



2017 IMPACT REPORT
BUILDING ON BELONGING

BUILDING ON BELONGING

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

OUR MISSION | Invest the generosity of caring residents to build opportunity for generations.



In 2017, The Foundation joined other communities across Canada to recognize our sesquicentennial and at the same time be respectful of the Canadian legacy to our local Indigenous population. For a community organization focused on community-building, inclusion and creating a sense of belonging, it was an important balancing role.

While we distributed grants from the Community Fund for Canada 150th we also hosted many Vital Conversations on aspects of Truth and Reconciliation. We were joined by every sector across our community to support these important activities and through this process emerged the Oakville Partnership on Truth and Reconciliation.

Creating a sense of belonging for everyone including our Indigenous neighbours in Oakville is in the vision of our current strategic plan, Building More Effective Philanthropy. 2017 marked the plan's second year and with it our bold effort to gauge the sense of belonging in our community. With the support of the Town and YMCA of Oakville, our community wide survey gave us a greater understanding of belonging in Oakville neighborhoods. With this research we have developed new programs: **Community Classroom** and **Belong Oakville** to strengthen and support belonging across our Town.

2017 was also a turning point for our research partnership with Sheridan College and their project "Community Ideas Factory" - the goal of the work is to create fundable solutions based on our 2015 Vital Signs Report. By engaging many service organizations and their clients, the Community Ideas Factory research has now identified fundable solutions to the Vital Signs challenges of affordable housing and food security.

In November these fundable solutions were shared with our Fundholders who stewarded The Foundation in the selection of the top solutions to fund. **BeCause Oakville** launched in 2018 and proposals have been requested from charities for these priority fundable solutions. Community Ideas Factory research will yield more fundable solutions in 2018 and beyond.

Photo courtesy of: Ro'ly Astrom



In 2018, we will start to develop our new strategic plan and we will be reaching out to Fundholders, community partners, knowledge keepers and local leaders to help us shape our next stage of directions and plans.

At The Oakville Community Foundation, we open a safe space where people can share their experiences, desires and passions, which we translate into a positive and effective philanthropic force in our community. Thank you to everyone who joined our movement in 2017. And if you're new to working with us, we warmly welcome you to this space we are creating for Oakville's future builders.

Michael Whitcombe, Board Chair
Wendy Rinella, CEO

REPORTING BACK

Photo courtesy of Luyi Wang



STRATEGIC PLAN: YEAR TWO

The year 2017 represents a mid-point in our three-year (2016-2018) strategic plan, *Building More Effective Philanthropy*, which was built around four strategic areas:

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

While we delivered on this plan, we continued to expand our community impact and adjust our approach.

RESEARCH: UNDERSTANDING OAKVILLE'S NEEDS AND SOLUTIONS

Building on our benchmark 2015 Vital Signs Report, we've taken our understanding of Oakville's areas of greatest need (equity, affordable housing, mental health, diversity and inclusion) to the next step of researching community-based solutions and to funding those solutions.

In 2017, we started to report back on our collaborative research project with Sheridan College, the Community Ideas Factory, which has a goal of identifying fundable solutions that can be implemented in our community.

Working with leading agencies in these areas, along with Sheridan College researchers, we investigated solutions that address:

- Affordable housing
- Food security
- Equity (employment)

GRANTING BASED ON RESEARCH: REALIGNING OUR PRIORITIES



Be Long
Oakville



Be Cause
Oakville



Community
Classroom

Our research findings informed **BeCause Oakville**, our new grant program that launched in January 2018 and invited Proposals from charities to specifically direct how they would address one of our three funding priority areas:

- Expanding Oakville's capacity to providing emergency shelters
- Investing in affordable housing alternatives
- Creating a one stop, integrated intake system for individuals requiring use of food bank services

To understand what it takes to create a sense of belonging and inclusion in our community, we launched our **Sense of Belonging Survey**, conducted with the YMCA of Oakville and the Town of Oakville. We gathered an understanding of how our neighbours perceive their personal belonging and also what activities will strengthen belonging in Oakville.

TWO NEW FOUNDATION PROGRAMS BASED ON SENSE OF BELONGING RESEARCH:

The information we learned from our research about how place, community connection, social connection, feeling safe, as well as pride and identity laid a clear path forward to new programs and offerings. To build a greater sense of community and foster our sense of belonging, we launched two Foundation-led programs:

- **Belong Oakville:** our new community open doors day, which helps to welcome families into cultural and recreational facilities and activities
- **Community Classroom:** our new curriculum-based, arts, culture and heritage program, which creates a formal link between local schools and cultural organizations

BELONGING MATTERS...



That's why Oakville Community Foundation wants to understand how people across Oakville experience belonging. Have you worked in, lived in, or visited Oakville? We want to hear about your experience in our community. Please take our survey to help make Oakville a more welcoming community, where everyone can belong.

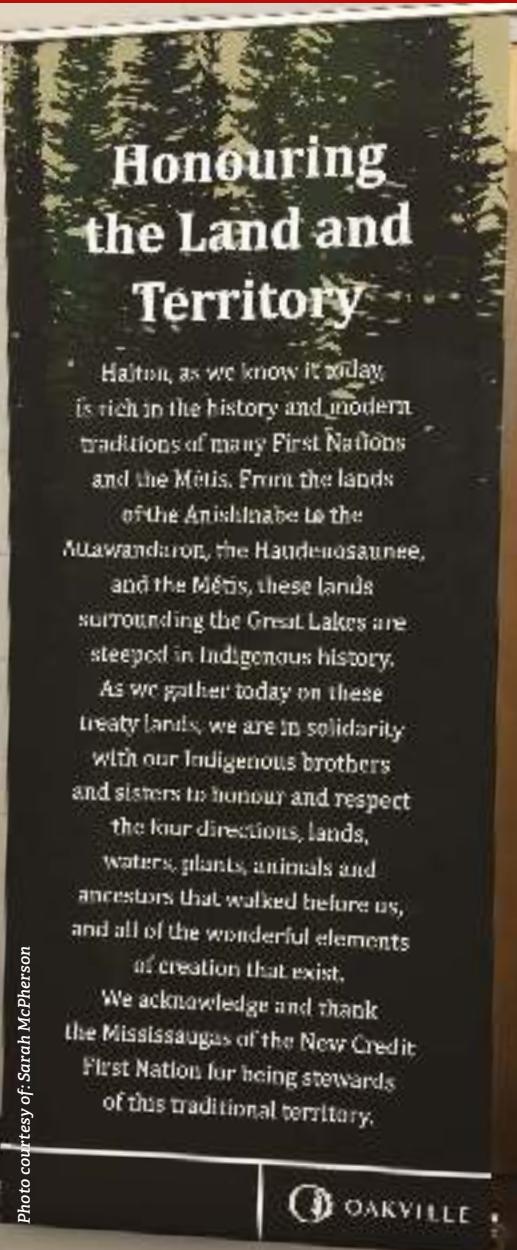
In partnership with



YMCA of
Oakville

Thanks to our Community Outreach Partners:
United Way of Oakville, Oakville Public Library,
and Oakville Chamber of Commerce.

EMERGING ISSUES: COORDINATING OUR COMMUNITY'S RESPONSE



Our ability to coordinate our community's response to emerging issues is a relatively new role for The Foundation: another role that takes us beyond simply being a "granting agency".

Last year, The Foundation began the investigation of what **Truth and Reconciliation** looks like in Oakville, starting with asking local Indigenous community members what it looks like to them. Our early activities have included:

- Recognition of Oakville as "treaty lands" through development of educational banners and incorporating smudging ceremonies at events
- Becoming a signatory to The Circle on Philanthropy and Aboriginal Peoples Declaration of Action to implement the Calls to Action of the Truth and Reconciliation Report. Hosting Vital Conversations on Treaties, Missing & Murdered Indigenous Women and Girls and Susan Aglukark's Inuit Perspective
- Building moccasin trails with the Town and including a guided walk of the trail with an Indigenous knowledge keeper for all Grade 5 students as part of Community Classroom

In 2017, through the **Community Fund for Canada's 150th**, funding was provided for local projects that commemorate Oakville's history, and which embrace the diverse cultural heritage of our community. This funding is part of a national program developed by Community Foundations of Canada in partnership with the federal government.

LOCAL PHILANTHROPY: A RESOURCE FOR OUR FULL COMMUNITY



As part of our plans for growth and for implementing the right systems to support individual, family, business and charity giving, in 2017 we increased our granting and increased our support of local needs (for more details, see the Granting section on the following pages).

Launched in 2016, we continued our two matching programs, made possible by Estate gifts from our generous donors, Doris Hyde and Victor William Jones.



Entitled the **Canada 150th Legacy Endowed Matching Program**, we provided three distinct matching opportunities to help individuals and charities build and grow a fund with The Foundation.

Our Charity match, allowed agencies to establish a new endowment fund with a minimum of \$10,000 and receive a matching gift of \$10,000.

In 2017, eleven local charities took part in the program: ArtHouse, ErinoakKids Center for Treatment and Development, Home Suite Hope, Lighthouse for Grieving Children, Smilezone Foundation, Wellspring Birmingham Gilgan House, Bronte Creek Historical Society, St. Simon's Anglican Church, The Arctic Rose Foundation, Oakville Children's Choir and Every Child Now Foundation

Similarly, **The Canada 150 Legacy Matching program** allowed Fundholders to establish and or grow the size of their funds with a contribution match of up to \$5,000: encouraging over \$300,000 in new contributions.

In 2017, we began the shift to a new **Customer Relationship Management** system, starting with research and assessment of the best options. Our new system, which launched in early 2018 includes a portal that offers a comfortable "online banking" experience for all of our Fundholders.

LOCAL PHOTOGRAPHY CONTEST

For this annual report we conducted a contest to help us connect with, share and recognize the work of local photographers. We put out a call for photos that communicate the spirit of Oakville and the theme of this annual report: Building on Belonging. Winning entries include the cover photo by Tina Reid and additional images used in these pages. Jia Chen, Luyi Wang image, Madi Perry and Paul Yeghouchian.

GRANTMAKING FOR OUR COMMUNITY

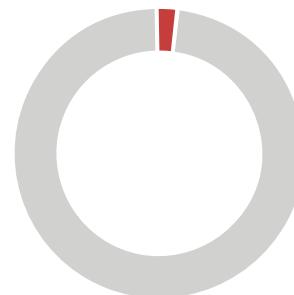


Photo Courtesy of Madi Perry

Each year, we have the privilege of granting funds to various groups within our community. In consultation with our Fundholders and with an understanding based on research, we focus our granting where we believe we have the greatest impact.

GRANTING TOTALS

■ Total Strategic Grants*	\$ 302,208
■ Total Fundholder Grants**	\$15,771,134
Total Grants	\$16,073,342

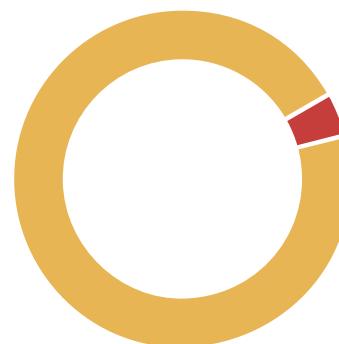


*Includes Fundholder additional support of **\$138,235** towards our Community Granting Program.

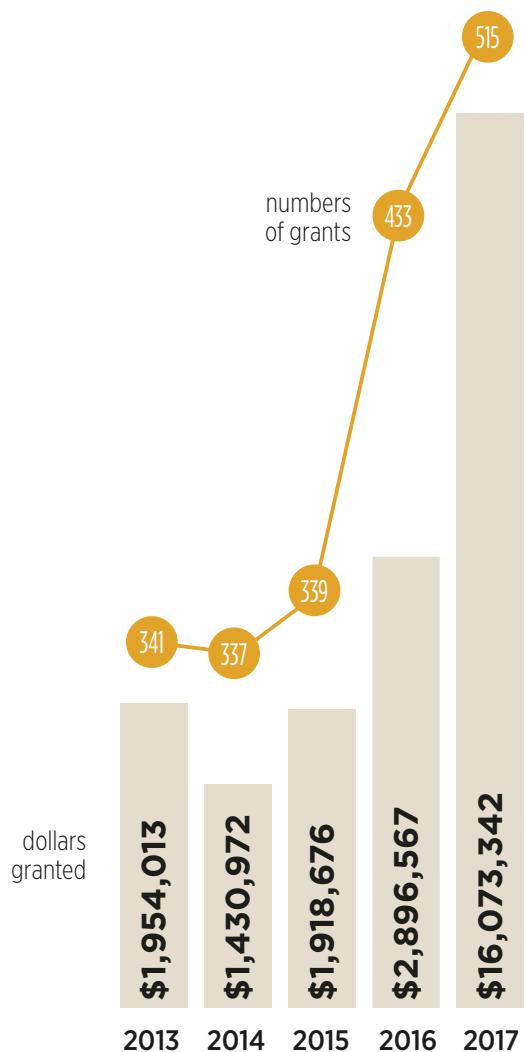
The Oakville Community Foundation issued the single largest grant in our history: over **\$10 million in Flow-Through funds.

GEOGRAPHIC FOCUS SCHEMATIC

■ Halton	\$15,397,515 96%
■ Non-Halton	\$675,827 4%

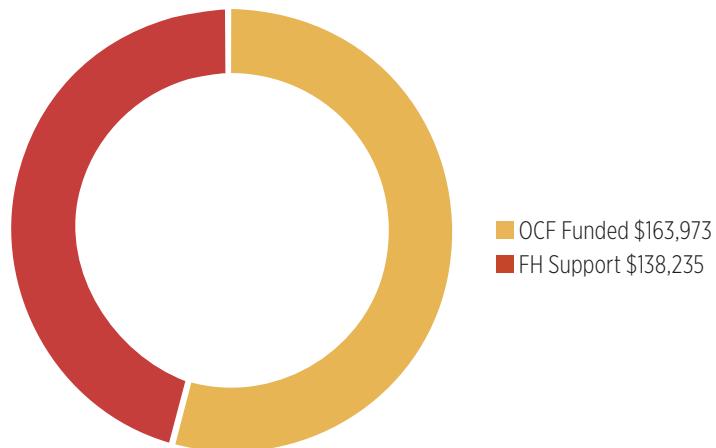


NUMBER OF GRANTS & TOTAL GRANTING

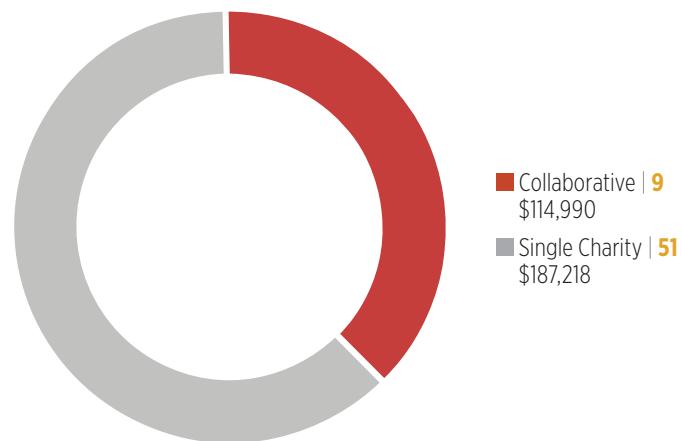


STRATEGIC GRANTS

OCF FUNDED VS. FH SUPPORT



STRATEGIC GRANTS - COLLABORATIVE VS. SINGLE CHARITY



DONOR STORY

INVOLVING THE FAMILY'S NEXT TWO GENERATIONS IN PHILANTHROPY



Photo courtesy of Terry Jackson

Having dedicated decades to philanthropy, volunteerism and community involvement, Bonnie and Terry Jackson have straightforward advice for anyone who wants to get started with doing the same: set up a fund at your local community foundation.

Back in 2001, the Jacksons were considering setting up a family foundation. But their financial planner suggested setting up a fund with The Oakville Community Foundation instead which offered a simpler process and a closer connection to the needs of the community.

Ever since that time, Bonnie and Terry have been deeply involved in supporting The Foundation as both Fundholders and volunteers. And this year, Bonnie and Terry have come up with a unique way to involve the next two generations of their family in the philanthropic world.

“We’ve long had The Oakville Community Foundation in our will,” explains Terry.

“But last year, as we were reviewing our estate and our assets, we realized that we still had a good amount of money available to designate to charity – and an

opportunity to include our children and grandchildren in the process. Rather than set up one large new family fund, we set up 11 new funds for each of our three daughters and eight grandchildren.”

“We started with a small amount of money in each of our daughter’s and grandchildren’s names. It made sense to get all of the funds established now, rather than at the time of our deaths – which could be complicated,” says Bonnie.

“And through a matching program at The Foundation, each \$1,500 fund received a \$1,000 match; starting each new fund at \$2,500.”

Bonnie and Terry built flexibility into the new funds in a few ways. They included the option for each Fundholder to “spend down” ten percent of the capital each year, should there be an opportunity that they want to support financially. And the individual funds

can be combined; allowing the children and grandchildren to support large initiatives or to streamline and help each other with the management of the funds.

Bonnie, who now serves on The Foundation’s board of directors, explains that Fundholders are the first to be alerted to local needs and are given the chance to support those needs. She shares the example of an innovative

program called Homeward Bound: “As an organization, we decided that instead of giving fish, it was time to teach people how to fish. Through this program, which started in Toronto, single moms are provided with child care, accommodations, schooling and support in getting a new job. We are in our third cohort with the first cohort now graduating, and it has been very successful.”

Because both Bonnie and Terry have supported many charitable organizations – including the Juvenile Diabetes Research Foundation, YMCA, Kerr Street Mission, ERINOAK KIDS and The Oakville Hospital Foundation – in volunteer and leadership roles, they are very savvy about the philanthropic world. Terry, who also spent two years as the Chair of Community Foundations of Canada, highlights two important aspects of giving through community foundations: “First, if you are philanthropic and want to get started, community foundations make everything easier for you. They simplify by managing and distributing the money on your behalf. Second, even if you aren’t savvy about the local areas of need, your community foundation is. And they can pool funds to make a bigger impact when supporting those needs.”

Their children and grandchildren aren’t the only family members that the Jacksons have brought into the community foundation fold. When Bonnie’s sister April lost her husband a few years ago, she needed help dealing with the tax implications related to an increase in her assets. Bonnie and Terry introduced April to the team at The Foundation who helped April direct some of her capital gains into a scholarship for young Indigenous women, supporting work she is passionate about and reducing her tax bill along the way.

“Everyone has a different reason for starting a fund,” says Terry. “But here’s what makes doing so a good idea: it’s a way to be intelligent about your finances while promoting goodwill and goodness.”



ARCTIC ROSE FOUNDATION STORY

A MATCH IS MADE IN SUPPORT OF BUILDING LONG-LASTING RESILIENCY FOR INDIGENOUS YOUTH



Photo courtesy of Susan Aglukark



Photo courtesy of Susan Aglukark

During a career that has spanned more than 25 years, Susan Aglukark's journey as a singer-songwriter has led her to reflect on who she is, where she came from and the importance of discovery – discovery of history, culture and self.

Throughout this time, Susan kept coming back to one area of profound knowledge; the Inuit are an extraordinary people deeply grounded in a culture forged by their Ancestors, their journey is what shaped them.

Through her music, Susan has shared her experiences growing up in Nunavut, as well as the challenges faced by northern communities and Indigenous youth.

She has been actively involved in various projects to bring food and support to northern communities. In December 2014, Susan launched the Arctic Rose Project and raised money to purchase hundreds of kilos of non-perishable food for food banks in the north. She has also channeled her energy into helping Indigenous youth dealing with crisis and identity issues by providing art and journaling workshops.

In 2016, the Arctic Rose Foundation gained charitable status with a focus on helping youth in the north through art and other engaging creative projects.



“The purpose of the Arctic Rose Foundation (ARF) is to nurture Northern Children and Youth in their efforts to engage all aspects of their lives,” says Susan.

“The Arctic Rose Foundation will do this by creating culturally, emotionally, spiritually and physically safe environments for Northern Children and Youth.”

When a need is identified, and a program does not exist, the ARF will develop one with the assistance and participation of respective communities and local northern children and youth.

The Creative Cultural Reflection (CCR) program is an arts-driven program designed to provide participating youth a much-needed creative outlet. Launched this year in Rankin Inlet, youth participants are guided to explore, discover and connect with their ancestral and cultural background, in order to learn about the rich history of their communities, their families and themselves.

For Susan, art played a significant role in her personal healing journey and she believes it plays an important role for Indigenous youth who are dealing with contemporary identity issues today.

“I have seen first-hand the positive outcomes that occur when young people are able to use art, in any form, to connect with their ancestral culture and identity. Through self-discovery they are able to uncover a

proud and rich history and reconnect to who they are as an Indigenous person.”

In addition to receiving charitable status, the ARF established a fund with The Oakville Community Foundation (The Foundation) through a unique matching campaign - the Canada 150 Legacy Campaign. The Matching Campaign was made possible through a generous Estate gift from the late Doris Hyde. As the gift was unrestricted, The Foundation chose to use these funds to help other charities establish and build a Fund that will support their future needs. Charities established a new Endowed Fund with \$10,000 and received an equal amount from The Foundation.

“Oakville has been a second home for more than 20 years. It is a community where Jacques and I raised our son, and where I have many close friends and fond memories. Starting a fund with The OCF is a way we can say thank you and contribute on a local level.”

INVESTMENT & FUND BALANCE OVERSIGHT

Photo courtesy of Jia Chen

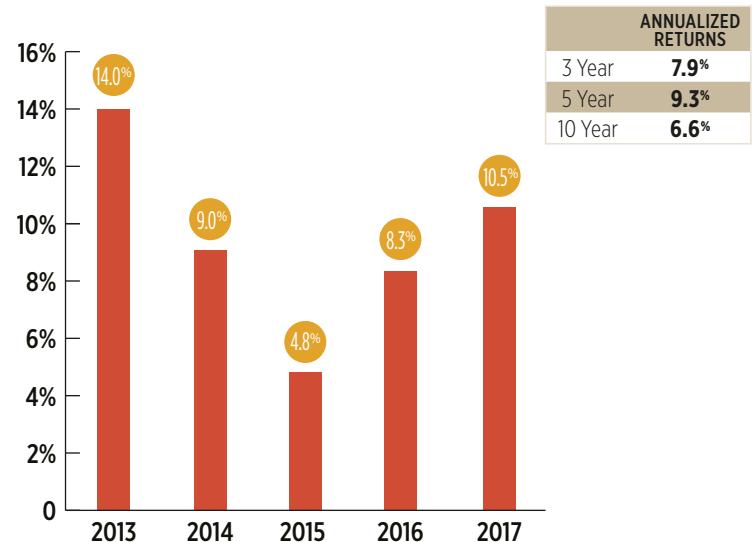
The Foundation provides careful stewardship of the monies given over to our care. These charts and graphs are a way of providing a clear and concise snapshot of our fund positions for the past year, as well as demonstrating our historical data.

WE ARE EFFICIENT

Administration as % of Assets

Investment Management	0.8%
Administrative costs	0.2%
	<u>1.0%</u>

INVESTMENT RETURNS



FUND BALANCES BY TYPE

(MILLIONS)

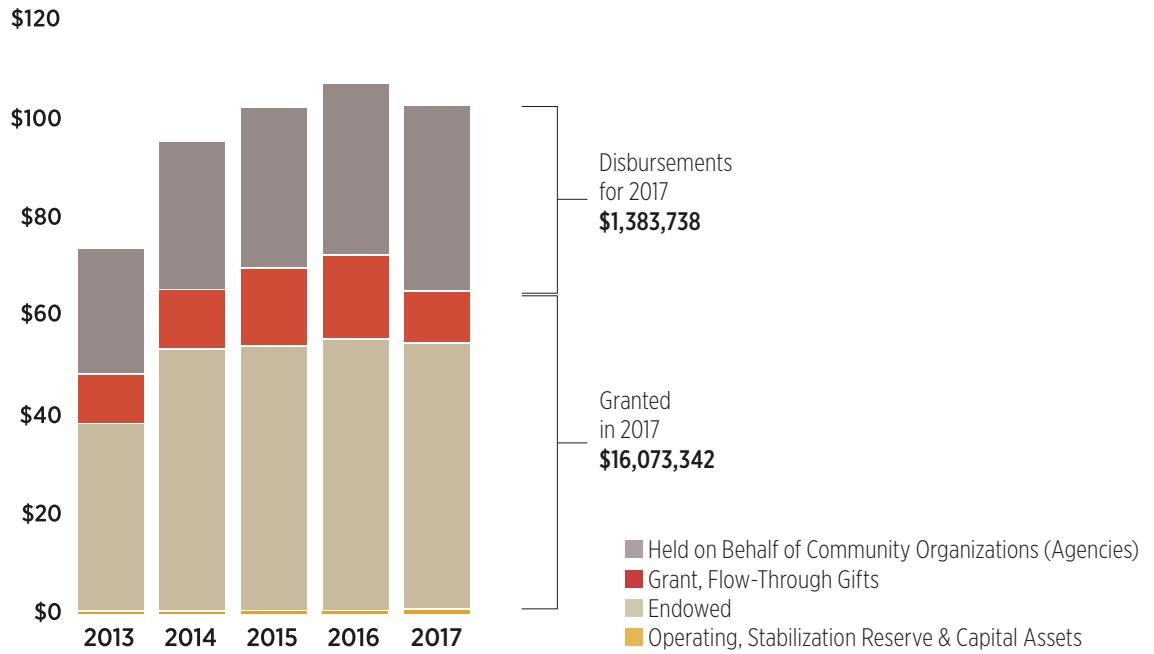


Photo courtesy of Paul Yeghouchian

ABDUL CHAUDHRY STORY FOR THE OAKVILLE COMMUNITY FOUNDATION



Photo courtesy of Rolly Astrom

Abdul Chaudhry

Former social worker, current philanthropist, lifelong changemaker

Over his long tenure of involvement, Abdul Chaudhry has been impressed to witness The Oakville Community Foundation's transformation from a funding agency to an active partner in the community.

Abdul has two masters degrees, 27 years of experience as a social worker and a passion for addressing the problems faced by local communities. Having begun his training as a social worker in his native country of Pakistan where he obtained his first graduate degree, Abdul went on to earn a second master's degree in the United States before eventually immigrating to Canada with his wife in 1970.

After arriving, Abdul first worked for the Catholic Children's Aid Society in Toronto for five years, then moved to a similar role in Hamilton for the next 22 years. Abdul and his wife (who he unfortunately lost in 1989 to a massive heart attack) had two daughters and a son; today, they are grown, and he has nine grandchildren.

INTRODUCTION TO LOCAL COMMUNITY DEVELOPMENT COUNCIL AND COMMUNITY FOUNDATION

After retirement, Abdul became involved with the local community development council – now called Community Development Halton – where he has served on the Board of Directors for 15 years.

“The first conversation I had with the community development council's Executive Director sparked my interest in getting involved. Similarly, my first conversation with The Oakville

Community Foundation's Executive Director about ten years ago kicked off my involvement with that organization," explains Abdul. "I was put on the Grants Committee as a volunteer right away and was thrilled by the opportunity to meet fellow members from various walks of life, as well as agencies applying for funding. I don't think I ever visited an agency that I was not impressed by."

Abdul is also involved in three major Muslim organizations: the Islamic Society of North America (ISNA) Canada, the International Development and Relief Foundation (IDRF) Canada and the Islamic Circle of North America (ICNA) Relief. Last year, working with the ICNA, Abdul financed the building of a school in Pakistan in honour of his late parents.

ESTABLISHMENT OF FAMILY FUND

In 2012, Abdul set up his Fund at The Foundation: the Chaudhry Family Fund. He started with a contribution of \$2,500, to which he added each year. In 2016, Abdul participated in The Foundation's Canada 150 Legacy Fund, through which his contribution of \$5,000 was matched; he was able to quickly grow his family fund, which now holds more than \$20,000. With a fund of this size, he can personally direct the returns to support local organizations and initiatives in need of funding.

"As a single widower living on my own and with financially independent children, I have the resources to offer support to Oakville, where my son and his family live; I have four grandchildren here," says Abdul. "I am investing in their community and my son will continue the Chaudhry Family Fund when I am gone."

Abdul is grateful for the information and research results that The Oakville Community Foundation brings to Fundholders so that they can make informed philanthropic decisions. He points to the organization's Vital Signs Report, and the issues highlighted in the Report, such as mental health, diversity and inclusion.

"The Oakville Community Foundation educates residents and works with agencies to meet critical local needs," says Abdul.

Pointing to an example he sees as particularly innovative, funding from The Foundation has helped a local agency, ArtHouse, to launch a project that supports positive mental health and social inclusion for children and youth.

"The Foundation is dynamic and progressive; changing with the changing times and meeting the needs of this increasingly diverse community."

BOARD, STAFF & COMMITTEES



Board

Front row (right to left) Joanne Peters (Vice-Chair), Mary Lui, Mike Whitcombe (Chair), Bonnie Jackson, Mags Shorey (Community Legacy Committee Chair), Gerry Popp (Past Chair, Audit Committee Chair)

Back row (right to left) Vik Sachdev, Bindu Cudjoe (Secretary), Mike Miller (Investment Committee Chair), Ren Henderson (Treasurer, Finance & Risk Committee Chair), Chuck Havill, Tim Zahavich (Governance Committee Chair) Missing - Brian Hanna, Frank Lochan

Staff

Wendy Rinella | Chief Executive Officer, Sarah McPherson | Director of Philanthropy and Communications, Frances Pace | Director of Fundholder and Community Programs, Chanel Anderson | Board Liaison and Event Manager, Danielle Gayton Development & Communications Associate, Michelle Collins | Digital & Office Solutions Analyst, Alison Moeller | Director of Finance & Investment, Aldis van Warmerdam | Director of Finance & Investment, Lori Armitage | Accountant

Committees

AUDIT

Gerry Popp * | Jim Collins | Sam Greiss | Ren Henderson | Betty Ann Jarrett

COMMUNITY LEGACY BUILDING

Mags Shorey * | Bindu Cudjoe | Doug Ferguson | Bonnie Jackson | Nick Jelinek | Brian Hanna
Mary Lui | Andy Martin | John Platt

FINANCE & RISK

Ren Henderson * | Chuck Havill | Frank Lochan | Mike Miller | Vik Sachdev | Kevin Tremblay

GOVERNANCE

Tim Zahavich * | Bindu Cudjoe | Brian Hanna | Joanne Peters | Mags Shorey

INVESTMENT

Mike Miller * | Jeff Black | Kriss Bush | Paul Fahey | Sam Greiss | Craig Hayman
Terry Jackson | Natalie Jameson | John Lydall

* indicates chair



Our 20 years and older Fundholders

The Donald and Marilyn Noble Family Fund	The Oakville Beaver Literary Fund
The United Way Endowed Funds	The Rotary Club of Oakville Trafalgar Fund
The Larry & Gerry Wilson Fund	The Lil Jennings Fund
The Mulvale Family Fund	The Gillian Smart Family Fund
The Lawson Foundation Fund	The Peter & Dorine Bloemen Fund
The William & Joan Deyell Fund	The Alan & Nancy Richmond Fund
The Alexander and Bernice De Maio Foundation Fund	The Norman & Nerina Murray Family Fund
The Munz & Planche Family Fund for the Performing Arts	The Budd Family Fund

IN MEMORIAM: A LEGACY THAT EXTENDS

We recognize and honour the following Fundholders, friends and volunteers of The Foundation, who have passed away. Their leadership and investment in Oakville created a base from which we can extend to meet and address our community's changing needs

Mr. B. William Masson
Mr. Douglas Brown

JOHN MITCHELL – THE ADRIAN COOTE VOLUNTEER OF THE YEAR AWARD RECIPIENT



The Adrian J. Coote Award was established to recognize and thank a Foundation volunteer who has given extraordinary service to The Foundation over an extended period of time. It is The Foundation's highest award and is not necessarily given out every year.

Our Partners



ABOUT THE OAKVILLE COMMUNITY FOUNDATION

We connect people who care to causes that matter

Since our founding, The Oakville Community Foundation has provided over \$37 million in charity grants and has accumulated \$103 million in assets, growing our pool of resources to support the community.

Our accomplishments include:

- Establishing over 200 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.

*Special thanks to contributing writers
Jane Hamilton and Marlene Oliveira*

Download our Financial Statement at
theocf.org/leadership/publications



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