



Bringing local solutions TO BIG ISSUES



Annual Report 2022

Land Acknowledgment

We acknowledge all our relations, we acknowledge the first relationship with Mother Earth, the original nations of the trees and plants, the original stewards of the four legged, the flyers, the swimmers, the crawlers. We acknowledge the waters as being life and sacred as we acknowledge the carriers of those teachings, the females. We acknowledge the grandfathers, as well as Father Sun, Grandmother Moon and our distant relations, the stars.

We acknowledge the Oakville Community Foundation is located on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation, as well as the Traditional Territory of the Haudenosaunee and Huron-Wendat people. Further, we acknowledge that the Town of Oakville is covered by Treaty No 14, the Head of the Lake Purchase (1806) and Treaty 22 (1820).

Our year in review.

2022 began with the Russian invasion of Ukraine in February. While this military aggression was a world away, refugee resettlement became a local priority.

Together, with many local residents and Fundholders, we were able to connect resources with local faith and resettlement groups to support local needs. We are truly at our best when we're helping one another and we saw that plainly in the way the community put forth resources to help with the dramatic increase in Ukrainian refugees.

In the spring we returned to a hybrid working office and held our first in person event in over two years. Our Annual General Meeting at the Oakville Public Library was held in conjunction with a Debwewin event. Our partnership with the Mississaugas of the Credit First Nation to further our shared understanding of Oakville's Indigenous past and support local Truth & Reconciliation placed Treaty Signage throughout the Town and launched a website, an Ally Leadership Council and an Allyship campaign. As Elder Peter Schuler advises: "What better place to seek the truth than your own local community?"

In the fall, the Belonging and Racial Identity in Halton report was released. This research began after the murder of George Floyd in 2020. It sought to better understand how racialized individuals felt about their place in this community. The Report lays out some strategies to enable a greater sense of belonging for everyone. Along with the report, a Sheridan graduate and filmmaker turned the findings into Community Classroom videos for use in Halton schools.

On reflection, The Foundation has brought a local lens to national and international issues like the Ukrainian invasion, Truth and Reconciliation and racial equity. We also brought many national granting programs to provide more funding to our local charities.

Throughout the entire year, we were grateful to be able to reconnect with our Fundholders through a number of in-person events and celebrations including the unveiling of the new North Oakville information kiosk dedicated to the memory of Christopher Lockwood. We also ended the year recognizing four deserving Adrian Coote Volunteer Award Recipients during our Holiday Celebration.

Our investment returns posted strong results of 4.6% during the fourth quarter of 2022. The portfolio was -3.4% for the year as a whole, but has consistently performed in the 1st quartile for balanced funds according to both the Global Manager Research (GMR) and Mercer reports. The Foundation granted \$4.3 million and, along with our charitable activities, The Foundation's total disbursements was 7.2%, more than double the 3.5% Disbursement Quota mandated by the government.

Keep reading through our 2022 Annual Report to see our financial highlights and learn about many of the year's exciting initiatives.

Thank you to our staff, committee and board members, volunteers and Fundholders for their tireless work in making Oakville a community where no one is left behind.



Wendy Rinella
CEO

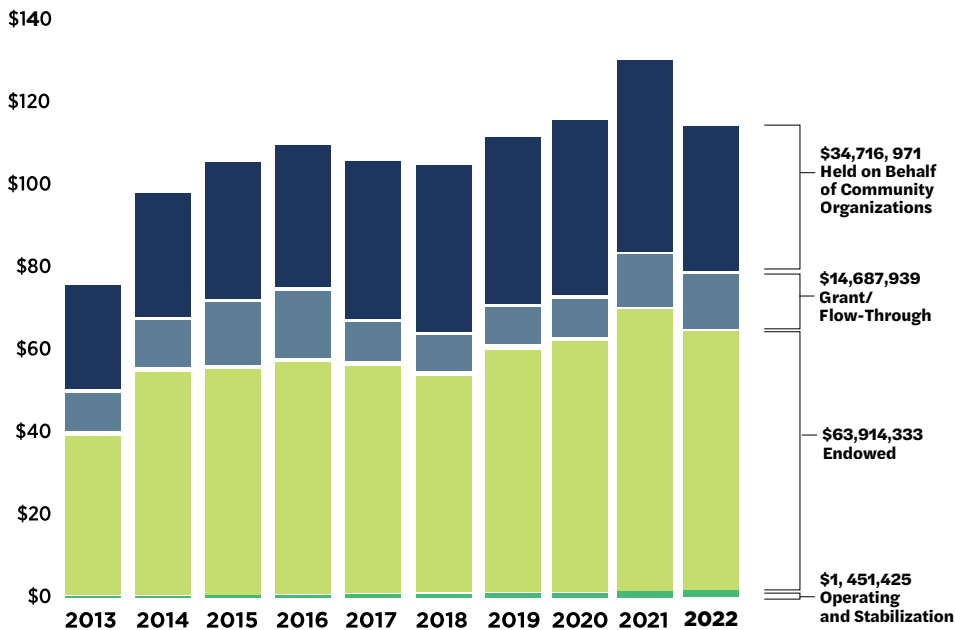


Bindu Cudjoe
Board Chair

Finance and Investments

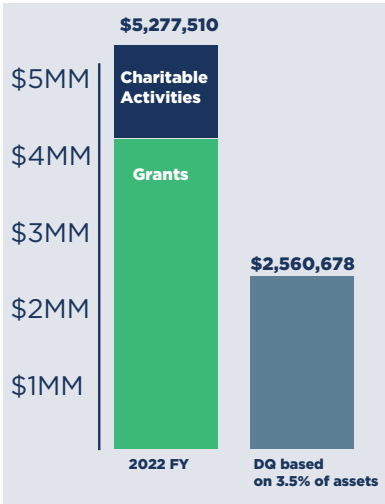
The Foundation provides careful stewardship of the monies given over to our care. These charts and graphs are a way of providing a clear and concise snapshot of our Fund positions for the past year, as well as demonstrating our historical data.

Funds By Balance Type

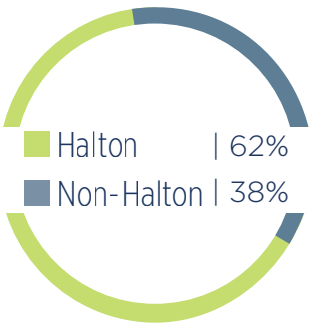


GRANTS in 2022: \$4,282,272

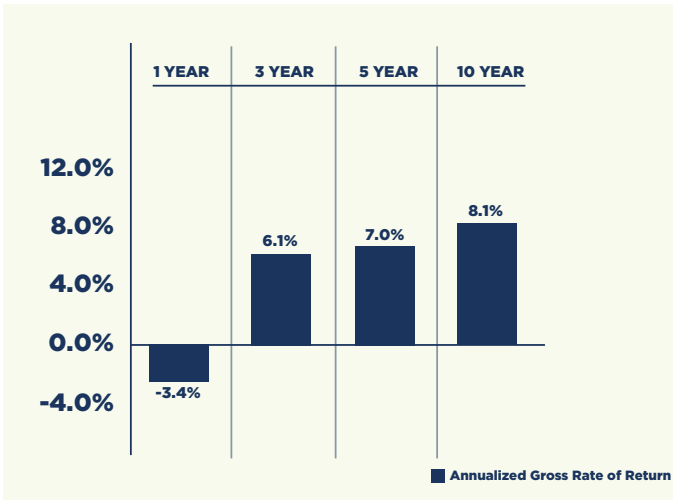
2022 Granting and Charitable Activities & CRA Disbursement Quota



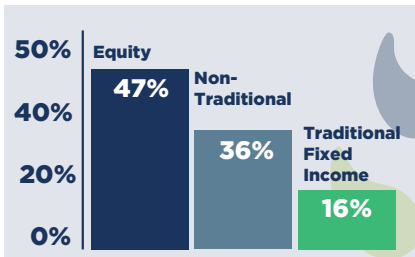
2022 Granting Locally and Across Canada



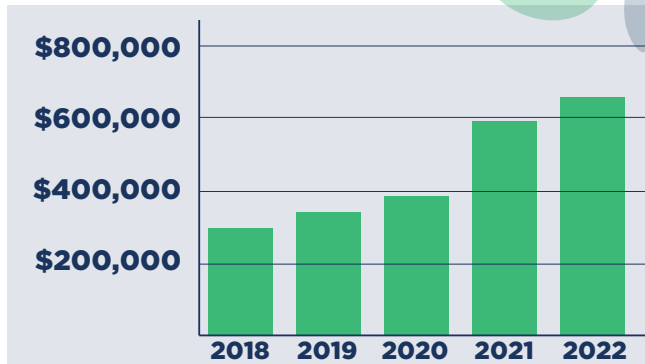
2022 Gross Rate of Return on Investments



Investment Pool Asset Mix as at December 31, 2022



Impact Investments as at December 31, 2022



Audit/Finance & Risk Committee

Vik Sachdev (Chair), Kevin Tremblay (Vice-Chair), Kirby Alguire, Rashpal Brar-Grewal, Christine Langevin, Frank Lochan*, Mark Lukowski*, Mike Miller, Grant Redpath**, Tom Rothfischer

Investment Committee

Mike Miller (Chair), Fred Pinto (Vice-Chair), Rob Budhwa*, Natalie Jamison, Gary Love, John Lydall, Lindsay Patrick

Impact Investment Committee

Ameeta Vijay (Chair), Mike Miller (Vice-Chair), Mira Backo-Shannon*, Rob Budhwa, Ronan Ryan**, Anusha Shanmugarajah**

* represents those serving until the May 2022 AGM

** represents those whose service began at the May 2022 AGM



Our Staff 2022

(Back row L-R) Saher Mirza, Michelle Collins, Courtney Waddell, Sarah McPherson, Alison Moeller, Taline McPhedran, Frances Pace
(Front row L-R) Dan Ierullo, Wendy Rinella, Lori Armitage, Michael Salem (Not Pictured) Gillian McLaren

Looking back at 2022.

The following stories are available in full on our website at:
www.theocf.org/2022-annual-report/

Winter



Community Classroom

Community Classroom launched for another year of new content, including two live stream performances by Susan Aglukark as well as a performance of Visions of Turtle Island. There were 19 interactive videos and an invitation to take part in the first ever Gimaa's Allyship Poetry Contest.

Community Education Awards Hub

Eight local students received nearly \$30k in scholarships, bursaries and educational awards through the Alexander and Bernice DeMaio Education Award and the Miller Family Foundation Bursary.



In 2022, The Awards Hub saw 870 students registered, an increase of 21% from 2021, to explore the 46 different awards. Over 560 applications were submitted with more than \$300,000 awarded by 11 different partners.



Debwewin: The Oakville Truth Project Launches

The launch of the Debwewin: The Oakville Truth project marked the start of a journey towards healing relationships, sharing truths, listening to the knowledge being shared and doing our part to redress past harms.

Enable Education

Together with Enable Education, The Foundation launched a new diversity, equity and inclusion online course to help reduce inequities in our community. This tool has been shared with more than 100 local organizations for use by their staff, board and volunteers.

Canada Healthy Communities Initiative

This federal granting program saw another \$2.39 million being distributed through the Golden Horseshoe Hub to transform public spaces in response to COVID-19.

Spring and Summer

Gimaa's Allyship Poetry Contest

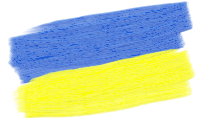
Following our Annual General Meeting, four students were recognized for their artistic achievement in Gimaa's Allyship Poetry Contest. The students performed their work during the Debwewin: The Truth of the Land performance.

Reconciliation, Equity, Anti-Racism Statement

In June, The Foundation released our Statement after a year of consultation. It was accompanied by a list of the work we have undertaken to represent our vision of A Community Where No One is Left Behind.

Grants to Support Ukraine

With the growing crisis in Ukraine, The Foundation encouraged donations to the Oakville Resettlement Fund. Later that year, The Foundation granted \$12,500 to support Ukrainian newcomers as they arrived in Canada and settled in Halton. An additional \$46,000 was granted through GIVEOakville.



#WeekendReads

On periodic Fridays throughout the year, The Foundation explored 2021 Census releases, specific to Oakville and Halton, looking at topics such as changing demographics, housing and shelter, racialized individuals and more.

Fall

Grateful Treaty Person and Acts of Allyship Campaign

Community members gathered at Sheridan College for The Debwewin Workshop to launch a campaign, marking Treaty Recognition Week. The campaign encouraged individuals and organizations to sign a commitment to Truth & Allyship and engage in acts of allyship to propel reconciliation forward across the community.



Women's Giving Collective

The Collective celebrated its fourth year during its annual Person's Day Event and the first year of a new multi-year grant agreement with the Halton Youth Collective to support youth transitioning out of care of the Halton Children's Aid Society.

View our Annual Report on our website by scanning the QR code or use the link below.

www.theocf.org/2022-annual-report/





Belonging and Racial Identity in Halton

Nearly two years before its publication, discussions began around building a community report to explore what could be done to better provide racialized members of the community with a greater sense of inclusion and belonging. Two videos were created by award-winning media production company Falling Motion to present the findings to students.

Highlights include:

- Most respondents felt there was a great need for better responses to mental health and better relationships between the police and the community
- There was a noticeable willingness by some respondents to accept that racism happens on a personal level but an unwillingness to recognize the existence of systemic racism
- The report was accompanied by responses and action plans by a number of community organizations impacts by the report recommendations

GIVEOakville

The Foundation was pleased to announce that GIVEOakville 2022 raised \$686,000 for local impact, thanks to community and Fundholder support. The campaign saw a record number 68 charitable projects seeking support. Among them, 12 received full funding.



20+ Year Funds

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

Barbara and Richard Birkett Fund

Bruce & Karen Etherington Fund

Pangman Family Fund

Sam and Margaret McGowan Charitable Trust for Guide Dogs Fund

Tom and Janet Alton Family Fund

In Memoriam

As we look back on the past year, we would like to take this opportunity to recognize and honour the following individuals who, as Fundholders, Friends and Volunteers, we have lost in 2022.

Margaret Anderson

Mary Coote

Joyce Gittings

Chuck Havill

Eileen Leaver

Marilyn Stemman

Adrian Coote Volunteer Award

The Adrian Coote Volunteer Award recognizes a volunteer who has given extraordinary services to the Oakville Community Foundation.

Peter Willis

Nick Jelinek

Mags Shorey

Chuck Havill





Board of Directors

Bindu Cudjoe (Chair), Brian Hanna (Past-Chair), Mike Miller (Vice-Chair), Ameeta Vijay (Secretary), Vik Sachdev (Treasurer), Mira Backo-Shannon*, Rob Budhwa, Binu Dhas**, Daniela Hampton-Davies*, Bonnie Jackson, Mary Lui*, Lindsay Patrick**, Fred Pinto, Kevin Tremblay, Andrew Tyrrell

Community Legacy Building Committee

Bonnie Jackson (Chair), Andrew Tyrrell (Vice-Chair), Andy Aiklen**, Sharmila Ali**, Bindu Cudjoe, Binu Dhas, Michael Gesualdi, Daniela Hampton-Davies*, Mary Lui*, Martha Hill*, Pankaj Mehra**, Susan Mollenhauer*, Les Ross

Governance & Nominating Committee

Rob Budhwa (Chair), Ameeta Vijay (Vice-Chair), Mira Backo-Shannon*, Bindu Cudjoe, Brian Hanna, Mike Miller

Canadian Philanthropy Commitment on Climate Change Subcommittee

Fred Pinto (Chair), Lisa Kohler, Mike Miller, Lindsay Patrick, Ameeta Vijay

* represents those serving until the May 2022 AGM

** represents those whose service began at the May 2022 AGM

Review Committees

Fund for Gender Equality

Megan Badenhorst, Samantha Cheung, Hailey Francis, Lois Thomas

Alexander and Bernice DeMaio Education Award

Binu Dhas

Kathryn Hughes

Audit Committee, Finance & Risk, Investment Committee and Impact Investment Committees are located with the financial data.

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