



Anyone can build a legacy!

**2009 REPORT TO THE COMMUNITY**

# The Guelph Community Foundation

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## WHO WE ARE AND WHAT WE DO

The Guelph Community Foundation is an independent, volunteer-driven charitable foundation whose purpose is to provide leadership in promoting community philanthropy and to enhance the quality of life for the citizens of Guelph and Wellington County.

### DONOR ENGAGEMENT

We work with donors and help them plan and realize their philanthropic goals, matching their interests and concerns with community needs and organizations. We help them find innovative and responsible ways to give their investments lasting impact. We build endowments and create legacies.

### GRANTING

We grant funds to the widest possible range of organizations and initiatives. Whether it's sending hundreds of children to camp, planting trees, awarding youth for academic achievement, or supporting a program for young parents, the Guelph Community Foundation is here to help good people do great things in our community.

### LEADERSHIP

We bring people together from all parts of our community to stimulate new ideas, build participation, and strengthen community philanthropy. We identify long-term needs and opportunities.



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# HELPING YOU MAKE A LASTING DIFFERENCE

## A MESSAGE FROM OUR EXECUTIVE DIRECTOR

As I write this message, we are mourning the death of the Chairperson of our Board, Hugh Guthrie. Both in his legal profession and privately, Hugh lived a life full of integrity, energy, humour, generosity and caring. A founding member of the Guelph Community Foundation, Hugh graced our Board with ten years of service, wisdom and vast experience. Hugh's legacy will continue to be forever enriched by annual grants from the *Hugh and Lorna Guthrie Fund*. With heavy hearts, we say thank you Hugh, for helping to set the vision for The Foundation and for what our community can be when good people do great things. Your impact will never be forgotten.

Fortunately our Board is deep with talent and Vice-Chair, Jay Elinesky has assumed the Chair's role. A past recipient of Guelph's *Top 40 Under 40* business leaders, Jay brings financial acumen and an already established legacy of philanthropy through the Foundation and beyond.

In the past year when charitable organizations and funding bodies alike were dealing with economic uncertainty and increased demands, it was gratifying to see our caring community come through. In 2009 we were able to grant over \$260,000 in three ways: we utilized a contingency reserve fund, we received a significant gift from an anonymous donor, and we facilitated additional flow-through gifts from generous fund holders. Combined, these contributions helped to stretch granting at a time it was needed most.

In 2009, ten new funds were established. The Foundation is now home to 100 funds from individuals and organizations who share the belief of planting a seed today to provide shade for future generations. These funds comprise a pool of \$6.7 million that have been received over the years as gifts of cash, securities, life insurance, RRSPs, and bequests by will. By thoughtfully managing the funds entrusted to us, we will be able to transform gifts into grants for now and forever.

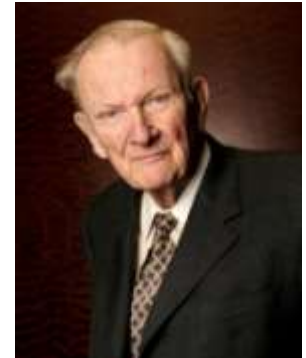
The Foundation's investments have begun to recover and prudent investment practices have returned better than average market results despite the roller coaster markets of the past few years. With this recovery, our grant making ability is once again more robust: spring grants for 2010 are almost double what they were for 2009. The good work undertaken by our local charitable sector and community agencies ultimately benefits us all.

In closing, I would like to thank all our donors, of every capacity, for it is your generosity that is helping to build a more vital and caring community.

Sincerely,



Andrea Olson, M.Ed., CRFE  
Executive Director  
The Guelph Community Foundation



*The late Hugh Guthrie, Past Chair*



*Jay Elinesky, Incoming Chair*



*Andrea Olson, Executive Director*

# IMPACT AND GROWTH 2009

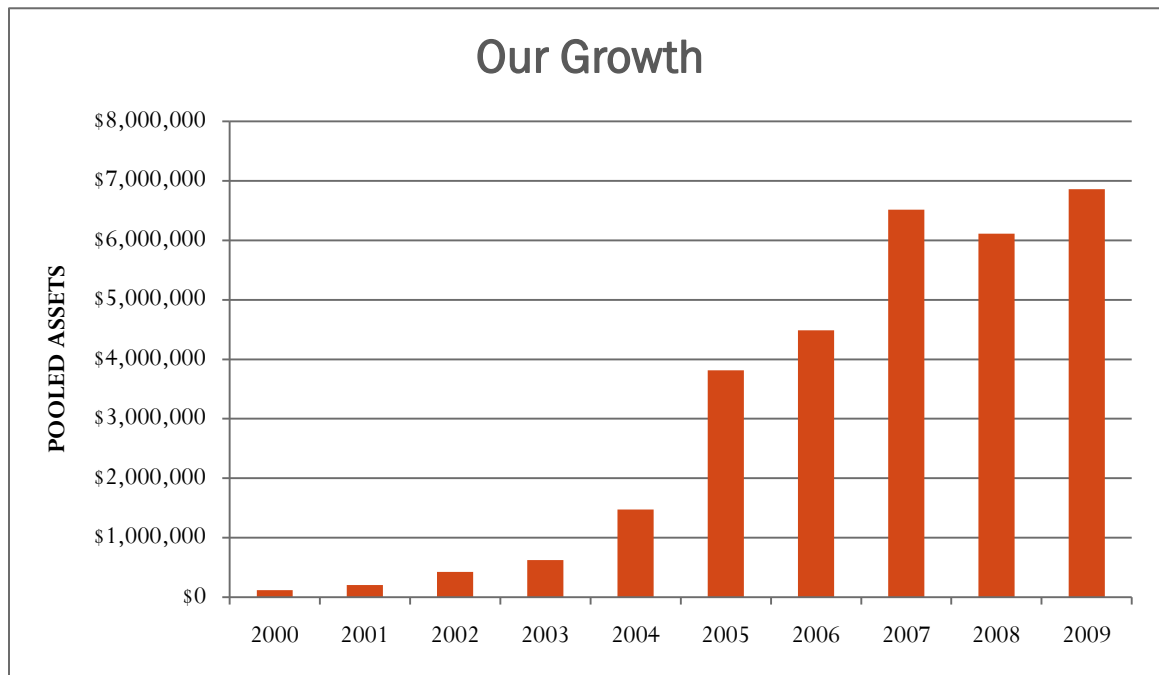
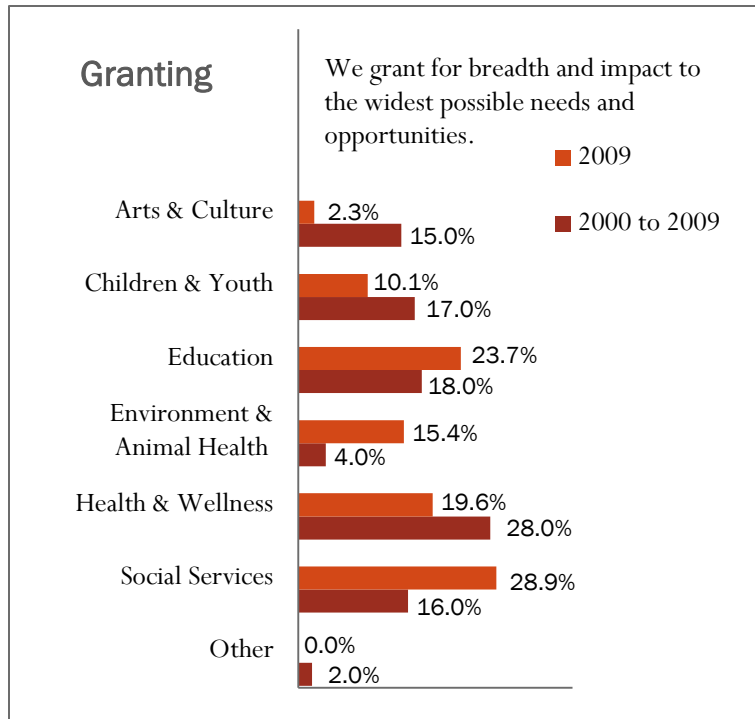
## MEETING COMMUNITY NEEDS

### 2009 HIGHLIGHTS . . .

- ✓ Endowed and non-endowed assets: \$7.1 million
- ✓ Growth: over \$400,000 in donations
- ✓ Grants: 81 grants totaling over \$260,000
- ✓ Funds: 10 new funds

### SINCE WE BEGAN IN 2000 . . .

- ✓ We have grown our capital pooled assets from \$117,250 to \$6.7 million
- ✓ We have established 100 funds that support the charitable sector
- ✓ We have distributed over \$1.5 million to over 460 charitable initiatives



Pooled assets include the fair market value of endowed and managed funds.  
Flow-through assets are not included in the above asset pool.

# GRANT STORIES

## BUILDING VITAL COMMUNITIES

Each year, the Guelph Community Foundation invites requests for funding from charitable organizations within Guelph and Wellington County. Charitable organizations deliver the services and champion the causes that make our community thrive. Whether it is recreation opportunities for children, meals for the hungry, end of life care, or culture for the soul, our not-for-profit sector makes it all happen. The Foundation has funded projects and initiatives that help to strengthen the development of a vital and healthy community.

Guelph and Wellington's Vital Signs, a report card produced by the Foundation, helps to better inform our granting through its indicator data. The report has indicated where our community is doing well and where improvement is needed. The priority issues that have emerged are the growing gap between the rich and poor and the high unemployment rate affecting our community. Families who experience challenges associated with poverty contend with many issues including food security, lack of affordable housing and income instability. In 2009, the Foundation committed to a program called Building Vital Communities which focused its granting on poverty reduction, prevention and alleviation.

### The Food Project

A \$32,400 grant from the Guelph Community Foundation allowed Family and Children Services of Guelph & Wellington County to fund part-time coordinators to work with six unique neighbourhood groups where hunger and food security are pressing issues. The neighbourhood groups of Brant, Waverly, Two Rivers, Parkwood Gardens, West Willow Woods, and Grange Hill East were able to establish partnerships and support volunteers to work together to ensure that more people with few resources had access to healthy food.



The Food Project has increased the effectiveness of each neighbourhood group's food cupboard, organized food drives, secured land to plant community gardens, helped people access a Garden Fresh Box and initiated collective kitchens. *"The ability to have one person dedicated to this work for one day a week seems to have been the tipping point to getting this work the focus it needed"*, stated Daniel Moore, Executive Director of Family & Children and Services. The Waverly Neighbourhood Group's collective kitchen doubled the number of participants and even hosted a youth collective kitchen that proved to be fun and inspiring. Collective kitchens are places where a group of people select recipes, purchase groceries, share the food preparation/cooking and divide up economical and nutritious meals. Unrestricted community funds allow the Foundation the greatest flexibility to respond to initiatives like The Food Project – to provide healthy food for everyone.

### Living on Less Workshops

Living on Less workshops began as a pilot outreach project at St. James Apostle Church to help people struggling to 'live on less' maintain their dignity, self worth, health and good nutrition. Over 70 people came together to live a more simple life, cope with the attitude of poverty, thrive, and be positive. They found a community of people who shared their journey. Participants came with their questions and worries as they were counseled on budgeting, food and nutrition, employment strategies, housing and health. A \$1,200 grant from the Guelph Community Foundation supported the pilot program, and due to its success, additional workshops were then supported by the Poverty Elimination Task Force of Guelph. Small grants make a big difference: they allow organizations to test new ideas quickly and provide possible solutions to everyday problems.



# WELCOME TO OUR NEW FUND HOLDERS

## CREATING A LASTING LEGACY

### Dr. Glenn D. Peirson Fund for the Arts

Glenn was a fan of writer and philosopher Soren Kierkegaard who said, “*Life can only be understood backwards; but it must be lived forwards*”. A few of Glenn’s favourite things included Bach, the Beatles, Elton John (the early years), blueberries, the Grey Cup, Christmas, MAC computers, and Guelph. Dr. Peirson led an inspirational life – through his medical practice, his music, his poetry, his community involvement and volunteerism, his athleticism and love of sports, and mostly, his love of family. Glenn had a wonderfully keen sense of humor and he loved to tease and bother his wife and two children as much as possible. After a three year battle with cancer, at the age of 44, Dr. Glenn Peirson passed away on November 10, 2009.



*Peirson Family Photo: The late Glenn Peirson with wife Dr. Mary Peirson and children Theodora and Henry.*

“I come from a family with a very strong tradition of service to the community,” says Mary. “My father, Jim Beingessner, is an extraordinary volunteer and always says, ‘*To whom more has been given, more is expected*’. He is my role model for exceptional citizenship and volunteerism and he helped me establish this fund in Glenn’s honour”. The Dr. Glenn D. Peirson Fund for the Arts is a donor advised fund that supports musical arts organizations with emphasis on choral music and singing for children.

Glenn’s legacy and love for music will support and inspire many musicians and singers in the years to come. The first award was granted to the Guelph Youth Singers in spring 2010. Choral singing promotes not just physical health (*such as improved lung capacity, high energy, relieved asthma and better posture*) but offers emotional and spiritual benefits (*such as feelings of relaxation and confidence*). Choral singing is a highly disciplined and creative team activity and harmonizing with others fills the heart with a renewed sense of promise and optimism.

### Welcome to our New Fund Holders

We would like to recognize and welcome our new funds established in 2009.

#### Unrestricted funds supporting our community:

- BDO Community Support Fund
- Macquarie Private Wealth Fund
- Tom Bird and Jay Elinesky Fund
- RLB LLP Community Fund

#### Funds supporting specific causes and organizations:

- Bruce Trail Conservancy Fund – *supporting the Bruce Trail as part of the Ontario Land Trust Association partnership*
- Cedarcliff Fund – *supporting arts and culture*
- Centre Wellington Community Foundation – *supporting Centre Wellington*
- Mike Elrick Moves Us Legacy Fund – *supporting various charitable causes with emphasis on the environment*
- Dr. Glenn D. Peirson Fund for the Arts – *supporting musical arts*
- Trellis Mental Health & Development Services Endowment Fund – *supporting the Trellis organization*



*Photo above: A grant from the Guelph Community Foundation’s unrestricted funds allowed the Julien Project to engage young children at risk to learn how to grow, maintain and harvest organic vegetables and make healthy food choices.*

# 2009 GRANTS

OVER \$260,000 IN DISBURSEMENTS IN TWO WAYS: THROUGH OUR OWN GRANTING PROGRAMS  
OR AS DONOR ADVISED, DESIGNATED AND FLOW-THROUGH FUNDS.

## ARTS & CULTURE

Guelph Arts Council	\$ 500.00	Guelph Arts Council Youth Endowment Fund
Guelph Arts Council - <i>Artists Relief Fund</i>	\$ 1,000.00	Anonymous
River Run Centre	\$ 500.00	Anonymous
Spark of Brilliance	\$ 1,000.00	Anonymous
Spark of Brilliance - <i>KidZCreate Program</i>	\$ 2,500.00	Musagetes Fund
Stratford Shakespearean Festival of Canada	\$ 500.00	Anonymous

## CHILDREN & YOUTH

Big Brothers Big Sisters of Guelph	\$ 500.00	Anonymous
City of Guelph	\$ 842.46	Nicholas Lambden Memorial Children's Foundation Fund
City of Guelph - <i>Brant Avenue Neighbourhood Group</i>	\$ 2,000.00	Anonymous
Guelph Giants Special Hockey Foundation	\$ 1,500.00	Ray Scapinello Foundation Fund
Guelph Minor Hockey	\$ 265.25	Creмасco Fund
Onward Willow BBBF - <i>Teen Program</i>	\$ 1,500.00	Anonymous
Rainbow Programmes for Children	\$ 4,500.00	Creмасco Fund
Sick Kids Foundation - <i>World Transplant Games</i>	\$ 1,500.00	Ray Scapinello Foundation Fund
Belwood Lodge and Camp	\$ 4,000.00	<p>These grants supported children's summer camp through a group of funds within the Foundation:</p> <ul style="list-style-type: none"> <li>~Guelph Mercury Kids-to-Camp Fund</li> <li>~Prime Restaurants Kids for Sports Fund</li> <li>~Guelph Community Foundation Community Fund</li> <li>~An anonymous fund</li> </ul>
Canadian Diabetes Association	\$ 1,350.00	
Community Resource Centre of North & Centre Wellington	\$ 1,157.83	
Elora Centre for the Arts	\$ 1,000.00	
Great Big Theatre	\$ 215.00	
Guelph Contemporary Dance Festival	\$ 685.00	
Guelph Neighbourhood Support Coalition	\$ 2,000.00	
Guelph Youth Music Centre	\$ 2,205.00	
YMCA-YWCA Guelph	\$ 1,500.00	

## EDUCATION

Bishop Macdonell CHS; Our Lady of Lourdes CHS; St. James CHS	\$ 900.00	Angelo & Rina Longo Fund
Bishop Macdonell CHS; Our Lady of Lourdes CHS; St. James CHS	\$ 3,000.00	Ray Scapinello Foundation Fund
Capilano University; Ontario College of Art & Design; McGill University; McMaster University; Mount Royal College; Trent University; University of Western Ontario	\$ 2,899.96	Laurie Nicholl Education Fund
Conestoga College	\$ 1,000.00	175th Scholarship Fund
Ignatius Jesuit Centre - <i>Student Retreat Centre</i>	\$ 40,960.58	Bishop's Education Fund (WCDSB)
Sheridan College	\$ 1,000.00	Terry Doyle Scholarship Fund
University of Guelph	\$ 2,000.00	175th Scholarship Fund
University of Guelph	\$ 500.00	Dr. Harry Downie Memorial Fund
University of Guelph	\$ 5,250.00	OMS Graduate Scholarship in Industrial Organizational Psychology Fund
Upper Grand Learning Foundation	\$ 4,000.00	Ray Scapinello Foundation Fund
Upper Grand Learning Foundation - <i>Centennial CVI</i>	\$ 500.00	Class of '71 Award in Memory of Kathryn Winegard Fund
Upper Grand Learning Foundation - <i>College Heights HS</i>	\$ 200.00	Kimberly Thompson Memorial Fund
Volunteer Centre of Guelph Wellington - <i>Board Diversity Workshop</i>	\$ 500.00	Dr. Jagjit S. Gadhoke Volunteer Development and Training Fund

# 2009 GRANTS CONTINUED

## CONNECTING DONORS WHO CARE WITH CAUSES THAT MATTER

### ENVIRONMENT & ANIMAL WELFARE

Bruce Trail Association	\$ 1,000.00	Anonymous
Grand River Conservation Foundation	\$ 12,000.00	Nicholas Lambden Memorial Children's Foundation Fund
Guelph Community Foundation - <i>Bruce Trail Conservancy Fund</i>	\$ 20,000.00	Anonymous
Nature Conservancy of Canada	\$ 3,000.00	Anonymous
Trees for Guelph	\$ 100.00	GCF Community Fund
Guelph Humane Society	\$ 500.00	Anonymous
Guelph Humane Society	\$ 4,000.00	William & Leslie Mactaggart Fund

### HEALTH & WELLNESS

Guelph General Hospital Foundation	\$ 500.00	Anonymous
Hospice Wellington	\$ 28,817.49	Anonymous
Canadian Red Cross (Puslinch)	\$ 100.00	GCF Community Fund
Guelph General Hospital Foundation	\$ 4,500.00	Janet Borg Memorial Foundation Fund
Heart & Stoke Foundation of Ontario	\$ 250.00	William & Leslie Mactaggart Fund
Hospice Wellington	\$ 10,000.00	William & Leslie Mactaggart Fund
Hospice Wellington	\$ 100.00	GCF Community Fund
Hospice Wellington - <i>Children's Bereavement Program</i>	\$ 5,589.00	Janet Borg Memorial Foundation Fund
Trellis Mental Health & Development Services	\$ 2,000.00	June McCann Fund

### SOCIAL SERVICES

Centre Wellington Food Bank	\$ 1,500.00	Anonymous
Chalmers Community Services Centre - <i>Food Cupboard</i>	\$ 500.00	Anonymous
City of Guelph - <i>Civic Square Project</i>	\$ 4,853.33	Anonymous
Guelph Wellington Women in Crisis	\$ 200.00	Anonymous
Medicins Sans Frontieres	\$ 2,000.00	Anonymous
Oxfam Canada	\$ 1,000.00	Anonymous
Tikinagan Child & Family Services	\$ 2,000.00	Anonymous
Unicef Canada - <i>'Spread the Net' for John F. Ross</i>	\$ 1,000.00	Ray Scapinello Foundation Fund
United Way of Guelph Wellington	\$ 5,000.00	Anonymous
United Way of Guelph Wellington	\$ 1,000.00	William & Leslie Mactaggart Fund
USC Canada	\$ 500.00	Anonymous
Wyndham House	\$ 5,000.00	RBC Foundation
Abbeyfield Houses Society of Guelph - <i>Meal Program</i>	\$ 3,400.00	These grants supported our Building Vital Communities program through the Norman Earl Webb Fund and an anonymous fund.
AIDS Committee of Guelph & Wellington County - <i>Borrow, Deposit, Grow Program</i>	\$ 3,500.00	
Community Resource Centre of North & Centre Wellington - <i>Emergency Food Cupboard</i>	\$ 2,500.00	
Family & Children's Services of Guelph and Wellington County - <i>The Food Project</i> in partnership with <i>Waverly, Brant, Grant Hill East, Parkwood Gardens, West Willow and Two Rivers neighbourhood groups.</i>	\$ 32,400.00	
Michael House Pregnancy Care Centre - <i>Drop-In Program</i>	\$ 2,000.00	
The Church of St. James the Apostle - <i>Living on Less Workshop</i>	\$ 1,200.00	
The Julien Project - <i>Field Organic Vegetable Production Program</i>	\$ 5,000.00	



# OUR FUNDS

## SIMPLE, POWERFUL AND PERSONAL APPROACH TO GIVING

### Unrestricted Funds

Unrestricted funds provide us with the most flexibility in responding to community needs. Named funds can be established with a gift of \$10,000 or emerging funds can be created with pledge commitments. *Donors interested in supporting future community needs are able to make a contribution of any size to our GCF Community Fund.*

- BDO Community Support Fund
- Bonnie Ewen Fund
- Clare & Shirley Rennie Family Fund for Literacy
- GCF Community Fund
- GCF Operating Sustainability Fund
- Macquarie Private Wealth Fund
- Meridian Credit Union Fund
- Norman Earl Webb Fund
- RLB LLP Community Fund
- The Co-operators Fund
- Tom Bird and Jay Elinesky Fund
- William K. Greenaway & Anne C. Bawden Fund

### Field of Interest Funds

A field of interest fund enables donors to identify an area of interest they would like to support (i.e. children, animal welfare, arts, environment, education, etc.).

- Andy Lindsay Memorial Scholarship Fund
- Camp Discover Fund
- GCF Children & Youth Fund
- GCF Environmental Legacy Fund
- Jamie Vickery Memorial Fund
- William Darragh Gastle Endowment Fund

### Donor Advised Funds

Donor advised funds allow donors to have ongoing participation in the selection of charities that will benefit from their gift.

- Ages Foundation Fund
- Cremasco Fund
- Dr. Glenn D. Peirson Fund for the Arts
- Dr. Griffith A.V. Morgan Fund
- Kathie Deters Young Performers Fund
- Ken Danby Legacy Fund
- Koornstra Family Foundation Fund
- Hugh and Lorna Guthrie Fund
- Masquerade Fund
- Musagetes Fund
- Norman Earl Webb Fund
- Paul J. Smith Memorial Fund
- William & Leslie Mactaggart Fund
- William D. Packham Fund

### Designated Funds

This type of fund allows donors the opportunity to specify (at the time the fund is established) the charitable organization they wish to support in perpetuity.

- 175th Scholarship Fund
- Angelo and Rina Longo Fund
- Anne Hohenadel Fund
- Bruce Graham Memorial Fund
- Class of '71 Award in Memory of Kathryn Winegard Fund
- Dr. Charles Pinch Fund
- Dr. Harry Downie Memorial Fund
- Guelph Chamber of Commerce Millennium Scholarship Fund
- John A. Hourigan Memorial Fund
- Ken Boyd Fund
- Ken Hammill Operating Endowment Fund
- Kiera Schneider Memorial Fund
- Kimberly Thompson Memorial Fund
- Nan Hogg Fund
- Norval & Mary K. Richards Fund
- OMS Graduate Scholarship in Industrial-Organizational Psychology Fund
- Terry Doyle Scholarship Fund
- Thelma Townsend Fund
- Tom Incedon Memorial Award Fund
- Valcom Employee Guelph Health Centres Benefit Fund
- Wynne Townsend Christie Fund

### Flow-through Funds

Flow-through funds are distributed over a specific period of time.

- Cuten Club Fund
- Dr. Jagjit S. Gadhoke Volunteer Development & Training Fund
- Fathers Remembered by Daughters Fund
- Guelph Mercury Kids-to-Camp Fund
- Italian Canadian Club Fund
- Janet Borg Memorial Foundation Fund
- Kimberley Walker Fund
- Laurie Nicholl Education Fund
- Mike Moves Us Legacy Fund
- Nicholas Lambden Memorial Children's Foundation Fund
- Prime Restaurants Kids for Sports Fund
- Ray Scapinello Foundation Fund

### Charitable Endowment Funds

Charitable organizations establish permanent endowment funds to provide a source of income to carry out their work.

- AIDS Committee of Guelph & Wellington County Endowment Fund
- Bruce Trail Conservancy Fund
- Children's Foundation of Guelph & Wellington Fund
- Gary Zuber-Onward Willow Endowment Fund
- Guelph Arts Council Jane Graham Memorial Fund
- Guelph Arts Council Youth Endowment Fund
- Guelph Community Health Centre Endowment Fund
- Guelph Museums Fund
- Hillside Festival Endowment Fund
- Hopewell Children's Homes Fund
- Hospice Wellington Fund
- June McCann Fund
- KidsAbility Fund
- River Run Centre Endowment Fund for the Performing Arts
- Trellis Mental Health & Development Services Endowment Fund
- United Way of Guelph & Wellington 'Tomorrow Fund'
- Zonta Club of Guelph Endowment Fund

### Funds Held for Others

These funds have been placed with the Foundation for long term investment by other charitable organizations.

- Bishop's Education Fund/ WCDSB
- Cedarcliff Fund
- Centre Wellington Community Foundation
- Friends of the Public Library Fund
- Guelph Community Health Centre Managed Fund
- Guelph Girls Fastpitch Championship Fund
- Ontario 4-H Foundation Endowment Fund
- Ontario Dairy Youth Trust Fund
- Upper Grand Learning Foundation Fund

# SUPPORTING OUR WORK

TODAY . TOMORROW . FOREVER

A community foundation is a collection of charitable funds established by people from all walks of life who have one thing in common – the desire to make a difference in their community. Donations to endowment funds are pooled together and invested. The income from these investments is then used to make grants to support local registered charities, while the capital remains untouched. This means your original gift will have impact in the community today, tomorrow, and forever.

## How to start a fund

The first thing to consider when establishing a fund with us is whether you would like to start a fund now or later.

### Starting a fund now

By creating your fund now, you have the opportunity to make your fund the centre of your charitable efforts. It is about making a difference by consciously choosing how much to give, when to give, and for what purpose. Or you may choose to donate to our GCF Community Fund and pool your money with others to address community needs.

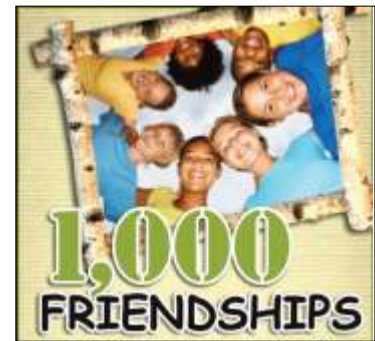
Funds can be established through gifts of cash, life insurance and publicly traded securities. By donating stock, you can receive preferential tax treatment and you avoid the capital gains that would otherwise arise from the sale of the stock.

### Starting a fund later

The Guelph Community Foundation offers opportunities to make a future gift. We can work with you and/or your advisor to ensure the permanent endowment created at the time of your passing reflects your wishes for giving in the community. Whether it is selecting the Guelph Community Foundation to be a beneficiary in your will, life insurance policy, RRSPs or RRIFs, we can provide a way for you to give back to the community you care about.

### Why do people choose to give to community foundations?

- **We offer simplicity.** We take care of all your giving needs with time and cost efficient solutions.
- **We offer flexibility.** You can create and name a fund that meets your needs and helps you invest in the causes you care about most.
- **We offer a broad perspective.** You have access to knowledge about the widest range of community needs and opportunities.
- **We offer anonymity.** You can be recognized for your gift or remain anonymous. The choice is yours.
- **We offer impact.** You can multiply the impact of your gift by pooling it with other gifts and grants.
- **We offer permanence.** You can create a timeless legacy that will benefit *your* community in perpetuity.



*Since 2001, the Guelph Mercury Kids-to-Camp Fund has granted over \$85,000 to provide hundreds of kids the experience of summer camp.*



*Photo: The Guelph Giants Special Hockey Foundation 2009-2010, supported by a grant from the Ray Scapinello Foundation Fund. The Giants are a special needs hockey club for intellectually disabled athletes.*

*“We are so fortunate to have a dedicated group of volunteers who have created an environment that is compassionate and nurturing with emphasis on having fun. The benefits to our son are numerous, but two of the more important ones are: the health benefits of physical exercise (which has helped develop his gross motor and cognitive skills) and the non-judgmental socialization with his peers at practices, games and team activities”.*

*~ Anne & John, parents of Giants athlete ~*

# OUR DONORS

## HELPING GOOD PEOPLE DO GREAT THINGS

We would like to thank and acknowledge each and every donor who gave so generously in 2009. Our donors are the life blood of what we do. The charitable organizations we work with appreciate every donation whether it is large or small. Today's donors are a diverse group of people, passionate about making change at whatever level they can. Whether it be through their first small donation to our Community Fund, the establishment of a donor advised fund, or a planned estate gift for the future, our donors care about the community we live in and strive to leave it a better place for generations to come.

### Thank you to all donors for your gift in memory of:

Mike Elrick - Mikes Moves Us Legacy Fund  
Glenn Peirson - Dr. Glenn Peirson Fund for the Arts

### Thank you to all those who provided support for the following funds:

Bishop's Education Fund (WCDSB)  
Fathers Remembered by Daughters Fund  
Janet Borg Memorial Foundation Fund  
Ray Scapinello Foundation Fund  
Tom Incledon Memorial Fund

### Thank you to our special ENGAGE partners for operational support:

BDO Canada LLP  
Tom Bird and Jay Elinesky of RBC Dominion Securities  
Macquarie Private Wealth  
RLP LLP

### Founders Circle

As we approach our 10<sup>th</sup> year we would like to acknowledge the people and organizations, our 1<sup>st</sup> donors, who launched the Guelph Community Foundation.

Dr. C.A.V. & Jean Barker  
Robert & Pamela Berry  
Dr. James Britton  
Gary & Wynne Christie  
City of Guelph  
Dean & Hilary Coates  
The Co-operators  
County of Wellington  
Pauline & Bob Curtis  
Douglas C. Dodds  
ESG International  
Grandi Company Limited  
William K. Greenaway & Anne C. Bawden

Goldie's Mill Neighbourhood Association  
Philip & Jean Gosling  
Guelph Chamber of Commerce  
Guelph Tool Inc.  
Hugh Guthrie  
Ken & Eileen Hammill  
Hammond Power Solutions  
Imperial Tobacco  
Cindy & Jim Lindsay  
Angelo & Rina Longo  
Earl & Jean MacNaughton  
William & Leslie Mactaggart  
J. David McAuley Architect Inc.

Patricia & Bruce McCraw  
Miller Thomson LLP  
Charles M.W. Ormston  
RBC Foundation  
Dr. & Mrs. J.C. Rennie  
Robinson & Company LLP  
Rotary Club of Guelph – Trillium  
Sleeman Brewing & Malting Co.  
Smith Valeriote  
Valcom Limited  
Charles & Margaret Whittaker  
Dr. & Mrs. Wm. Winegard  
W.C. Wood Company Ltd.  
Zonta Club of Guelph



*Photo: Students participating in the building of the Student Retreat Centre & Chapel at the Ignatius Jesuit Centre. Since 2003 the Bishops Education Fund has collected over \$180,000 from its annual dinner event to support Catholic education.*

**For more information about establishing an endowed fund, charitable bequests, grants or donating gifts of shares, contact our office: (519)821-9216 or [guelphcf@bellnet.ca](mailto:guelphcf@bellnet.ca).**

# FINANCIAL HIGHLIGHTS

TRUST . VISION. ACCOUNTABILITY

<b>THE GUELPH COMMUNITY FOUNDATION</b>					
<b>STATEMENT OF FINANCIAL POSITION</b>					
<b>AS AT DECEMBER 31, 2009</b>					
	Operating Fund	Endowed Fund	Non-Endowed Fund	2009	2008
<b>ASSETS</b>					
<b>CURRENT</b>					
Cash	\$ 46,328	\$ 77,281	\$ 108,981	\$ 232,590	\$ 397,136
Grants receivable	0	0	0	0	21,500
GST recoverable	2,178	2,805	0	4,983	3,290
Accounts receivable	0	0	423	423	0
Interfund loans (note 2)	(31,040)	10,130	20,910	0	0
	17,466	90,216	130,314	237,996	421,926
<b>INVESTMENTS (note 4)</b>	0	5,021,169	200,280	5,221,449	4,424,806
<b>FUNDS HELD FOR OTHERS (note 5)</b>	0	1,773,138	0	1,773,138	1,608,493
<b>CAPITAL (note 3)</b>	666	0	0	666	0
	<u>\$ 18,132</u>	<u>\$ 6,884,523</u>	<u>\$ 330,594</u>	<u>\$ 7,233,249</u>	<u>\$ 6,455,225</u>
<b>LIABILITIES</b>					
<b>CURRENT</b>					
Accounts payable and accrued liabilities	\$ 5,605	\$ 14,300	\$ 10,000	\$ 29,905	\$ 7,740
<b>FUNDS HELD FOR OTHERS (note 5)</b>	0	1,773,138	0	1,773,138	1,608,493
	<u>5,605</u>	<u>1,787,438</u>	<u>10,000</u>	<u>1,803,043</u>	<u>1,616,233</u>
<b>NET ASSETS</b>					
<b>EXTERNALLY RESTRICTED (note 7)</b>	0	5,097,085	320,594	5,417,679	4,815,537
<b>UNRESTRICTED</b>	12,527	0	0	12,527	23,455
	<u>12,527</u>	<u>5,097,085</u>	<u>320,594</u>	<u>5,430,206</u>	<u>4,838,992</u>
	<u>\$ 18,132</u>	<u>\$ 6,884,523</u>	<u>\$ 330,594</u>	<u>\$ 7,233,249</u>	<u>\$ 6,455,225</u>

<b>THE GUELPH COMMUNITY FOUNDATION</b>					
<b>STATEMENT OF OPERATIONS AND CHANGES IN NET ASSETS</b>					
<b>FOR THE YEAR ENDED DECEMBER 31, 2009</b>					
	Operating Fund	Endowed Fund	Non-Endowed Fund	2009	2008
<b>REVENUE</b>					
Donations	\$ 34,516	\$ 93,851	\$ 170,450	\$ 298,816	\$ 687,550
Grants	25,300	0	0	25,300	68,410
Fundraising income	14,694	0	0	14,694	0
Investment and dividends	8,724	127,672	0	136,397	172,472
Realized (loss) gain on sale of investments	13	(63,280)	0	(63,267)	(10,081)
	83,247	158,243	170,450	411,940	918,351
<b>GRANTS</b>	0	56,950	163,568	220,518	232,879
	<u>83,247</u>	<u>101,293</u>	<u>6,882</u>	<u>191,422</u>	<u>685,472</u>
<b>EXPENDITURES</b>					
Amortization	333	0	0	333	221
Bank charges and interest	83	0	0	83	155
Fundraising	9,355	0	0	9,355	0
Insurance	2,137	1,210	0	3,347	3,002
Office	8,394	0	0	8,394	32,546
Printing and marketing	15,099	0	0	15,099	14,017
Professional and investment management fees	29,255	37,847	0	67,102	67,320
Professional development and travel	779	0	0	779	4,108
Rent	7,723	0	0	7,723	6,206
Repairs and maintenance	820	0	0	820	727
Salaries	81,606	0	0	81,606	75,246
Vital Signs project	25,734	0	0	25,734	54,935
Administration fee	(87,322)	69,757	3,420	(14,145)	(15,263)
	93,996	108,814	3,420	206,230	243,218
<b>(DEFICIENCY) EXCESS OF REVENUE OVER EXPENDITURES BEFORE THE FOLLOWING</b>	(10,749)	(7,521)	3,462	(14,808)	442,254
<b>UNREALIZED APPRECIATION (DEPRECIATION) OF INVESTMENTS</b>	(179)	606,201	0	606,022	(689,558)
<b>EXCESS (DEFICIENCY) OF REVENUE OVER EXPENDITURES</b>	(10,928)	598,680	3,462	591,214	(247,304)
<b>NET ASSETS, beginning of year</b>	23,455	4,502,118	313,419	4,838,992	5,086,296
<b>INTERFUND TRANSFERS (note B)</b>	0	(3,713)	3,713	0	0
<b>NET ASSETS, end of year</b>	<u>\$ 12,527</u>	<u>\$ 5,097,085</u>	<u>\$ 320,594</u>	<u>\$ 5,430,206</u>	<u>\$ 4,838,992</u>

The summarized financial information represents highlights of our financial year and was extracted from the audited financial statements of the Guelph Community Foundation. The firm of RLB LLP performed the audit. The Foundation is committed to complete financial accountability and transparency. For a complete set of audited financial statements, visit our website at [www.guelphcf.ca](http://www.guelphcf.ca). If you would like a paper copy, please contact our office.

# STEWARDING YOUR INVESTMENT

## FROM GIFTS TO GRANTS

One of the ways community foundations remain future focused is to create and manage endowment (permanent) funds. The Guelph Community Foundation pools charitable gifts, large and small, from many donors and invests to create a never ending source of investment income. While the original gift is never spent, the investment income is distributed to a wide range of local charitable organizations in the form of grants. In this way the Foundation creates a perpetual legacy for generations to come and offers you options to permanently shape your community's future.

### Investments

In 2009, our returns rebounded to a 14.9% return, reflecting a strong performance by our investment managers, who outperformed the improving markets. Our performance on a seven year basis of 6.9% annualized surpasses the Morningstar Average Canadian benchmark of 6.7%. This out performance has been achieved with lower volatility consistent with the conservative strategy used to manage the Guelph Community Foundation's capital assets. Long term sustainability is what community foundations are all about and we will stay the course and not react to short term market fluctuations.

#### Annual Rate of Return

2009	14.9%
2008	-11.9%
2007	0.6%
2006	9.5%
2005	12.8%
2004	9.7%
2003	9.2%

#### Investment Philosophy

- ✓ Protect the capital of the fund
- ✓ Maintain income and growth at moderate levels of risk
- ✓ Achieve the granting objectives of the Foundation
- ✓ Recover the costs of managing and administering funds
- ✓ Use an investment style that focuses on long term growth
- ✓ Achieve annual returns with performance benchmarks

### A Note to Professional Advisors

Your clients may have both personal and financial reasons to explore the idea of philanthropy. Whether a donor wants to give during or after their lifetime, planning a gift through the Guelph Community Foundation ensures that their donation will help improve the community in perpetuity. By partnering with the Foundation, you may be able to help your clients achieve their philanthropic goals, create a legacy for the community and gain tax efficiencies. We work closely with local investment, financial and legal professionals

#### ✓ Professional advisor eResource

Visit our website for this free on-line tool kit that offers advisors practical and flexible tools for charitable giving. [www.guelphcf.ca](http://www.guelphcf.ca)

#### ✓ Gifts of securities

Individuals continue to gift stock and if your client is interested in donating securities contact our office and we can provide you with a *Securities Transfer Form*. We can work with donors to either 'flow it through' to their favourite registered charity, contribute to an existing fund, or establish a new endowment fund to create their own personal legacy.

#### ✓ Call us to book a special visit

We would be happy to come to your office and talk to you and your associates on how we can work together to support your clients.



*"We don't want to just live in a community. We want to support it, participate in it, and help to strengthen it. The permanent funds we created have significant meaning to our family".*

*~Gary & Wynne Christie,  
fund holders since 2004~*

*The Christies established the Thelma Townsend Fund in memory of Wynne's mother Thelma Townsend (supporting Guelph museums) and the Wynne Christie Townsend Fund (supporting Hospice Wellington).*

# LEADERSHIP

## BUILDING COMMUNITY IS OUR BUSINESS



We thank our talented volunteer board and committee members for their commitment and dedication. Without their expertise and support we would not be able to do all that we do.

The Guelph Community Foundation's Board of Directors is committed to representing our community's interests, setting direction, and monitoring the Foundations operations.

### Board of Directors - 2009

Hugh Guthrie, Chair	Dan Cremasco
Jay Elinesky, Vice Co-Chair	Pauline Curtis
Susan Brown, Vice Co-Chair	Chris Davison <i>(missing from photo)</i>
Hilary Coates, Treasurer	Peter Kastner
David Bruce <i>(missing from photo)</i>	Moragh Lippert

Pat McCraw *(missing from photo)*  
Dominique O'Rourke *(missing from photo)*  
Ella Pauls

### Foundation Staff

Andrea Olson, Executive Director  
Shawna Berry, Office Manager

**Honourary Founding Board Member:** Ken Hammill

### Investment Management & Finance Committee

Peter Kastner, Chair	Hugh Guthrie
Hilary Coates	Ken Hammill
Dan Cremasco	

### Grants Committee

Susan Brown, Chair	Loretta Dunn	Pat McCraw
Jane Armstrong	Moragh Lippert	Daniel McDonell
Gary Christie	Anne Mackay	

### Marketing and Communications Committee

Ella Pauls, Chair	Chris Davison	David Parr
Christy Carlyle	Jay Elinesky	James Reid
Pauline Curtis	Dominique O'Rourke	

### Professional Advisors Committee

Bob Berry, Chair	Jason Evans	Gary Stewart
Tom Bird	Ted Farley	
Darrell Cooney	Bill Koonstra	

### A Sincere Thank You

To Macquarie Private Wealth for investment management services.  
To Miller Thomson LLP for assisting with our legal needs.  
To RLB LLP for assisting with our auditing requirements.  
To Weiler & Company for accounting support.

### Partners in Community Vitality

The Guelph Community Foundation is a member of Community Foundations of Canada. There are 174 community foundations across the country and together we help Canadians invest in building strong and resilient places to live, work and play.

Community Foundations are one of Canada's largest grantmakers, and in 2009 they contributed more than \$140.6 million to thousands of charities. Collectively, donors invested \$193.6 million in their community through new gifts in 2009. Together, we hold more than \$2.85 billion in shared assets.



COMMUNITY  
FOUNDATIONS  
OF CANADA  
all for community.

# VITAL SIGNS

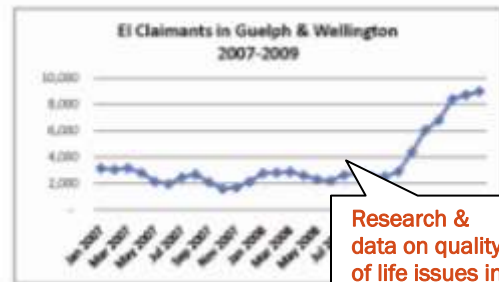
## TAKING THE PULSE OF OUR COMMUNITY

Guelph and Wellington's Vital Signs is a report card that measures the health of our community, identifies significant trends and assigns grades in areas critical to the quality of life. By taking the pulse of our community, we highlight both areas of concern and areas of celebration. The Vital Signs report informs us in our grant making, reveals issues and opportunities for donors and serves as a guidepost for a variety of community conversations and plans.

Areas of concern identified in the 2009 report:

- The gap between rich and poor continues to grow;
- Poverty is a concern as unemployment rates climb;
- People are at risk of homelessness in Guelph and Wellington and the wait for social housing has increased.

### What is inside our Vital Signs report:



To view the report, visit [www.guelphwellingtonvitalsigns.ca](http://www.guelphwellingtonvitalsigns.ca). The website hosts two years of data and previous reports.

### Thank you for supporting our Vital Signs project:

The Co-operators for financial support.  
The Guelph Mercury for assisting us with media support.  
The Ontario Trillium Foundation for financial assistance.

### Thank you to our Vital Signs Advisory Committee

Lynn Broughton, Guelph Downtown Business Association  
Ken Dardano, United Way of Guelph & Wellington  
Lynda Davenport, Wellington-Dufferin-Guelph Public Health  
Hugh Guthrie, Guelph Community Foundation  
Ken Hammill, Guelph Community Foundation  
Lawrence Kuk, City of Guelph  
Vern Lediett, Trellis Mental Health & Development Services  
Jane Londerville, Wellington & Guelph Housing Committee  
Daniel Moore, Family & Children's Services of Guelph & Wellington  
Paul Truex, Waterloo-Wellington Local Health Integration Network  
Brenda Whiteside, University of Guelph

THE ONTARIO  
TRILLIUM  
FOUNDATION



LA FONDATION  
TRILLIUM  
DE L'ONTARIO

# ANYONE CAN BUILD A LEGACY



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## **We've Gone Green!**

In an effort to be a better friend to our environment and to help reduce costs, a limited number of report copies have been printed on 100% recycled paper. If you would like to share this report with a friend, please download a copy from our website.