



# 2016

Oakville Community Foundation

## IMPACT REPORT

Connecting & Belonging



oakville  
community  
foundation



Leadership Message

# 2016 | Creating a sense of belonging

**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.



What does it take for people to feel that they belong? That they can prosper in Oakville? This is a question we have been answering over the last year at the Oakville Community Foundation.

The year 2016 has been a year of taking action based on the plans we made and the data we uncovered in 2015. This was the first year of rolling out our 2016-2018 strategic plan and the first year of addressing the issues we identified in our 2015 Vital Signs Report®.

## Recognizing Oakville's history – and creating an inclusive future

As Canada marks its 150th anniversary in 2017, we're mindful of the role we, as a Foundation, need to play in recognizing the true history of the land on which our Town was built. We're creating a leadership space as part of Oakville's first steps in Truth & Reconciliation. And while we seek to acknowledge Oakville's Indigenous people, we also want to create a sense of belonging for our community's newest, most challenged and most vulnerable members.

## Delivering on our plan

Our Strategic Plan, *Building More Effective Philanthropy*, is rooted in the values of leadership, collaboration, knowledge and innovation, integrity and respect. This means that in addition to being a back office to support philanthropy, we are increasingly a leader and a resource for the community. We have been strengthening the stability of our own operations to allow us to reach further and find means to create more significant impact; building better philanthropy in Oakville as a result.



## Addressing Oakville's needs, Fundholders' passions

In our 2015 Vital Signs Report®, we identified four priority issue areas: housing, diversity and inclusion, mental health and the equity gap. In 2016, we followed up on the data we have collected, taking action and forming partnerships with local organizations to create the solutions Oakville needs. We also invested time in connecting more deeply with our Fundholders in 2016, to understand how you'd like to participate and communicate with us and the issues that matter most to you.

*In this report, you'll learn about the research, granting, collaboration and engagement activities of 2016; the highest granting year in the history of our organization.*

The Oakville Community Foundation is strong because our community is supporting us and we're working to address the needs of our community more effectively than ever before. For everything we've been able to do, we want to thank all of our Fundholders, sponsors and community partners. We can't build without you; you are our foundation.

Gerald Popp, Chair | Wendy Rinella, CEO



Reporting Back

# 2016 | Strategic Plan Progress Update

In 2015, we developed a three-year Strategic Plan, *Building More Effective Philanthropy*, with specific goals in four strategic areas:

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

In the following pages, we'll show you how we're following the plan and provide examples of the progress we've made toward our goals in 2016.



## ONE | Building Effective Philanthropy STRATEGIC GOAL | ON OUR WAY

### Goal

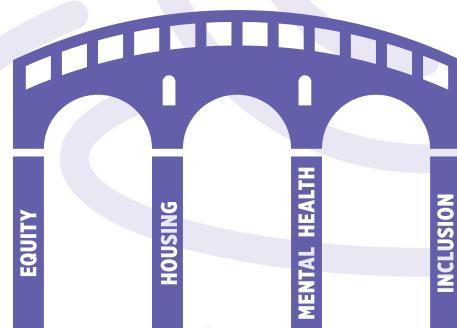
- Lead the development of collaborative solutions for four important local issues

### Creating Vital Solutions

Our 2015 Vital Signs Report<sup>®</sup> identified four key issues affecting the quality of life in Oakville. In 2016, we started leading the development of collaborative solutions, bringing community partners and leaders together around these issues.

Central to creating real change in our community is a multi-year research and creative problem-solving project with Sheridan College: the "Community Ideas Factory". Sheridan secured funding for this project from the Social Sciences and Humanities Research Council's Community and College Social Innovation Fund and we are their lead partner.

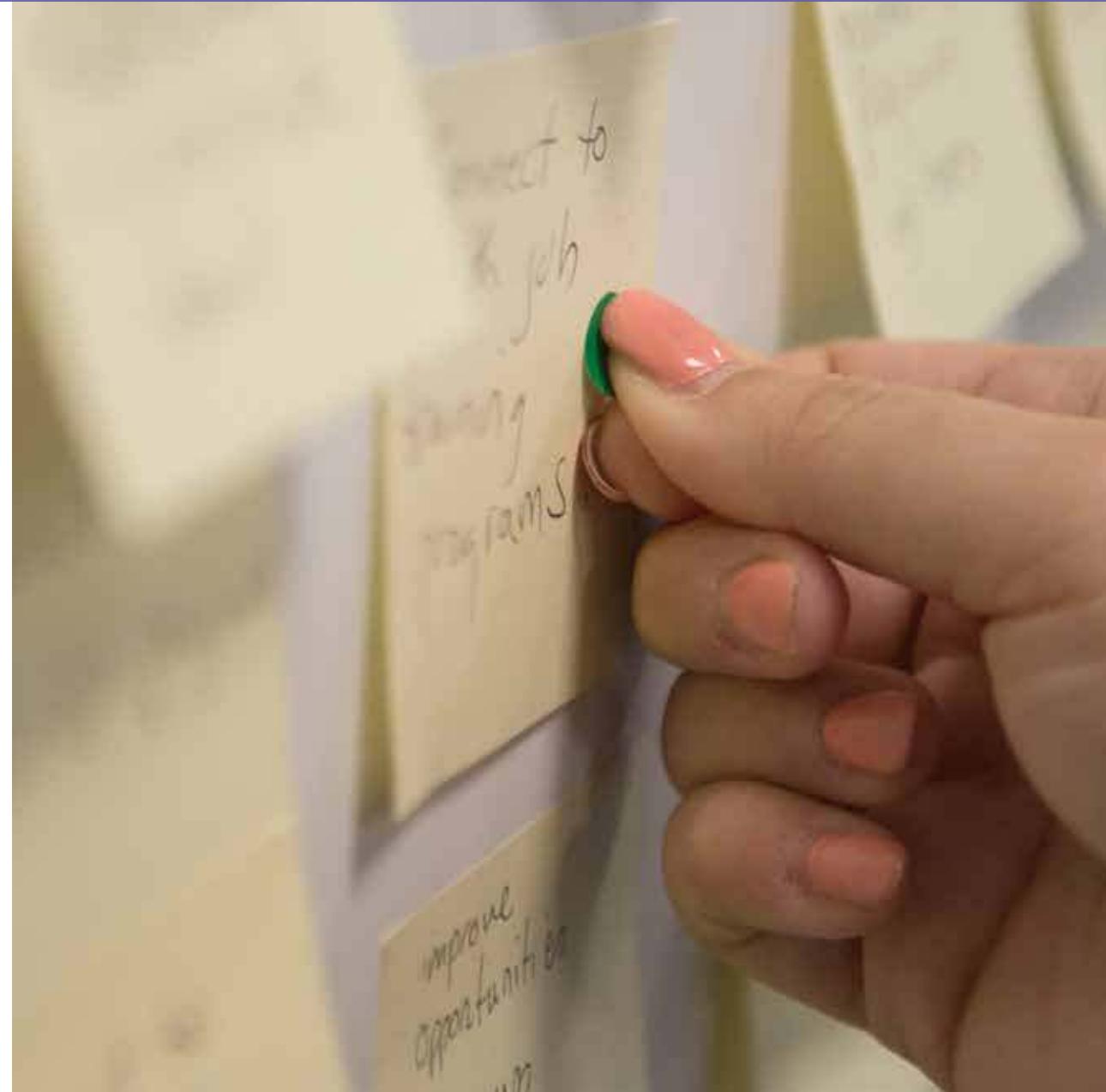
### VitalSigns<sup>®</sup> 2015 PILLARS



### Creation of Halton Granter's Roundtable

Starting in 2016, organizations across the Town of Oakville and the Region of Halton who provide grants to charities have been meeting to identify ways that we can collaborate, address priority needs in the community and create a more substantive impact to benefit local charities and the people we serve. Members include representatives from all levels of government, business and community and service group organizations.

This voluntary network of grant-makers was born out of conversations that began in Oakville, and the Oakville Community Foundation serves as the convener.



### Launch of Resettlement Fund

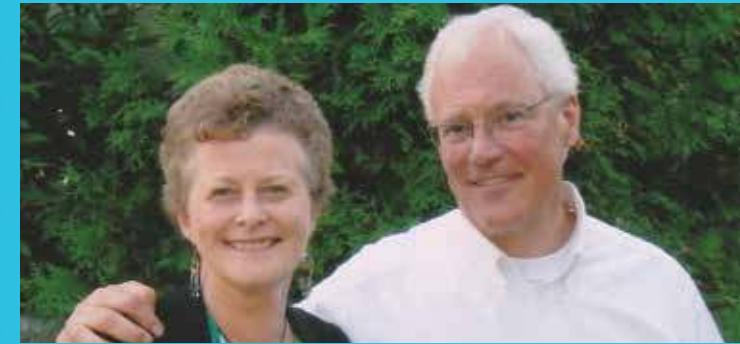
In response to the Syrian Refugee Crisis and at the request of our Fundholders, we established a new fund in 2016: the Oakville Resettlement Fund. Early in the year, we announced \$15,000 in initial funding for subsidized bus passes, which today has amounted to just over 300 bus passes being distributed.

In June of 2016, we also announced a further \$60,000 in grants to registered charities who are playing a role in refugee resettlement issues, needs and solutions in Oakville.



## Donor Story

# Honouring her husband's legacy with a gift of education



After her husband John passed away, April Macdonald found herself responsible for implementing the philanthropic plans they had made together. She knew what causes they had identified together but had no experience with philanthropy.

“John was a self-made man who came from humble beginnings,” says April. “I wanted to honour his belief that education is the key to making change happen, and address his frustration with the barriers faced by members of the Indigenous community.”

April's brother-in-law Terry Jackson, who had been deeply involved with the Oakville Community Foundation for years, connected her with the organization. A key role of The Foundation is to work with individuals and families; to understand their interests and find innovative ways to make their financial contributions count. April asked The Foundation team for help with creating a meaningful contribution and legacy for her late husband.

“I just told the team at The Foundation that John and I wanted to support education for Indigenous students. They completely took it from there and came back to me with a list of schools and programs we could fund,” explains April. “With The Foundation's guidance, I decided to create an award at the University of Winnipeg.”

April selected the University of Winnipeg as a recipient because of their Community-based Indigenous Teacher Education Program and because of the additional support they provide to students living away from home through their Access Program. Working with the Oakville Community Foundation, she established the John K. Macdonald Memorial Fund Award in Education.

“The Award was designed to go to an Indigenous student who is enrolled in the Faculty of Education and who has a keen interest in using their education to benefit their community and position themselves as a potential role model for others,” says April. “Our goal is that this award alleviates a student's financial strains, positively influences their future and has a ripple effect on future generations.”



Since the Memorial Fund was established and awarded in 2015, April has had the opportunity to meet the recipient student, Donna, and see the difference the funding is making in her life. Donna is already teaching part-time in a school that serves many Indigenous children and is committed to making a difference in her community.

“Giving through the Oakville Community Foundation has been a terrific experience. The Foundation team manages my fund and does all of the legwork for ordinary people like me who just don't know where to start. I'd recommend working with The Foundation for anyone trying to find a vehicle for their donated dollars and get the tax benefits of doing so,” says April.

*“I'm looking forward to getting even more involved with The Foundation and more involved with the local issues. It's a wonderful community of people working hard to make a difference and it's a real win-win for those of us who want to make an investment in the future, in people.”*  
April Macdonald



## Donor Story

# A family's mission to help everybody in the community to prosper



When the Kenny family moved to Oakville from Sudbury back in 1986, they brought with them their long-standing interest in helping to address community issues.

“Joanne and I have a background of growing up in small communities where the culture is to look after your neighbours and support your community,” explains Peter Kenny. “And when we moved to Oakville, we were living close to Don and Marilyn Noble, The Foundation’s first Fundholders. They introduced us to the Oakville Community Foundation in its very early days.”

According to Peter, the family’s goals, which include a focus on education and helping people to be self-supporting, aligned very well with the Oakville Community Foundation’s work. When the Kenny’s established their family fund, it was during a community-matching program; any new funds established were matched by the existing Amarna Fund.

Over the years, and as their fund has grown, the Kenny family has supported projects in many areas including family violence, poverty, and Indigenous initiatives. They have provided financial support to international, national and local organizations including Halton Women’s Place, the Oakville YMCA, and Kerr Street Mission.

Today, the family’s philanthropy is led by son, Paul Kenny: “The work is very challenging, because if you do it right, you put your heart and soul – your aspirations for a better world – into it. But it’s very rewarding and well supported: The Foundation administers the granting for us very well. They take care of all of the financial and back office work so we can focus on operationalizing our mission.”



Like his parents, Paul is passionate about Indigenous issues, including the need for residents of Southern Ontario to understand Indigenous history, issues and the solutions needed to address them.

*“The Truth and Reconciliation Commission started to crack consciousness and the Oakville Community Foundation is keeping that image and knowledge present. They are taking this conversation to the community, making sure it’s recognized, stays top of mind and that we move forward,” says Paul Kenny.*

“This is a role of The Foundation that we value as a family; they highlight what the social issues are and what needs to be done to create a better, more inclusive community so everybody can prosper.”



Taking steps toward Truth & Reconciliation

# Oakville's Moccasin Trails



Understanding the Indigenous history of Oakville is an important part of the local Truth and Reconciliation process. In 2017 Canada marks its 150th anniversary, and Oakville marks 160 years, but the area's first people lived here more than 9,000 years ago.

Though the Town of Oakville was founded in 1857, for thousands of years, people have lived in this location on the shores of Lake Ontario at the mouth of Sixteen Mile Creek and Bronte Creek. These Indigenous communities in Oakville have included a number of different horticultural societies over the last two millennia and, going further back thousands of years, migratory people who subsisted on hunting, gathering, and fishing in the area.

A new educational initiative, proposed by local elder Stephen Paquette, undertakes to highlight Oakville's Indigenous history within the town's Heritage Trail system. The plans include:

- The creation of a **First Nations Information Station** located at the start of the Bronte Creek Heritage Trail
- Two **Moccasin Trails** – one on the existing Sixteen Mile Creek Trail and one on the existing Bronte Creek Heritage Trail – consisting of a series of 13 plaques containing Indigenous stories, verses and information relating to the land, water and sky.

The educational content for the plaques will be developed in partnership with the Mississaugas of the New Credit First Nation (whose traditional territory includes Oakville and extends around Lake Ontario from the Rouge River to the Niagara River) and other Indigenous community members.

“In this year of ‘Canada 150’, as an Indigenous person that supports the school systems, in sharing stories of the Residential Schools and adoption scoop among many other pains, I find it challenging to use the word ‘celebrate.’ However our teachings speak to carrying ourselves in a good way and so my contributions in this project are my humble gift to my new neighbours in Oakville and fellow Canadians,” explains Paquette.

***“This project will further educate the citizens and guests of Oakville as to the rich and vibrant history of the original people on whose lands we live and walk. It fills a gap of new knowledge and perspectives that is forever being unearthed and told with that authentic Indigenous voice.”***

According to Sarah Douglas-Murray, Senior Manager, Cultural Services, Recreation and Culture, the Town of Oakville has a history of marking milestones through public spaces, such as Centennial Square during the Centennial and, in partnership with the Oakville Community Foundation, the development of the 57 kilometer-long Heritage Trail system in celebration of the Millennium.

“To honour the beginning of the Truth and Reconciliation process, we will continue the work we started with the trail system, filling in gaps and bridging understanding of our area's first people,” says Douglas-Murray.

“Because Indigenous people were moved off the land that is now Oakville so long ago, there is low awareness of the Indigenous history of our area. We are a growing



community and we need all residents to understand our history, our place in it, and how we can move forward together.”

Funding for this initiative was provided through the Community Fund for Canada's 150th, a partnership between Community Foundations Canada, the federal government and The Foundation. In addition to funding, The Foundation is playing a networking, coordinating and facilitating role, bringing key contributors and community members together and making sure the process is inclusive. A goal for all involved is that this project opens up necessary dialogue and is in keeping with the Declaration of Action on Truth & Reconciliation.

“I hope that this project is just a start. At this point, I don't believe it's a destination, but rather a journey we can all take together with good hearts and good minds,” says Paquette. “I see it as a gift to my daughters, to show them, that as Indigenous people, we can make a difference in a good way and that our stories and culture are important to the fabric of Canada. My hope is that other municipalities and community partners will follow the light and wisdom of this project and in doing so, start that journey towards Truth and Reconciliation.”



## Matching Gifts

# An opportunity to grow your family's legacy



Dennis Blake's family knew that he loved his job as a teacher, but when he passed away in 2016, they were overwhelmed by what they learned about the impact he had made.

***"We were impacted by the words shared by Dennis' students and school principal at his memorial service and wanted to ensure that his memory and passion carried on," explains Dennis' brother, Noel.***

Noel approached the Halton Learning Foundation with the idea of creating a scholarship fund in his brother's memory. Noel's timing coincided with the launch of a new matching program offered by the Oakville Community Foundation; providing additional incentive for families to either establish a new fund or grow existing funds. By participating in the matching program, Noel was able to build the scholarship fund – and his brother's legacy – faster, helping more kids sooner.



Thanks to two generous memorial donations received from the estates of Doris Hyde and Victor William Jones, The Foundation's current matching gift program offers two unique opportunities:

- 1. New Fundholders** can contribute \$1,500 and receive a \$1,000 contribution from The Foundation to boost their new family fund.
- 2. Existing Fundholders** can contribute to their fund capital, and The Foundation will match those additions dollar for dollar up to a maximum of \$5,000. Participants in this program can choose where they would like to direct their granting dollars.

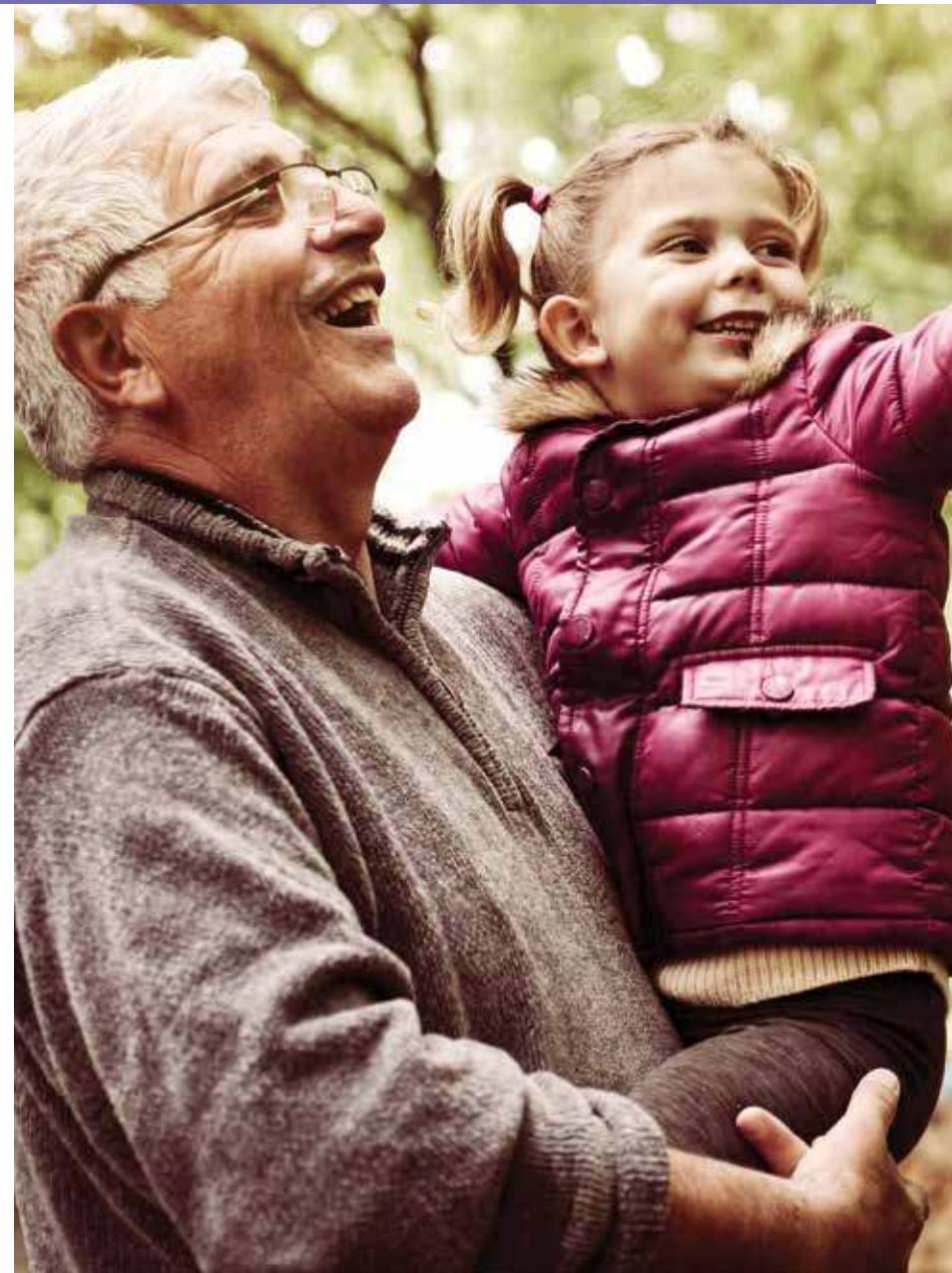
### Program attracts new philanthropic families

In addition to the Blakes, the program has already encouraged a number of new and existing Fundholders to build or grow their funds in 2016. These include Lyn O'Reilly in honour of her husband; Sam Piercey whose business family, The Budds Group, set up a Memorial Fund for him; and Len and Frances Pace.

Len and Frances wanted to create a family legacy in honour of their son Alex, who passed away in 2009 at age 11. They decided to create an endowment gift to support long-term sustainability for the charities and causes they wished to support.

***"We have helped to raise funds for capital building purposes, to create places and programs that we believe in. Once created, we wanted to ensure that these places and programs would continue to flourish in the long term. The endowments help that to happen," Len explains.***

"In our case, the matching gift program doubled the impact of the funds that were established, so the return on our investment doubled as well."



### Join our family of Fundholders, create and augment your legacy

Would you like to create or boost your family's fund and leave your impact on Oakville? You can join the Blakes, Paces and other members of our family of Community Fundholders.

"Now that the funds have been established, the annual income will continue to serve for many years after we are gone. In addition, we hope that now that the funds are established, others who believe in those same causes will have a simple and effective way to contribute to the long-term viability of the causes," says Len. "The matching program allows donors to benefit from the confidence that The Foundation provides while multiplying the impact of an individual's or organization's fundraising efforts towards causes that are near and dear."

To join our family of Fundholders and take advantage of the matching gift program, contact Sarah McPherson at [sarah@theofo.org](mailto:sarah@theofo.org) or Frances Pace at [frances@theofo.org](mailto:frances@theofo.org).

*\*This program is available until December 31, 2018.*

# 2016 | Investment & Fund Balance Oversight

The Foundation provides careful management of the monies given over to our care. These charts and graphs are a way of providing a clear and concise snapshot of our fund positions for the past year, as well as demonstrating our historical data.



## TWO | Stability & Growth STRATEGIC GOAL | ON OUR WAY

### Goals

- Build Endowment Funds for future needs
- Mitigate risk while maximizing investment returns
- Align our business model for stability and fund growth

### Strengthening our connection with Fundholders

To develop a greater understanding of our Fundholders and their interests, we conducted our first ever Fundholder survey in 2016. Among the key insights we learned is that our supporters want more opportunities to connect with charities they support and understand the impact of the funding they provide. We also began tracking the alignment of Fundholders' grants with key issues identified in our Vital Signs® 2015 Report.



### INVESTMENT RETURNS

## THREE | High Performance Organization

### Goals

- Review internal investment processes
- Make optimal use of our financial and human resources

### Optimizing our resources

We understand the importance of our role as stewards of our Fundholders' investments and contributions. That's why we continued to optimize our resources in 2016 including a review of our investment processes to maximize granting and the relocation of our office to a new, more suitable facility.

### Transparent & Efficient



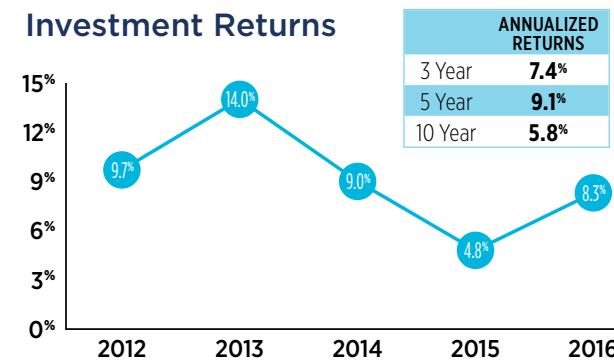
### We are efficient

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

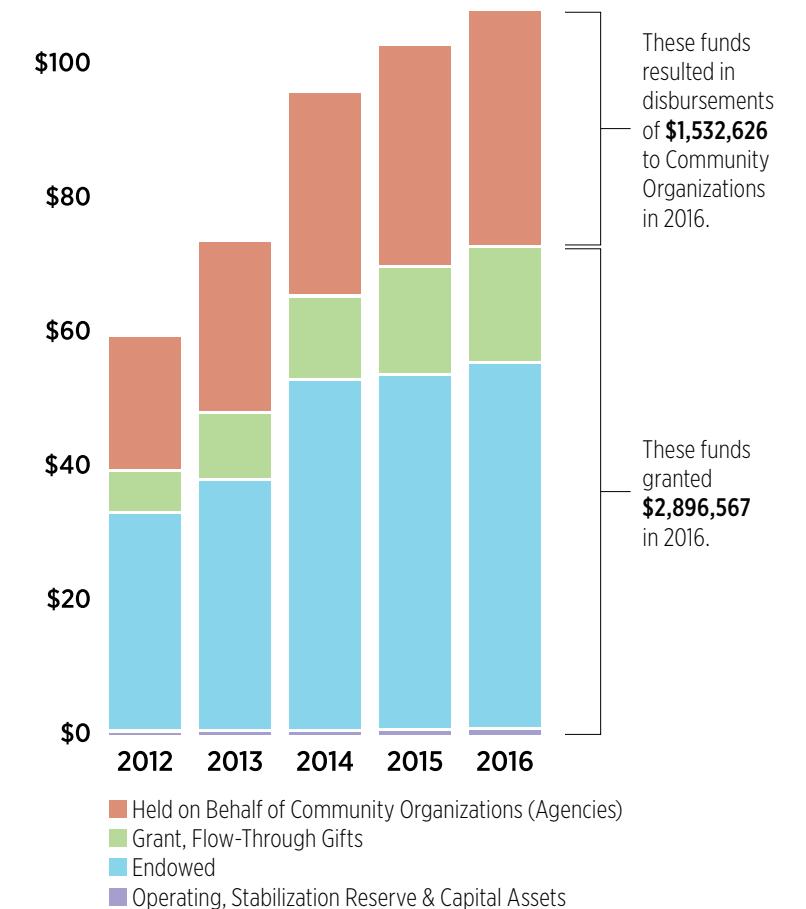
### Fund Stewardship and Prudent Investment

The complete audited financial statements, as of December 31, 2016, are available on our website at [theocf.org/news/publications](http://theocf.org/news/publications)

### Investment Returns



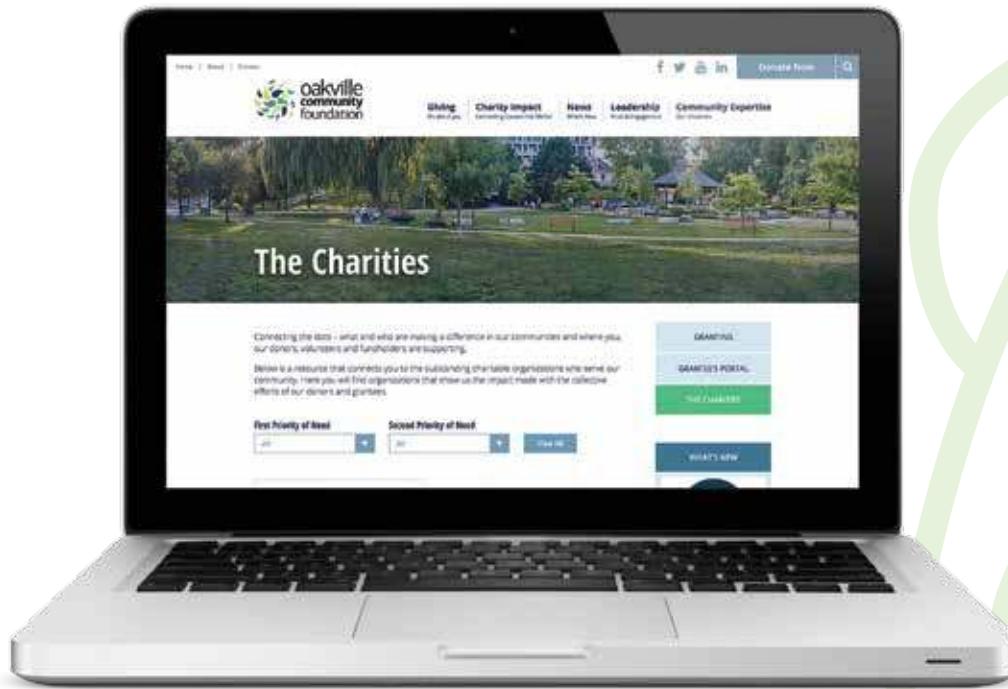
### Fund Balances by Type (millions)





# 2016 | Grantmaking For Our Community

Each year we have the privilege of granting funds to various groups within our community. With a comprehensive view of the challenges facing Oakville, we focus our granting where we believe, we and our Fundholders, have the greatest impact.



Following the 2016 Fundholder Survey, The Foundation gained one key learning on how to better showcase the work of the Charities Fundholders wanted to support. The new website allows for searching charities by name as well as priority area, and provides a direct link to the charities own website and contact information. Visit [theocf.org/impact/charities](http://theocf.org/impact/charities)

**\$2,896,567**

Record Breaking Grantmaking: grants from all funds to local, provincial and national charities

8 collaborative community grants:

**\$156,231\***

44 single community grants:

**\$283,706\***

\*Our Fundholders provided an additional \$209,050 towards our Community Granting Program and their support is reflected herein.

We created **5,000+ HOURS OF FUNDING** to support administrative resources

2016 was the Oakville Community Foundation's highest granting year in history, with

**433 GRANTS PROVIDED.**

## FOUR | Community Impact STRATEGIC GOAL | ON OUR WAY

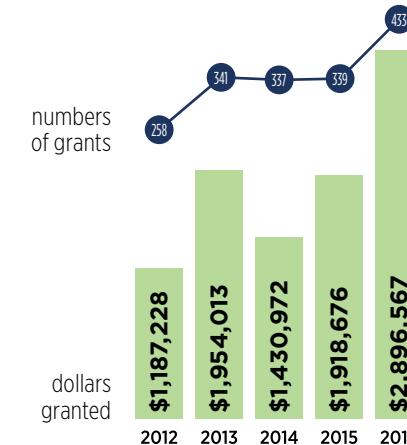
### Goals

- More than double local granting and initiatives by 2018
- Increase the share of our dollars that stay locally
- More than double the potential funding offered to charities while making access easier

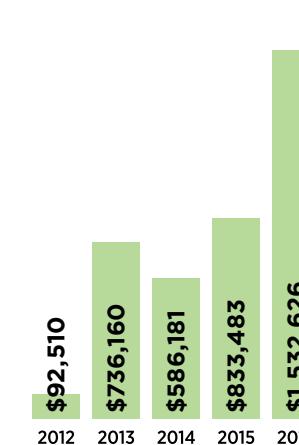
### Revamped granting model

We revamped our granting model in January 2016, moving from two granting cycles to one and encouraging collaborative initiatives.

### Number of Grants & Granting Totals

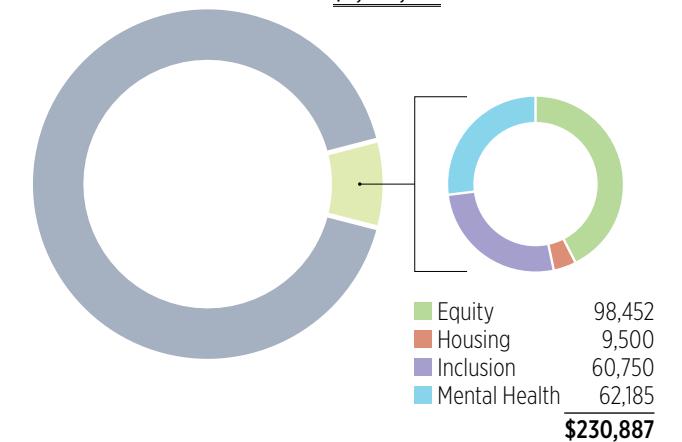


### Agency Fund Disbursements

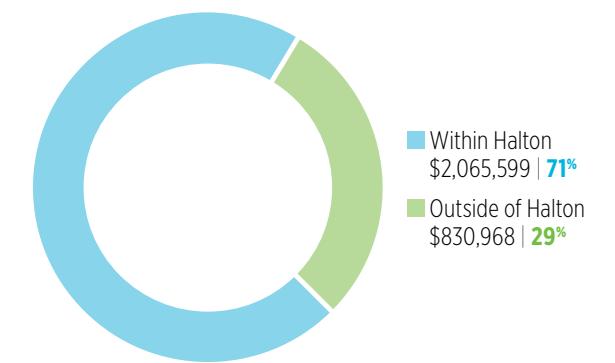


### Granting Totals

Fundholders	2,665,680
Community Granting Program	230,887
<b>Total</b>	<b>\$2,896,567</b>



### Geographic Focus



Foundation Leadership

# 2016 | Board, Staff & Committees



## Board of Directors 2016 – 2017

(Front Row Left to Right) Jeff Black, Joanne Peters, Gerry Popp (Chair), Mary Lui, Nick Jelinek (Past-Chair) (Back Row Left to Right) Charles Havill, Frank Lochan, Tim Zahavich, Michael Whitcombe, Vik Sachdev, Brian Hanna, Ren Henderson (missing, Mags Shorey)



## Foundation Staff

(Left to right) Alison Moeller, Judy Bonifacio, Carolyn McDougall, Wendy Rinella, Aldis van Warmerdam, Sarah McPherson, Frances Pace, Lori Armitage (missing, Yasmin Kalaji)

### INVESTMENT

Jeff Black (Chair) | Kriss Bush | Craig Hayman (Oakville Hospital Foundation Representative) | Terry Jackson | Frank Lochan | John Lydall | Mike Miller | John Mitchell

### AUDIT

John Mitchell (Chair) | Ian Cockwell | Jim Collins | Sam Greiss | Ren Henderson | Betty Ann Jarrett (Oakville Hospital Foundation Representative)

### FINANCE

Ren Henderson (Chair) | Frank Canis | Charles Havill | Frank Lochan | Vik Sachdev | Kevin Tremblay

### COMMUNITY LEGACY BUILDING

Mags Shorey (Chair) | Bindu Cudjoe | Doug Ferguson | Bruce Galloway | Brian Hanna | Ren Henderson | Mary Lui | Andy Martin | Joanne Peters | Jim Rager

### GOVERNANCE

Tim Zahavich (Chair) | Brian Hanna | Gerry Popp | Mags Shorey | Michael Whitcombe

## Their legacy: Creating a place we can all belong | In memoriam

We recognize and honour the following Fundholders, friends and volunteers of The Foundation, who have passed away. Their legacies live on in the future we're building for our community: a place where all of Oakville residents can feel that they belong.

*Janet Alton*

*Ann Marie Anderson*

*Art Birchenough*

*Dennis Blake*

*Joan Deyell*

*Doris Hyde*

*Victor William Jones*

*Josephine Kleimeyer*

*Sam Piercey*

*David Schooling*

*Roger Shorey*

## Community Fund for Canada's 150th



**CANADA 150**

In 2016, we announced a funding opportunity for local projects that commemorate Oakville's history, and which embrace the diverse cultural heritage of our community. This funding is part of the Community Fund for Canada's 150th; a national program developed by Community Foundations Canada in partnership with the federal government.

## 2016 Creating Vital Solutions Sponsors



## Vital Community Sponsors



## Fundholder Survey & Focus Group Sponsors



## Event Sponsor



### ABOUT THE OAKVILLE COMMUNITY FOUNDATION

#### We connect people who care to causes that matter

Since our founding, the Oakville Community Foundation has provided over \$21 million in charity grants and has accumulated \$108 million in assets, growing our pool of resources to support the community.

Our accomplishments include:

- Establishing over 175 family and organization funds
- Building Oakville's Heritage Trails, in partnership with the Town of Oakville
- Designating endowment funds to support youth, the environment, heritage and others

#### Building more effective philanthropy

We connect people, families and companies with causes that inspire them. We pool resources, knowledge and expertise, working with others for even greater impact. And we help donors realize their philanthropic goals by matching their interests with community needs and finding innovative ways to make every donation count.



COMMUNITY FOUNDATIONS OF CANADA  
FONDATIONS COMMUNAUTAIRES DU CANADA  
all for community. ensemble pour tous.

The Oakville Community Foundation is a proud member of our National Organization, Community Foundations of Canada.



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