundations of Canada), Jeff Black (Chair, Investment), Tim Zahavich (Front row) Joanne Peters, Nick Jelinek (Chair), His Excellency the Right Honourable David Johnston, Governor General of Canada, Wendy Rinella (CEO) Bruce Galloway

*Photo courtesy of Kay Woollam Photography*

**Audit Committee** | Ian Cockwell | Jim Collins | Doug Gray | Ren Henderson | John Mitchell\*\* | Stefano Zuliani

**Community Legacy Building Committee** | Ren Henderson | Jim Rager | Mags Shorey\*\* | Brian Hanna  
Joanne Peters | Bruce Galloway | Nick Jelinek

**Finance & Risk Committee** | Frank Canis | Chuck Havill | Ren Henderson\*\* | Frank Lochan | Jonathan Flawn

**Governance Committee** | Brian Hanna\*\* | Gerry Popp | Mags Shorey | Michael Whitcombe | Tim Zahavich

**Investment Committee** | Jeff Black\*\* | Ian Cockwell | Loren Francis | Terry Jackson | Frank Lochan | John Mitchell  
Peter Willis | Kriss Bush | Mike Miller

*\*Committee members are those serving on a committee in 2015. \*\*Indicates Chair of the Committee*



## Foundation Staff (left to right)

Alison Moeller, Judy Bonifacio, Carolyn McDougall,  
Wendy Rinella, Aldis van Warmerdam, Sarah McPherson,  
Frances Pace, Lori Armitage



## In memoriam

We recognize and honour the following Fundholders, Friends and Volunteers of The Foundation, who have passed away in 2014 or 2015. Their legacies live on in our memories, through the time, talent or treasures they left with The Foundation to support Oakville residents in need.

**David Peter Kenny**  
**Peter Allen**  
**Hugh Beaty**  
**Gord O'Reilly**

## BUILDING ON LEGACIES

# significant milestones in the 20<sup>th</sup> year of The Foundation

- Recipient of The Oakville Chamber of Commerce Charity or Not-for-Profit Excellence Award
- New three year Strategic Plan - *Building More Effective Philanthropy*
- Fourth Edition of Oakville's Vital Signs report
- Established the Oakville Resettlement Fund
- Final Marathon of Golf - 17 years of crazy fun golfing - all in support of The Foundation's work supporting the charitable sector
- Retirement of Rusty Baillie, CEO - 11 years of dedicated service to the community
- Welcoming the new CEO - Wendy Rinella
- Historic visit of His Excellency the Right Honourable David Johnston, Governor General of Canada - maiden speech on Welcoming Syrian Refugees: A Community Effort - First joint venture event with The Oakville Chamber.



Photos included in this report are courtesy of Kay Woolham Photography, Rolly Astrom Photography and community partners

# thank you to our 2015 corporate supporters



## ABOUT THE OAKVILLE COMMUNITY FOUNDATION

The Oakville Community Foundation is a conduit between the passions of philanthropic families and organizations, and the needs of the community - making Oakville a better place to live, work, learn and grow. We support individuals, families and corporations who come from all walks of life, economic backgrounds and charitable interests but they have one thing in common - a desire to make a difference today and leave a legacy tomorrow for Oakville - a desire to be part of a smart & caring community.

A proud member of the

BROUGHT TO  
YOU BY THE

191

COMMUNITY  
FOUNDATIONS  
OF CANADA



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