



Community Resiliency Through Philanthropy in Oakville



2020 Annual Report

A look back at 2020

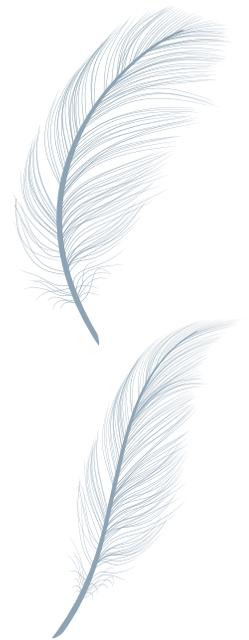
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Land Acknowledgement

We acknowledge that Oakville lies on the traditional territories of the Wendat, Haudenosaunee, and Anishnaabeg. We recognize that these lands include Treaties 14 and 22 with the Mississaugas of the Credit First Nation. February 2020 marked the 200th Anniversary of Treaty 22.

We also acknowledge the many First Nations, Metis, and Inuit people who now call our Town home. We are grateful for the guidance of the Mississaugas of the Credit First Nation and the many Indigenous knowledge keepers and community leaders who have shared their knowledge on this reconciliation journey.



Our Indigenous Cultural Advisor: **Elder Peter Schuler**

As we continue on our Reconciliation journey, The Foundation has engaged Elder Peter Schuler to assist us moving forward to undertake a number of initiatives to educate Oakville residents and ourselves on Indigenous culture and history.

Elder Peter Schuler is a grandfather and Elder of the Mississaugas of the Credit and a member of the Minweyweygaan Midewin Lodge in Manitoba. An amateur writer and artist, Peter tries to pass on traditional Ojibwe teachings through storytelling, art and craft making. Since retirement from construction work he has taken these stories to elementary and high schools and works to educate the public in an effort to fight racism and to promote understanding of First Nations history and culture. He also currently co-teaches a course entitled First Nations and the Environment with Professor Dan McCarthy at the University of Waterloo.



Building a Resilient Community Through Philanthropy

A Message from Our Board Chair and CEO



We started 2020 with ambitious plans to build Oakville's social economy and leverage the Investment Readiness Program (IRP) for local social purpose organizations. We also planned to launch a campaign at our May 2020 Annual General Meeting to expand and rebuild the Heritage Trails on their 20th Anniversary with an exciting drone video, shot in the summer of 2019. Little did we know that we would be launching the Heritage Trails 20th Anniversary video in April as a way to keep people connected and improve their spirits as we were all physically distancing.

The Pandemic changed the way we worked, shopped, attended school, connected with friends and our extended family and community. As the ground shifted, we adapted, adjusted, and looked for productive ways we could continue to maximize our local impact. The Pandemic exacerbated many of the inequities in our community. It exposed the fissures in our long-term care system and challenged our own narratives about our country, our community and ourselves.

The senseless murder of George Floyd, violence towards Indigenous Canadians and People of Colour, and subsequent protests prompted us to take the time to listen and learn from our neighbours and local organizations. We reflected on our role in institutional racism and how we can use our philanthropic mandate to address economic and racial injustices.

To move forward, we adopted the Sustainable Development Goals (SDGs) and aligned our business plan with SDG #10, Reduced Inequalities, and the plan to “leave no one behind.” As part of our continued journey on Truth & Reconciliation, we have entered into a permanent relationship with Elder Peter Schuler of the Mississaugas of the Credit First Nation. We are very grateful for his continued guidance.



For The Foundation the transition to working from home was immediate as our 2018 digital transformation enabled us to adapt seamlessly from the office to home. This digital conversion also benefited our Fundholders, donors and the community as our digital infrastructure offered a means to apply, grant, fundraise and donate online.

With existing online systems, we were able to focus our attention on the needs of the local charity sector. In March, we launched the Oakville Resiliency Fund which distributed over \$1 million throughout 2020 (Pg. 7). This Fund enabled a quick distribution of much-needed grants to support front-line charities during the State of Emergency; supported the Charity-Small Business Partnership Program (Pg. 9); and then Matched funds through GIVEOakville (Pg. 9).



**Are you looking to finance
a post secondary education?**

Awardshub.ca



In January, we launched our Community Education Awards Hub, a free online platform (Pg. 37) linking local organizations that provide scholarships and bursaries to students seeking support for their post-secondary education. It was serendipitous that the Awards Hub was available to students online, given that secondary schools closed for the remainder of the school year.

We were excited to award the new Alexander and Bernice DeMaio Education Awards to three Oakville students. The Foundation continued to support elementary teachers, students and their families through online Community Classroom programming while maintaining support for local arts, culture, and environmental organizations (Pg. 32).

Another pre-pandemic decision that aligned serendipitously to support urgent needs was our third Program-related Investment to Windmill Microlending. Windmill provides microloans to foreign-trained professionals, a number of whom are Halton based. The majority are foreign-trained health professionals seeking their Canadian accreditation (Pg. 40).

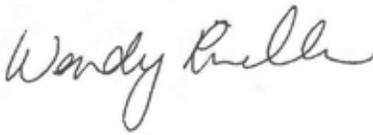
Granting rose over 50%, compared to 2019, for a total of \$5.6 million. The Foundation leveraged its membership with Community Foundations of Canada to bring three national programs to Oakville; the Fund for Gender Equality, The Investment Readiness Program and the Emergency Community Support Fund (Pg. 16 and 17). Although investments were on a rollercoaster through 2020, with an 8.4% YTD drop in March, we closed the year at +8.3%, allowing Fundholder's to easily meet their granting priorities for 2021.

While 2020 was the second year of our Strategic Plan "Building Community Through Philanthropy," it was evident that The Foundation also plays a critical role in building a "resilient" community. Our community continues to face unprecedented challenges, yet we find hope in the outpouring of care from neighbours helping neighbours. We are thankful to our staff team who demonstrated an incredible commitment to our community while working from home. We would also like to thank all of our volunteers, committees and Board members for their unwavering contributions.

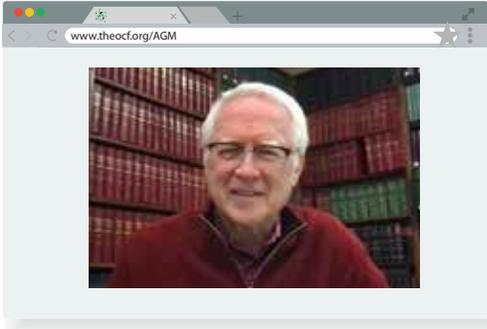
**Thank you for your continued support
of the Oakville Community Foundation.**



Brian Hanna,
Board Chair



Wendy Rinella,
CEO



Oakville Resiliency Efforts: **Supporting Our Community Heroes**

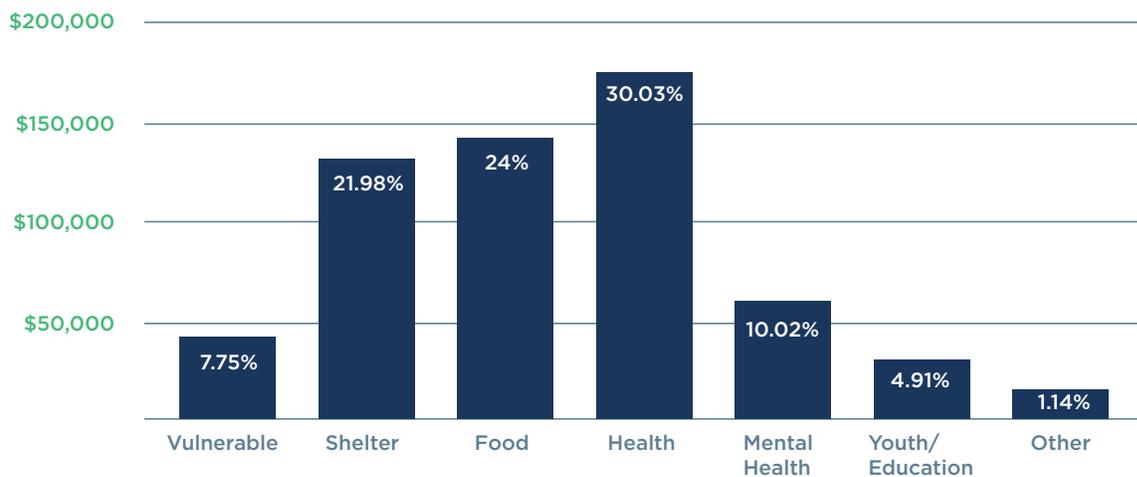


As a community foundation we know the importance of understanding community needs and we ensure that funds are used to support the most pressing issues in our community. With the continued state-of-emergency measures and the continued challenges in the face of the Pandemic, The Foundation turned its attention to resiliency efforts focused on raising more support for the Oakville community to recover.

The Oakville Resiliency Fund

Launched in April of 2020, the Oakville Resiliency Fund was established to immediately help charities during the first lockdown due to COVID-19. The Resiliency Fund was initially rolled out in three phases and focused on funding for Community Heroes, Education Heroes and Food Heroes. These phases included charities on the frontlines working in the health, well-being, education, food and shelter sectors to support vulnerable populations.

Oakville Resiliency Fund Phase One By Sector



The Foundation continued to raise support for these local organizations throughout 2020, with Fundholders and donors contributing nearly \$1 million in support of these local charities. We were fortunate to have support from our Community Partner Rotherglen School, as well as the local community group We Love Oakville and Private Foundations.

Donations supported immediate needs as well as the long-term consequences and impacts of the pandemic, such as mental health, stress and other health factors. Donations from the Oakville Resiliency Fund then supported \$100,000 for 15 Charity-Small Business Partnerships and provided matched dollars of \$250,000 through the GIVEOakville campaign benefitting 54 charities.

With further lockdowns and stay-at-home measures in 2021, we recognize the continued needs and challenges of our charitable sector and its clients. With that in mind, The Foundation will continue to support the community through the Oakville Resiliency Fund throughout 2021 and we invite others to consider donating to this important Fund.

To donate to the Oakville Resiliency Fund, please [click here](#).

“Many Halton families face an agonizing decision each month. They have to choose whether to pay their rent or buy food. It becomes a question of being homeless or hungry. We are pleased to say that we have not turned away any family needing our support even through this difficult time. Together with support from The Foundation, Food4Kids Halton is able to continue to serve our most vulnerable & disadvantaged.”

Food4Kids Halton



Charity-Small Business Partnership Program

The Charity-Small Business Partnership Program (CSBP) was developed to support the long-standing relationships between charities and local small businesses. The CSBP program provided financial support to local charitable organizations that procure their goods or services from Oakville-based small businesses in an effort to rebuild the local economy by keeping funds and jobs in the community.

The Foundation allocated \$100,000 from the Oakville Resiliency Fund for the CSBP program, and corporate donations from Ford Canada, RBC and PearTree Financial. Charities who purchased meals for vulnerable populations they serve were eligible for up to \$5,000. Charities who procured other goods and services in the delivery of their charitable activities were eligible for up to \$10,000.



The CSBP program supported a total of 15 Charity-Small Business Partnerships. This included projects such as ArtHouse for Children and Youth's Generosity Runs Deep in partnership with The Medicine Shoppe and Barkley Design Print & Copy, which provided 60 families with baskets filled with hygienic supplies, as well as The Canadian Caribbean Association of Halton's Caribbean Food Beats the COVID-19 Blues in partnership with Caribbean Vibes Milton which provided 600 free meals along with free online entertainment.



“Throughout our transition to Virtual Programming, Barkley Design Print & Copy has furnished us with arts supplies for our Programs. Thanks to our Medicine Shoppe Pharmacy friends, ArtHouse has provided over 60 Families with Healthy Hampers, that contained vitally needed items. We are grateful for the creativity and generosity of the Oakville Community Foundation and the financial gift that was provided to ArtHouse to support our local business partners during this most critical period. It may be an old cliché, but the “Village” is thriving through collaboration and we are grateful.”

**Don Pangman, Founder & Executive Director,
ArtHouse for Children & Youth**



Partnering with The Foundation to Build Your Own Corporate Social Responsibility Program

We know that employees are looking for more from their employers. Employees want to be part of something meaningful. The best way is to take part in giving back locally, with purpose and impact.

A partnership with The Foundation can provide the same opportunities and achieve the same goals as an internal giving program, but without the drain on staff operating a giving program in-house.

Corporate Social Responsibility (CSR) or Social Purpose, is a way for both small and large companies to enact social change alongside running their business.

Giving with purpose, whether it's financial, or leveraging your employee's skills through voluntarism, it all matters. At the Oakville Community Foundation, we focus on how to help others give with purpose, strategy and impact.

A program built for your company.



If your corporation is interested in building their own CSR or Social Purpose, contact our Director of Philanthropy and Communications at sarah@theocf.org

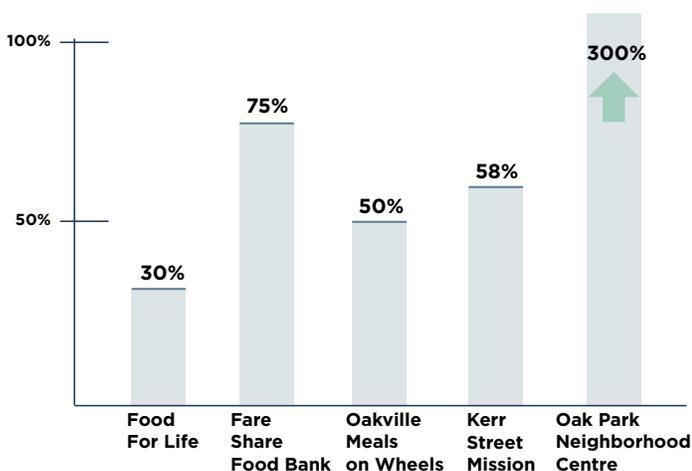
THE OAKVILLE RESILIENCY REPORT

In November, The Foundation launched its latest research report, the Oakville Resiliency Report. The digital report, which is timestamped at the beginning of November 2020, shares the impact of the pandemic and the work that local charities continue to do in the community. The report also included the 2020 GIVEOakville catalogue to encourage readers to rally behind local organizations.

The report explores aspects of food insecurity, physical and mental health, housing and shelter, education and community connections. It also looks at Oakville as a “community of contrasts,” measuring COVID-19 and its relation to low-income individuals and families, racialized communities and its gendered impact.

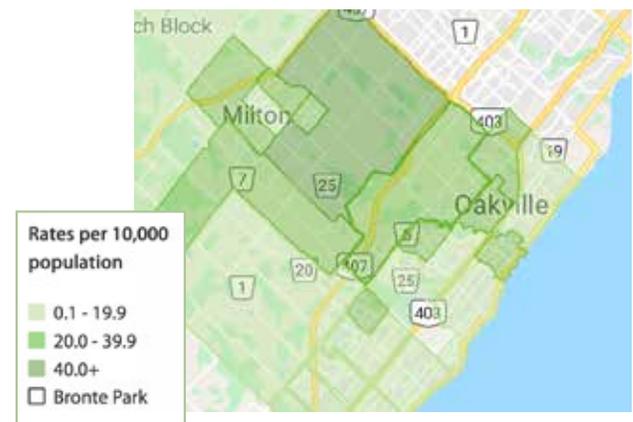
Charity heroes are also heavily featured in the report, effectively showcasing the issues the community has faced and how our local charitable organizations have been there to meet the needs. Charities have been in the trenches since the start of the pandemic, and have adapted and modified services to deliver their programs.

Charity Food Heroes See Increased Demand*



*As reported in November 2020 Report.

Map of COVID-19 cases by neighbourhood in Halton Region September 27, 2020*



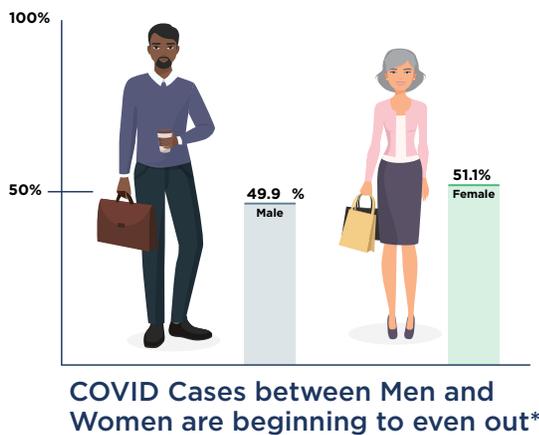
www.halton.ca/For-Residents/New-Coronavirus#02



SAME STORM DIFFERENT BOATS

The Foundation undertook this report to share the role our charities played during the pandemic to keep us resilient and to provide a unique link to the GIVEOakville 2020 charity funding initiative (PAGE). Each page of this report tells the story of numerous local charities and the people that they are able to help, which inspired our Fundholders and the local community to donate through GIVEOakville.

[Click here to see the full report.](#)



Youth 15 -29 (NEET) Not in Education Employment or Training Jumps*

February 2020: 1 in 8 Youth NEET



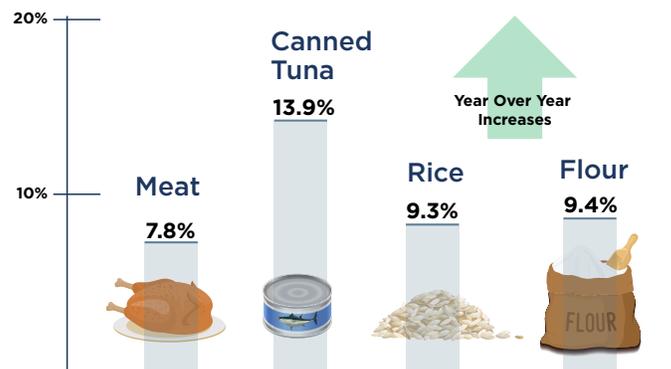
March 2020: 1 in 5 Youth NEET



April 2020: 1 in 4 Youth NEET



Basic Food Prices Have Increased Dramatically*



*As reported in November 2020 Report.

GIVE OAKVILLE



GIVEOakville is The Foundation’s online crowdfunding campaign that featured 54 charities in 2020. During the months of November and December, GIVEOakville gives Fundholders, families, businesses and members of the public the opportunity to shop at our virtual “charity mall” and give back to their community through our online catalogue.

This year with the combined generosity of our Fundholders and community support, we raised over \$510,000 for 54 local charities, with 21 of these charities receiving full funding. With additional dollars from the Oakville Resiliency Fund, we were able to grant over \$764,000 to our charity heroes!

The charities were listed in the online giving catalogue with requests of up to \$25,000 to support specific projects or to support operating costs. The innovative online catalogue allows community members to learn about the work of each charity as well as providing a view of online donations in real-time.

Donors received a tax receipt and The Foundation continued to cover all credit card transaction fees to ensure 100% of donations went directly to these critical support services.

Don’t forget, you have a chance to GIVE during the holiday season of 2021!

“ We just wanted to say a huge “Thank you!” for your ongoing support. We are so grateful to The Foundation, your Fundholders, and all of the public donors who have believed in and invested in us.”

Start2Finish



Let’s rally behind the Charities that are supporting our community.

www.giveoakville.ca

GIVEOakville is All Local - And All Donations matter!
November 2 - December 15, 2020.




oakville
community
foundation

50+
CHARITY HEROES
THAT NEED YOU!

The Emergency Community **Support Fund**

As a member of Community Foundations of Canada, local foundations like ours participate in national programs. Our founders saw a local community foundation as a vehicle to support our community through challenging times, like a pandemic. Today we give thanks and can capitalize on their vision in new and unique ways, as seen with our participation in these national programs.

“Without a doubt, the technology purchased through this grant allowed those that were most vulnerable to stay connected and involved both spiritually and intellectually.”

Grant recipient, Shaarei-Beth El Synagogue

The Emergency Community Support Fund (ECSF) was a \$350 million fund funded by the Government of Canada and implemented with Community Foundations of Canada, the Canadian Red Cross and United Way Centraide Canada, in partnership with local foundations across the country.

The goal of the ECSF was to provide support to charities and non-profit organizations serving vulnerable Canadians. Vulnerable populations included older persons, children and youth, Black, Indigenous and people of colour, persons with disabilities and persons experiencing low income.

In the first round of funding in June 2020, The Foundation awarded \$502,500 to 18 local charities and 19 projects. Five months later in November 2020, The Foundation awarded \$181,500 to nine local charities for the second round of funding.

Projects in the first round of funding included Oakville Meals on Wheels Rising to the Challenge to Meet the Need and Shaarei-Beth El Synagogue Congregation of Halton’s Supporting Isolated Seniors in Our Community. The second round of funding included projects such as Black Mentorship Inc.’s COVID-19 Relief and Recovery Program and COVID care for Community Living Oakville.

For the full results of the successful charities, please [click here](#).



EQUALITY FUND.CA

Launched in December 2019, the Fund for Gender Equality is part of a five-year initiative to advance gender equality in Canada and was created after the Government of Canada issued a call for the Partnership for Gender Equality. The Fund for Gender Equality provides funding to local organizations that support women, girls, Two-Spirit and gender-diverse individuals who are working towards a future grounded in equity, inclusion and justice.

“Being able to participate in this National program has allowed us to support local organizations whose work is grounded in building a just future, advancing women’s rights and gender equality and creating a better Oakville for everyone.”

Mary Lui, Fund for Gender Equality Review Committee



The Foundation took part in the Pilot Fund for Gender Equality to explore ways to support leadership in the women’s movement and advance gender equality in all communities. The Foundation joined other community foundations throughout Canada to shift power to women, girls, Two-Spirit and gender-diverse people, to work towards a future grounded in justice and gender equality. The Foundation distributed \$50,000 to 5 charitable organizations advancing these goals. This included Big Brothers, Big Sisters of Halton and Hamilton’s Girls Linking Our Worlds (GLOW) and SAVIS (Sexual Assault & Violence Intervention Services) Voice of Change, Advocacy & Leadership (VOCAL).

[Click here to see the full list of supported projects.](#)





The Investment Readiness Program (IRP) is a national initiative funded by the Government of Canada. The IRP provides support to social purpose organizations (SPO's) in non-repayable capital to improve their capacity to invest in innovation, participate in the social finance market, access new investment and contract opportunities and support them throughout the innovation. SPOs include charities, non-profits, co-operatives, hybrid social enterprises and mission-focused for-profits who are advancing a social, cultural, or environmental mission.

“ We were pleased to participate in such a groundbreaking initiative to support Social Purpose Organizations in our community who are working to solve critical environmental, social and cultural challenges. This program not only helps them achieve their goals but also prepares them for a broader investment in the social finance market.”

Ameeta Vijay, Program Related Investment Deal Review Subcommittee

The Foundation acted as the lead Partner of the Brant | Halton | Peel Partnership, a consortium of six community foundations: Brampton & Caledon Community Foundation, Brant Community Foundation, Burlington Foundation, Community Foundation of Halton North, Community Foundation of Mississauga and Sheridan College, which operates EDGE - a hub for impact entrepreneurship.

In the first funding round, the Oakville Community Foundation and its Regional Partners awarded over \$770,000 in funding to 22 organizations. Local organizations included Food For Life and the Lighthouse Program for Grieving Children. These funds supported services such as business and strategic planning, marketing services, financial and tax services, legal and risk management services, market research and more. By going through the IRP, social purpose organizations increased their own capacity and prepared for the growth investment would provide.

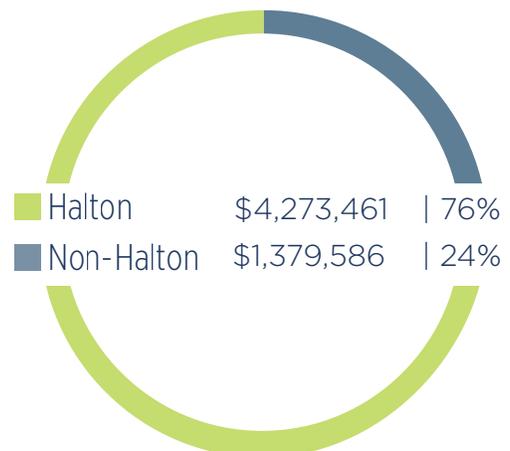
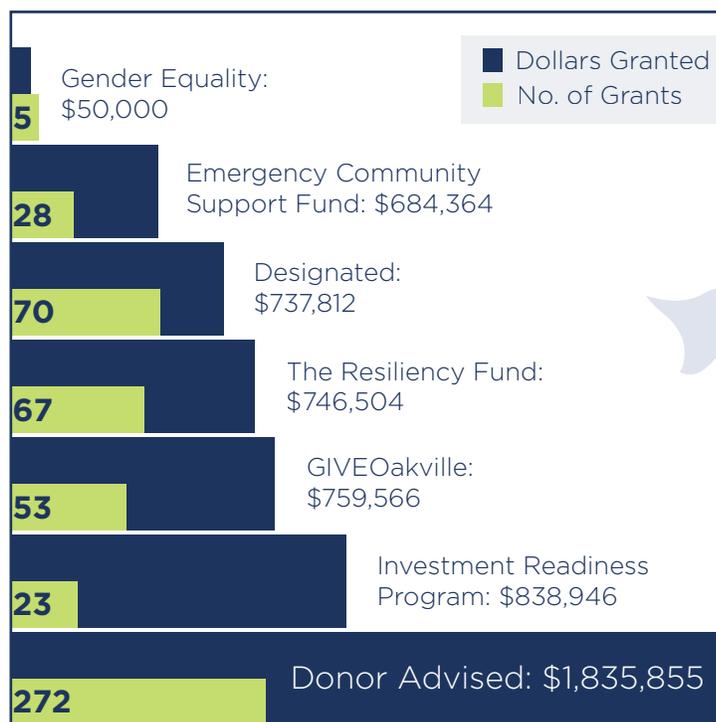
For the full list of organizations funded by IRP, please [click here](#).



Grantmaking To Build Back Better

The Foundation offers donors a powerful and diverse range of opportunities to drive positive change. We enable donors to grant to CRA designated charitable organizations and initiatives. Together with our Fundholders, our community granting is a focused, collaborative effort to build back better.

Granting Totals 2020: \$5,653,047





Shape & Inspire Your Legacy

What does it mean to leave a lasting legacy? When we pass on from this life, our remaining family members and friends are often faced with the struggle of making final arrangements during a time of tremendous grief. You can alleviate the stress on your family and ensure that your wishes and passions are celebrated by establishing a Legacy Memorial Fund.

“The Noble Effort”: Don Noble’s family legacy

On September 26, husband, father, grandfather, and philanthropist Don Noble passed away in Oakville. A kind, generous and curious man - as described by his wife Marilyn and daughter Debbie - Don left behind a loving family and great legacy.

He loved gardening, golfing and completed the Globe and Mail crossword puzzle every day. But most of all, Don loved his family.

Don grew up in Shallow Lake, Ontario - a small town just outside of Owen Sound - with his parents and seven other siblings. They went to church every weekend which, according to Debbie, was instrumental in Don’s belief in the obligation to give back to his community.

Marilyn and Don met at a dance at Sauble Beach, while Don was going to Western University and Marilyn was teaching. Marilyn’s friend noticed that Don was looking over at her and encouraged her to accept a dance.

“I looked like a sour grape because I didn’t really want to be there,” **laughed Marilyn.** “But he asked me to dance. After, he said he’d like my phone number and I said, ‘Well if you want my number it’s in the book, you can look it up.’ He couldn’t believe what he heard.”

Shortly after their chance encounter, Don asked Marilyn to go on a date to the movies, which then turned into 63 years of marriage.

“A chance to give back.”

Don was instrumental in the creation of the Oakville Community Foundation and is credited as one of the founders. The community foundation movement was gaining traction and Don was interested in the notion of a foundation whose purpose was to support the community.



Together with other founders, including specifically Bill Deyell, they created the Community Foundation of Oakville, now called the Oakville Community Foundation. Don then went on to help create the Community Foundation of Grey-Bruce, which serves Owen Sound. Don's parents Percy and Kathleen Noble were the first there to open an endowed fund.

"He had always been a member of the church and participated in fundraising," said Debbie "But I think when he retired he really got the chance to give back to his community and that is why he did a lot of this."

"It always came back to family."

After his retirement, the Noble family settled in Oakville and Don got a chance to spend more time with his family. His first project was a book written about his father Percy, who spent 15 years as a Member of Parliament, and the Noble family. Each of Don's siblings and relatives was given a copy of the book, "The Noble Effort."

But it was the family time that was most important to Don.

The dinner table on a Sunday evening at the Noble house was always filled with food, family and conversation. They'd trade stories and discuss the news and current events. After dinner, Don's granddaughters, Jessica and Ashleigh, would head into his office to grab three Werther's Original butterscotch candies from their hiding place, one for their grandfather and one each for themselves.

"They would come to the table and say 'Grandpa, I think it's time to take us for a walk,'" said Debbie. "And he'd get up and sure enough they'd have the candies in their hands or in their pockets."

“He was really all about following your dreams and figuring out what it is you want to do in your life and try to do it,” **said Debbie.** “Even with my girls, he wanted them to pursue their education and then find something they liked. You work to live, not live to work.”

Don loved to know what was going on in his family's lives. Debbie attributes her career as a lawyer to her dad's encouragement. He always tried to research the careers and jobs his family was pursuing to be able to help them and be able to offer advice.

About 8 years ago, Don became the oldest recipient of a kidney transplant after spending several months on dialysis. It came back to the family then too, as Debbie donated her kidney to her father.

Debbie recalls waking up the morning after the surgery and opening her eyes to see her father standing at the foot of her bed.

“He walked over from his room with his IV pole and the second I looked at him he said, ‘What are you doing? You’re not out of bed yet?’” recalled Debbie. “He finally had a kidney that was working for the first time in ages so he was feeling great. I told him to go back to his room but that was Dad: he had to come down and make sure with his own eyes that everything was okay.”

It’s been a few months since Don passed away, but his favourite Noble family tradition continues with Sunday night dinners and the chance to be around the table together.



“With everything,
we do it all as a family.”

Don Noble,

Husband,
Father,
Grandfather,
and Philanthropist



Leave A Lasting Legacy:

Create A Memorial Fund at The Foundation

At The Foundation, we create Funds that operate much like a private foundation. By investing and growing the initial gifts, we create a legacy of giving in your or your loved one's memory, that will last far beyond a single lifetime.

In 2020, we were honoured to work with a number of families to create Memorial Funds for their respective loved ones. Each Fund ensures the gifts are aligned to the passions of their loved ones and allows family and friends to continue to celebrate their legacies.



Noah Ralph-Jamieson Memorial Fund

The Noah Ralph-Jamieson Memorial Fund focuses on supporting charities whose overall goals speak to the spirit of what Noah valued. This includes the support of food banks, the LGBTQ+ community, animal shelters and rescues. Each year his family, with your support, will choose a special organization to be the recipient of a gift in honour of their son's kind and generous heart.



Zara Buren Memorial Foundation

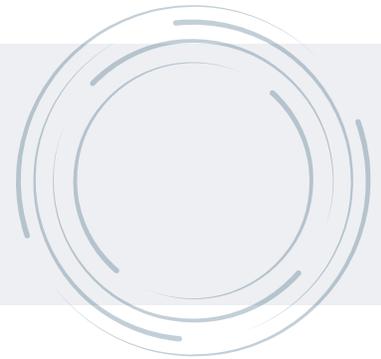
With the purpose of creating the Zara Buren Memorial Foundation, Zara's family started a GoFundMe campaign three days after her death that surpassed its \$100,000 goal in nine days. With this incredible generosity, they created a Foundation that will focus on helping youth, who much like Zara, have the desire, talent and work ethic to pursue their passion.





Tammy Weiss-Couto Memorial Fund

In loving memory of Tammy and all that she did for Oakville, this Memorial Fund has been established to help us celebrate Tammy and build a legacy in her honour. Tammy was a champion for women going through challenging times. Tammy's Fund supports women, who for various reasons, are struggling with health, well-being, and other demands in life.



Louise Mary Whiten Memorial Fund

Louise assisted countless children from birth with their speech at several organizations including ErinoakKids Centre for Treatment and Development before moving into private practice. Her family established the Louise Mary Whiten Memorial Fund to honour Louise's legacy in her field and continue to foster her devotion to helping children.

Honouring a Loved One

Loss is hard, with many complicated and complex decisions to navigate. A memorial fund at The Foundation provides a simple and burden free way for family, friends and the community to recognize a loved one's legacy. A memorial fund is a long lasting and personal way to receive immediate online donations and also allows your loved one to be remembered for years to come.

To learn more about establishing a memorial fund, contact **Sarah McPherson, Director of Philanthropy & Communications** at sarah@theocf.org to get started today!

The “Philanthropic Talk” and Future Planning with Advisors.

Professional Advisors play a critical role in helping their clients create and realize their philanthropic vision. As Oakville’s Leading Philanthropic Solutions Provider, we continued this year with the goal of educating and engaging local Professional Advisors and making them aware of the charitable gift options that are available for their clients.

The uncertainty of the COVID-19 pandemic has many of us thinking about future planning, and in that vein, the Canadian Association of Gift Planners’ (CAGP) new WillPower™ campaign could not have come at a better time.

Will Power™ is a public education effort aimed at empowering more Canadians to leave a gift in their Will to charity, an act that could significantly advance the causes you care about. WillPower™ aims to make gifts in Wills the social norm, with the goal to open-up \$40 billion in gifts to charities by 2030.

“We know there are many misconceptions surrounding legacy giving. Making gift giving in Wills the social norm is something no one entity can do alone.

Through the WillPower Campaign™ we aim to educate your clients, and inspire them to make a meaningful difference. In fact, research shows that when clients are prompted to leave a gift in their Will, charitable bequests increase by 120%. It’s time we open-up philanthropy in Canada, and Professional Advisors are the key to creating more social good.”

**Paul Nazareth, Vice President,
Education & Development, Canadian Association
of Gift Planners (CAGP) - Pictured**





Talking about philanthropy with your clients can actually help make you their most trusted advisor.

The Foundation acted as a lead partner, as we joined with more than 80 charities, financial advisors and legal services from across the Hamilton-Oakville-Niagara Region to show Canadians how they can leave a gift to charity in their Will while still taking care of the ones they love.

“Choosing to participate in this campaign was never an option. We needed to do it for our local charities and for the well-being of our community, as we know how important philanthropy is in supporting the community’s most vulnerable,” said Les Ross, Member of the Community Legacy Building Committee and PearTree Canada’s Vice President of Business Development. “Sadly there are so many of us who don’t realize that they can give to charity through their Will, and also support their own family.”

With the importance of this campaign, we wanted to ensure our local charities were engaged as many have philanthropy-minded clients who are looking for ways to increase their charitable horizons. The Foundation supported five local charities and enabled them to benefit from the network of professionals involved in this campaign.

In August, we hosted the “Building Your Business Through Philanthropic Conversations” webinar which was generously sponsored by PearTree Canada, as part of the WillPower™ campaign. This webinar was led by Paul Nazareth, at CAGP, who took time to speak to advisors in the finance, business and legal sectors on the importance of planned giving and having philanthropic conversations with their clients.

Paul is a knowledgeable and passionate speaker and we want to thank him again for being such a large part of this event’s success. The Foundation will be participating in the national WillPower™ campaign beginning in the Fall of 2021.



The Importance of Future Planning: All it takes is a little WillPower™

We know that talking about your Will can be difficult. It brings up a lot of things we'd rather not think about. However, this document can be a powerful tool for building community and providing the charities you care about with the resources they need. If done right, it doesn't have to come at the expense of your children's inheritance.

There are numerous ways to plan your generosity so that it impacts the future generations. Depending on your preferences, financial position and other factors there will be a Planned Giving option that's right for you. But, for now, let's start with the end - your Will.

Making a charitable gift through your Estate can result in significant tax savings. A charitable bequest in your Will can provide a percentage of your Estate, or a gift of the residue (which consists of whatever remains in your Estate after gifts to your loved ones and all expenses have been paid).

Not only can we effect change today, but we believe that the future strength and prosperity of our community starts with long-term investments made today. Our job at The Foundation is to keep an eye on our community's needs and put resources where they are most needed.

If you haven't already done so, we encourage you to think about how you can begin the journey of philanthropic giving - not only for your own legacy but for your family and loved ones - through a gift in your Will.

91% of advisors think they are
talking philanthropy with clients.
Only **13%** of clients
remember the convo.

SOURCE: DOING GOOD FOR BUSINESS - THE INCLUSION OF PHILANTHROPY IN THE
CANADIAN PROFESSIONAL ADVISOR'S BUSINESS PRACTICE, SEPTEMBER 2018

 **WILL
POWER™**

Partnering In Philanthropy.

We are often asked questions about why you should work with The Foundation to meet your philanthropic goals. Maybe it's to give back to a charity you care about or to help educate your children, or it could be to help ensure Oakville's prosperity for future generations. Whatever the reason, we have a philanthropic solution to meet your unique needs.

It's All in the Family: Inspiring Generations of Giving.



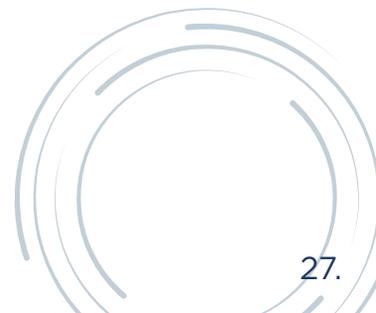
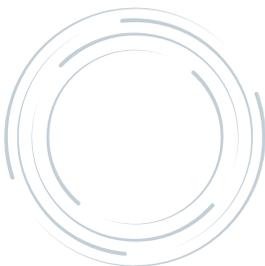
The Peternelj Family

“When you help other people you’re also helping yourself.”

One of The Foundation's newest Fundholders, Rudy Peternelj learned at a young age the importance of giving back. Today, as a busy father of three teenage daughters and with a thriving career, Rudy wanted to make sure he carved out time for philanthropy. With the help of The Foundation and the commitment of his daughters, Rudy is able to meet his charitable goals and build community in the process.

Learning from the Best

It's no surprise that Rudy's philanthropic values were instilled in him by his parents. The son of Slovenian immigrants, Rudy was born in Toronto and moved to Oakville at the age of 10 where his father started his business and has spent the majority of his life either living or working in Oakville ever since.





“My parents have always been very generous and I was always impressed and inspired by them,” **recalled Rudy.** “When their friends had tough times they were always willing to help and lend a hand.”

With his father building his very successful business, Industry Diesel, Rudy understood very early on the value of helping others who were less fortunate than his own family.

Rudy’s mother Josie was quick to jump to the aid of a family from their church who had lost their home due to a gas explosion. She was always willing to provide support to anyone who was in need, whether it was giving clothes or opening her doors for people to stay. His father, Albin, had a similar giving nature. Rudy recalled how his father would repair car parts free of charge through Industry Diesel in support of charity.

From his parents’ example, it was obvious to Rudy that there was something important to be found in helping others, “when you do something and you don’t expect anything in return, it just makes you feel good.”

A Multi-Generational Legacy

Inspired by the giving spirit he grew up with, Rudy knew he wanted to engage in philanthropy wherever he could, but most importantly he wanted to make sure he passed this legacy of giving onto his three teenage daughters. “I always wanted my kids to get involved with charitable work and be conscious of what they could do in their community,” said Rudy.

As a long-time subscriber of The Foundation’s email newsletter, when he was ready to create his own Fund, he knew exactly where to go. After discussing his options, Rudy decided to open a Donor-Advised Fund with The Foundation.

A Donor-Advised Fund functions much like a private foundation and provides the Peternelj’s the freedom to grant to any registered charity in Canada every year. Rudy said he appreciates The Foundation’s streamlined process and the tailored list of charities based on the Peternelj family’s philanthropic interests that were provided.

The Fund, called the CARE Peternelj Fund, is named for the first initials of Rudy and his three daughters; Charlotte, Anastasia and Elizabeth, with the goal of the Fund to support the charities he and his daughters feel passionate about.

Creating Bright Futures

Rudy's daughters took it upon themselves to carefully explore the charities they wanted to support. "They did some research and found charities that they felt needed the most help and I was impressed with how thoughtful they were what they chose," said Rudy.

In the end, Anastasia, Charlotte and Elizabeth chose to support charities that are geared towards supporting youth in our community. After careful research, the girls pinpointed the growing issue of youth homelessness and the growing mental health crisis amongst young people. "They know that kids out there need help," said Rudy, "They are lucky to have a family that supports them. But some kids don't. It's nice to be able to support where others need it."

Rudy explained that he loved the personal approach The Foundation provides for their Fundholders, "when we received the first couple of notes from the charities it was really heartwarming for my girls to see."

Most of all, Rudy hopes that the spirit of giving will continue on in his daughters. When asked what he hopes his own legacy will be, Rudy replied, "that I've instilled values in my kids and that they grow up to be good people."



Women's Giving Collective.



Julia Hanna And Wendy Rinella mixing it up during a live Women's Giving Collective Zoom Event.

The Women's Giving Collective (WGC) completed its second year in 2020, and made its second grant of a three-year commitment to Heartache2Hope. Combined with the first year commitment, the WGC has now provided a total of \$16,500 to support those who are dealing with suicide loss.

“I would have a much smaller impact if I was donating by myself but as a member of this Collective I feel that I can make a difference and be part of a group of women with the shared goal of supporting my community.”

Kimberly Schols, Women's Giving Collective Member

The WGC is led by a group of more than 30 women who have chosen to take part in a collective impact initiative by pooling their resources. Together, the members decided on an area of high need that they were interested in granting to. WGC members elected to support charities that are serving women in our community.

Members of the WGC give an annual amount which is then divided and applied to two Funds - An Endowed Fund and a Flow Through Fund. The WGC Endowed Fund receives 60% of the annual contributions, and the Flow Through Fund receives 40% of the annual contributions and is the source of their yearly granting. Creating a permanent Endowed Fund will ensure future years of support will always be available for local granting to organizations that meet the WGC priorities - women in education, support networks and mental health.

Collective members take part in approximately four meetings throughout the year, where they take the time for education and socializing all while taking a leading role to give back to their community.

Bindu Cudjoe | Bonnie Jackson | Daniela Hampton-Davies | Debbie McPherson | Dianne Lemieux | Donna Doherty Lozon | Eve Willis | Esther Hagerman | Joanna Jackson | Jeanne Crocket | Lisa Kohler | Liz Galloway | Louise Brownlee | Mira Backo Shannon | Martha Hill | Natalie Jamison | Patti Hnatiw | Tamara MacCormack | Beth Robertson | Nam Pinto | Brenda Barrington | Lynn Petruskavich | Susan Mollenhauer | Joanne Peters | Kimberly Bell Schols | Michele Whitcombe | Christine Langevin |*

*four members wish to remain anonymous

If you are interested in joining an inspiring group of local women, contact Sarah McPherson, Director of Philanthropy and Communications, at sarah@theo.org.

[Click here to visit the Women's Giving Collective page.](#)





Community Classroom Online.

The Foundation’s Community Classroom program, now in its fourth year in Oakville, provides publicly-funded elementary school students from kindergarten through Grade 8 in Oakville the ability to participate in an arts, culture, heritage or environmental program for free.

Community Classroom provides students the opportunity for in class programming or field trip visits to local arts and cultural sites. However, with the closure of elementary schools, The Foundation quickly pivoted this offering to meet the needs of teachers and students. With the help and dedication of our community partners, The Foundation launched our virtual offering, Community Classroom Online which is available through our website.



Featured Oakville Galleries, Art From the Heart, and ArtHouse

The new virtual platform features lessons and videos from our Community Classroom partners at ArtHouse, Art from the Heart, Canadian Caribbean Association of Halton, CRASH Rhythm, Halton Environmental Network, Oakville Chamber Orchestra, Oakville Galleries, Oakvillegreen, Oakville Museum and Oakville Symphony Orchestra. These programs allow students, teachers and families the opportunity to enjoy curriculum-based learning right from the comfort of their own home.

Community Classroom Online features a variety of videos and activities, ranging from music and art lessons to environmental and science-based sessions. Due to this year's online format, we are proud to report that Community Classroom has been able to reach more students than ever before.



Featured The Canadian Caribbean Association of Halton, Oakville Symphony

Community Classroom Online is made possible through the partnership of our program's Connecting Sponsor Toronto Pearson and grade-specific sponsors Ontario Trillium Foundation and Sagen and many dedicated donors.



Homeward Bound Halton.

Homeward Bound Halton is the longest supported initiative by The Foundation and its Fundholders. In 2020, The Foundation directed over \$100,000 to Home Suite Hope with \$40,000 specifically to support single parent mothers through the Homeward Bound Halton program. Through the Oakville Resiliency Fund, Home Suite Hope was able to purchase refurbished laptops as well as internet packages to enable connectivity during a time of social distancing.

The Homeward Bound Halton program focuses on education as the way to self sufficiency. It provides wrap-around supports including intensive case management, a rental subsidy, community referrals, mentorships as well as a scholarship to complete a two-year college education at Sheridan College in marketable programs, including business, IT or skilled trades.

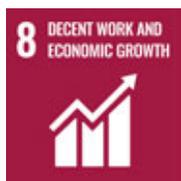
In 2020, The Homeward Bound Halton (HBH) program served 24 single parents and 36 children. Despite the challenges of the COVID-19 pandemic, the program welcomed 8 new families to begin their journey to stability through the Homeward Bound Halton program.

Home Suite Hope also celebrated 4 participants that graduated from Sheridan College, bringing the count to 15 participants that have been able to achieve their post-secondary education through the Homeward Bound Halton program since inception.

As of 2020, of the participants who have completed the HBH program, 100% have transitioned off of Ontario Works, 86% are employed and the average annual salary amongst them is \$48,000.

The Foundation is proud to be a partner in this unique program. We recognize the importance of creating long-lasting and sustainable solutions for our community members, and are proud to continue to support these important wrap-around services.

If supporting Homeward Bound Halton is of interest to you, please reach out. We'd be happy to share how we can help you support Home Suite Hope now and in the future.



Halton Youth Collective Program.

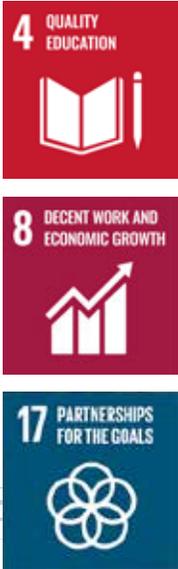
The Halton Granter’s Roundtable began as a group of funders who wanted to identify ways to collaborate, address priority needs in the community and create a more substantive impact to benefit local charities and the people they serve. After engaging with researchers, it became apparent that youth transitioning from care was a central issue in need of attention.

Every year in Ontario, youth transition away from child welfare services as they’re “aged out” of the program, but this transition is difficult due to the lack of education or support offered. Difficult transitions for Youth Transitioning from Care often result in a series of negative outcomes ranging from homelessness, unemployment, lack of educational engagement and achievement, involvement in corrections, lack of skills and potentially, a life of poverty (Hub, 2019).

Data from Halton Children’s Aid Society programming (as at 2017) showed that more than 1 in 4 of youth or over 25% of those aged 18 - 24 were not in education, employment or training (NEET). It was to remedy this alarming number that the Halton Youth Collective decided to focus its efforts on a wraparound, client centric approach to assist these youth.

“So helpful. I got funds to get a winter jacket and boots around winter time. The team helped with financial problems and housing. It also helped a lot to have someone like [my mentor] to talk to.”

HYCP Youth Participant



	My mentor listened to me and understood my issues	I am happy with the services and supports I received in this program	I am better able to deal with issues that I sought help with	Overall, I feel that I have benefited from participating in the program
Agree	16 (72%)	20 (83%)	14 (58%)	20 (83%)

Data from Halton Youth Transitioning from Care Pilot Study - 2020

To test this approach, the Halton Youth Collective **launched a 1-year pilot program to work towards the goal it had set - that by 2022, 90% of youth, aged 18-24, supported by CAS Halton, are satisfied with their education, employment or training.** Through incentives, individualized supports, as well as mentorship, the pilot focused on the needs of 26 youth on their path to being satisfied in their employment, education and training. Despite the challenges of COVID, the Pilot continued in its support of these youth and the Collective met its goal before the 2022 date set out. Through the work of the Collective:

- Youth were connected to a caring adult/mentor.
- Youth have long term goals.
- Youth’s needs were met to address barriers to employment, education or training.
- Youth have sustainable, continuous housing.
- There’s a pool of ready mentors as the program rolls out beyond the pilot.
- Youth have built trusted, informal relationships.
- Youth were employed and employable.
- There were a variety of accessible, paid education, employment, training and treatment options for youth.

The work of the Collective and the findings of the Pilot Program can be found by clicking here.



Despite the challenges of COVID, the Pilot continued in its support of these youth and the Collective met its goal before the 2022 date set out.

HYC is currently gathering youth referrals for the 2021 program intake: 30 youth participants in total - 10 to carry on from the pilot and 20 new

Community Education Awards **HUB.**

In February of 2020, The Foundation introduced the Community Education Awards Hub, a brand new portal that allowed students who are post-secondary bound the ability to access awards from local organizations, entirely online.

In the midst of this global pandemic, The Awards Hub serves as an example of the successful shift in providing philanthropic services through technology and connecting education award providers with post-secondary bound students seeking support.

The Foundation saw an opportunity through its new technology provider to take community connection one step further. By creating an online Awards Hub for Oakville-area students, we've simplified the process for students and transitioned countless paper applications into the digital world. With the introduction of The Awards Hub, The Foundation saw the opportunity to honour one of our original Fundholders, and launched the Alexander and Bernice DeMaio Education Award.

Along with our seven Award Partners from local organizations, the Awards Hub offered 32 different bursary, scholarships and awards for local students. From January to May, 525 students accessed and utilized The Awards Hub, and we are happy to announce that over \$238,000 was awarded through The Hub in 2020.

Thank you to our participating Award Partners: The May Court Club of Oakville, Halton Learning Foundation, The Halton Region Chinese Canadian Association, The Rotary Club of Oakville, The Oakville Lions Club, and The University Women's Club of Oakville and IODE.



University Women's Club
of Oakville Scholarship Fund



About the Alexander and Bernice DeMaio **Education Award.**

Alexander and Bernice DeMaio found fulfillment in their lives through philanthropy. Starting with a generous donation to the Oakville Community Foundation over 25 years ago, their efforts to help others and make a difference continues years after their passing. To honour their legacy, the Oakville Community Foundation created the Alexander and Bernice DeMaio Education Award to support 3 Oakville students.

We would like to offer our congratulations to the recipients of this year's DeMaio Education Award. The three students were chosen out of 46 applications and are attending nearby schools, including Sheridan College, McMaster University and the University of Toronto. They are in a variety of programs ranging from business to science to the arts.



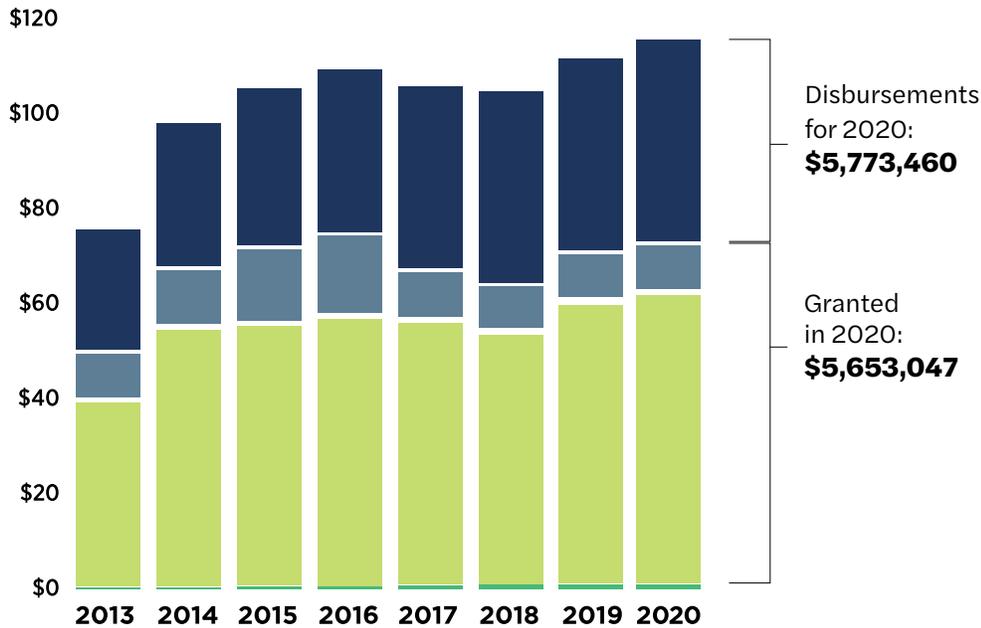
Bernice & Alexander De Maio

If you are interested in supporting any of these Foundation initiatives, please contact Frances Pace, Director, Fundholder and Community Engagement at: frances@theocf.org.

Finance And Investments Overview

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.

Fund Balances By Type (Millions)

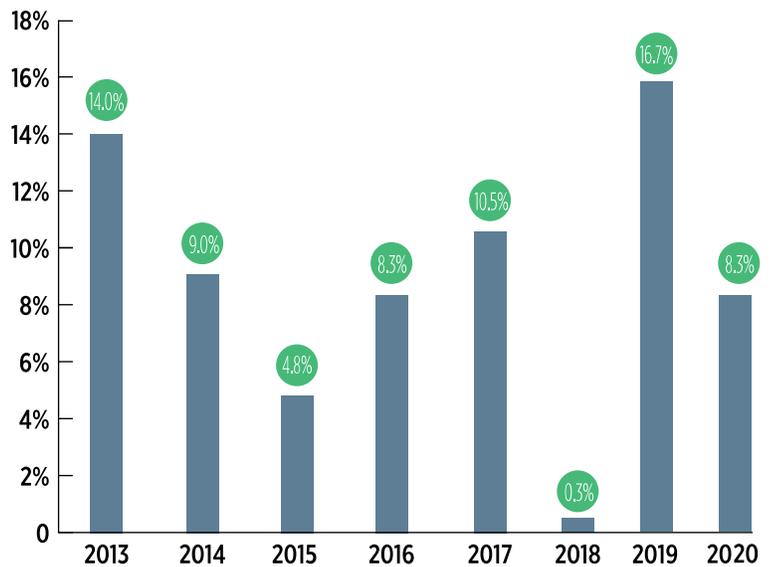


- Held on Behalf of Community Organizations
- Grant/Flow-Through
- Endowed
- Operating and Stabilization



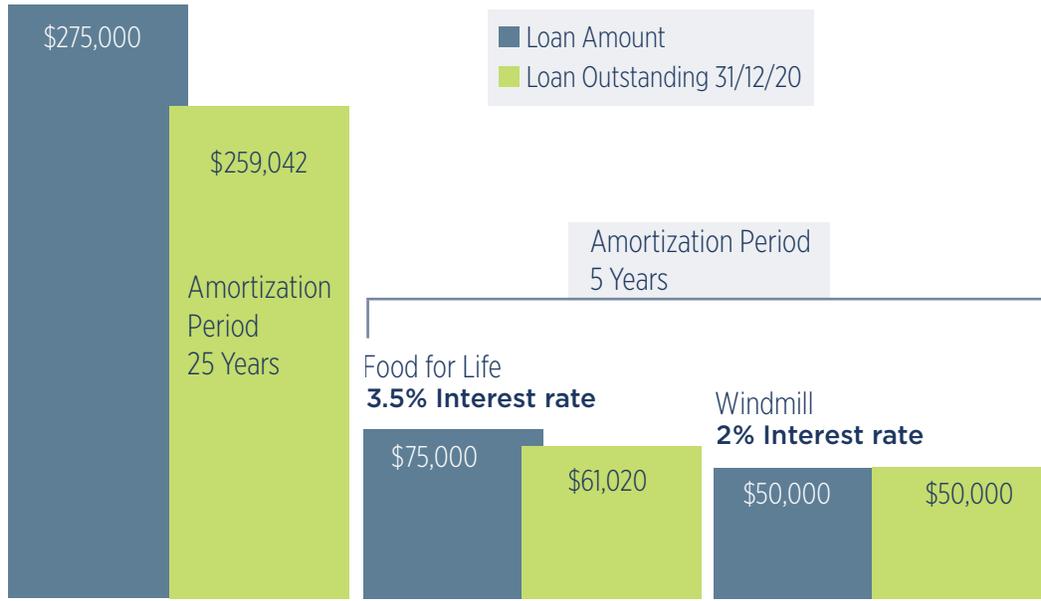
	Annualized Returns
3 Year	8.3%
5 Year	8.7%
10 Year	8.4%

Audited Financial Statements are available
www.theocf.org/financial-statements/



Program-Related Investments are made for more than financial return with a focus on supporting a solution to a social, cultural or environmental issue.

Halton Children's Aid Society
3.5% Interest rate



Total Loan Amount: \$400,000 | Total Outstanding: \$370,062



In 2020, The Foundation added a third Program Related Investment to its portfolio with Windmill Microlending, with an investment of \$50,000. Windmill Microlending is a nationally registered charity that helps immigrants and refugees, with loans of up to \$15,000, to pay for the credentials they need to restart their careers in Canada. This year, Windmill Microlending served 56 clients within the Halton Region, with 18 of those living in Oakville.



Students & Interns

A Special Thank You to our Students and Interns:

We would like to give a huge thank you to the students that we had the opportunity to work with over the past year.

The Foundation partnered with Sheridan College's Centre for Mobile Innovation and the Town of Oakville to hire students to develop an app for the Heritage Trails.

The Digital Trails Project seeks to overlay mobile computing technology onto Oakville's vast network of Heritage Trails. The project seeks to make the trails accessible to a wider audience and create an engaging and enhanced sense of belonging, for all users.

We would like to thank our partners at Sheridan College's Centre for Mobile Innovation, the Town of Oakville and the students involved in developing this app: Kenneth Uyabeme, Michael Banks and Cory Da Silva.

This year we were honoured to work with two resourceful interns who supported our Communications Team. First, Olyn Stoica, a student from Abbey Park High School who acted as a research assistant for the Oakville Resiliency Report. Secondly, Emma Harman from RBC's career launch program who supported the marketing efforts for GIVEOakville and a rework of The Foundation's website.

We are grateful for all of their hard work and support and wish them all the best in their future endeavours.



Sheridan | Get Creative

**A special thank you to Magdin Stoica,
Program Coordinator,
Honours Bachelor of Computer Science
(Mobile Computing) at Sheridan College.**



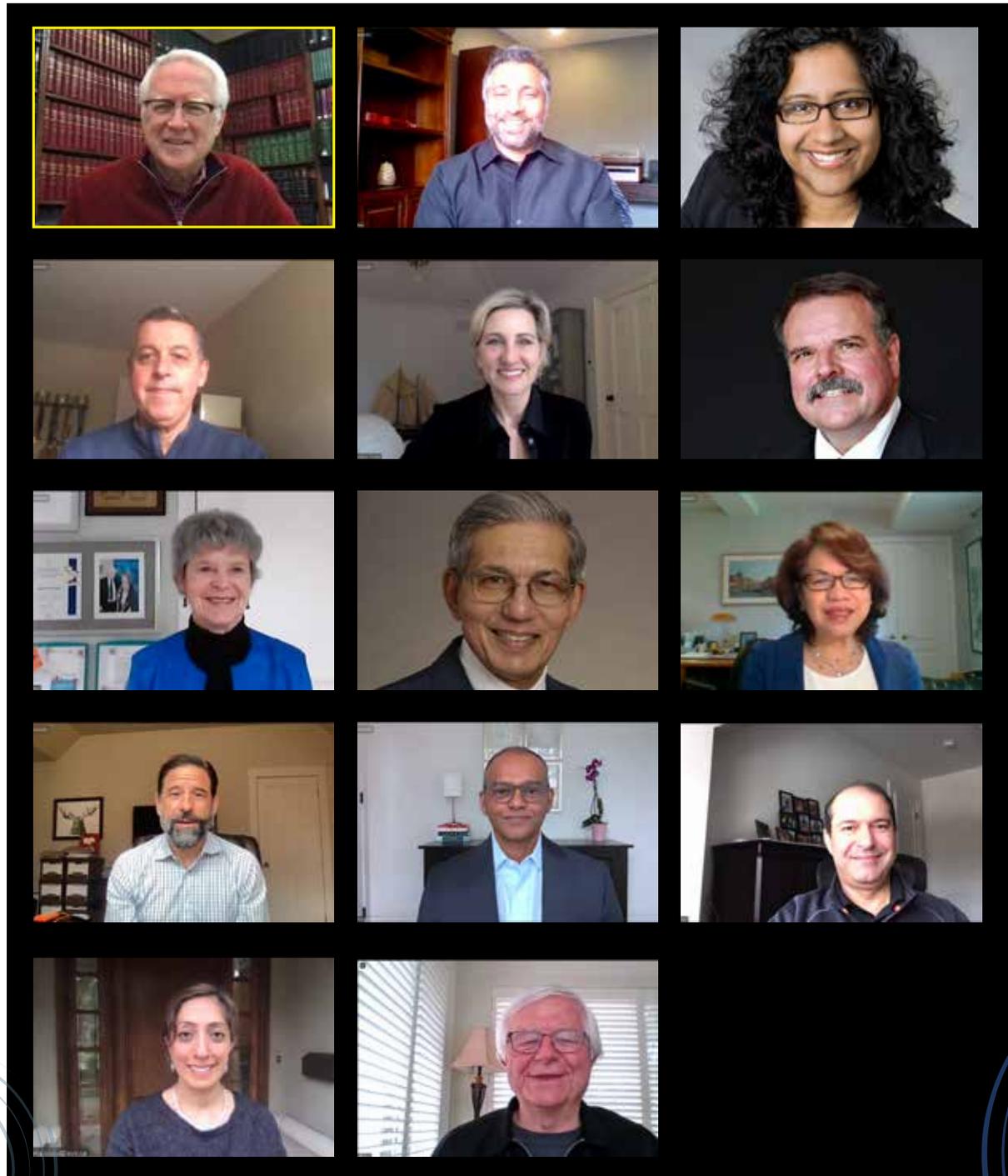
**A special thank you to RBC's
career launch program**

Governance

Board of Directors

Board Members

Brian Hanna (Chair), Rob Budhwa, Bindu Cudjoe (Vice-Chair), Sam Greiss, Daniela Hampton-Davies, Chuck Havill (Treasurer until October 2020), Bonnie Jackson, Frank Lochan, Mary Lui, Mike Miller, Fred Pinto, Vik Sachdev (Treasurer from October 2020), Ameeta Vijay (Secretary), Tim Zahavich



Governance **Committees**

We are so honoured to work with the following volunteer committee members who supported The Foundation. Through their knowledge, due diligence and guidance, The Foundation is able to ensure we are building community through philanthropy.

Audit Committee

Sam Greiss (Chair), Chuck Havill, Christine Langevin, Mark Lukowski, Frank Lochan, Mike Miller, Tom Rothfisher, Vik Sachdev, Kevin Tremblay

Investment Committee

Mike Miller (Chair), Rob Budhwa, Paul Fahey, Natalie Jamison, Gary Love, John Lydall, Fred Pinto, David Illingworth (Ex Officio)

Program Related Investment Deal Review Subcommittee

Ameeta Vijay (Chair), Rob Budhwa, Mike Miller, Mira Backo-Shannon (from December 2020)

Finance & Risk Committee

Chuck Havill (Chair until October 2020), Vik Sachdev (Chair from October 2020), Sam Greiss, Christine Langevin, Frank Lochan, Mark Lukowski, Mike Miller, Kevin Tremblay

Governance Committee

Bindu Cudjoe (Chair), Rob Budhwa, Brian Hanna, Ameeta Vijay, Tim Zahavich

Community Legacy Building Committee

Daniela Hampton-Davies (Chair), Bindu Cudjoe, Brian Hanna, Bonnie Jackson, Mary Lui, Martha Hill, Les Ross, Susan Mollenhauer, Mark Tremblay, Donna Lozon (until May 2020) and Andrew Tyrrell, (from December 2020)

Honourary Solicitor

Michael Whitcombe

Governance

Review Committees

Fund for Gender Equality

We would like to thank the review team responsible for selecting successful applications:

Alicia Sullivan,
Leena Sharma Seth,
Lois Thomas,
Marcus Logan,
Mary Lui,

Charity-Small Business Partnership

Special thanks to our Business Expert Panel members:

Kirby Alguire, Vice President, Finance, Ford Motor Company of Canada, Limited,
Binu Dhas, VP Operations, Hoskin Scientific,
Tino DosSantos, VP of Business Markets for Southwestern Ontario, RBC,
Christine M Langevin, Chartered Professional Accountant, C.Dir., CPA, CMA, CFE,
BComm,

Alexander and Bernice DeMaio Education Award Review Committee:

Daniela Hampton-Davies,
Jim Collins,
Joanne Peters



Governance Team

Oakville Community Foundation Team

(From left to right, top to bottom)

Wendy Rinella, Chief Executive Officer (CEO),

Gillian McLaren, Office Manager & Board Liaison,

Alison Moeller, Chief Financial Officer (CFO),

Dan Ierullo, Accountant,

Lori Armitage, Director, Finance,

Frances Pace, Director - Fundholder & Community Engagement,

Michelle Collins, Fundholder & Community Engagement Administrator,

Jeff Robertson, Data Management Assistant,

Sarah McPherson, Director, Philanthropy & Communications,

Michael Salem, Senior Manager, Communications & Creative Services,

Taline McPhedran, Communications & Events Manager,

Courtney Waddell, Social Media & Communications Specialist



With **Gratitude**

IN MEMORIAM: Lasting Legacies

We remember the following individuals, who were Fundholders, friends and volunteers of The Foundation.

Edel Brasher, Gail Bird, Zara Buren, Scott Burrows, Tammy Weiss-Couto, Albert Hofman, Colin Litton, Ken Nevar, Don Noble, Clifford Patchett, Steve Peros, Noah Ralph-Jamieson, Margaret Ripley, Ralph Robinson, Barbara Snow, Lloyd Tyrrell, Louise Mary Whiten, Anne Whittaker.

20 YEAR FUNDS

We recognize the following Funds that have been building community through their philanthropy in Oakville for over 20 years.

The Brenninkmeyer Family Fund

Chris Cooling Memorial Fund

The Donald Anderson Fund

Jackson Family Fund

The Kenny Family Foundation Fund

Latham Family Fund

The Oakville Public Library - The Birkett Family Fund

The Ontario Endowment for Children and Youth in Recreation Fund

The United Way New Managed Fund

20th Anniversary of Oakville Heritage Trails



Our Partners Sponsors & Friends



To Learn More visit www.theocf.org

Click here to learn more about the
United Nations Sustainable Development Goals
listed in this Report.