

Donors

Accumulated donations to August 31, 2005

Over \$100,000

B. J. (Bo) Sibold Estate

\$50,000 - \$100,000

The Ontario Trillium Foundation

\$25,000 - \$49,999

The Bickell Foundation
Alec and Mary "Sam" McTavish

\$10,000 - \$24,999

Bob and Mary McTavish
Lillian McTavish
The County of Perth
The City of Stratford

\$5,000 - \$9,999

Laura and Tom Tanner
Susan and Stuart McTavish

\$2,000 - \$4,999

Culliton Brothers
Ideal Supply
The Town of St. Marys

\$500 - \$1,999

Harry Brightwell
Wayne and Peggy Brightwell
Jeff Carruthers
Cavalier Equestrian
Tom Clifford
Tim MacDonald
Brenda Mitchell
Berny Nymeyer
Richard Smelski
William Somerville
Peter Van Drunen
Anne Walsh

Under \$500

Elizabeth Hachborn
Michael and Ernestine McKenna
Helen and Bert Merrill
Mornington Communications

Gifts-in-Kind

Festival Furniture
Ideal Supply
Anne-Marie Tymec/Mountain Mitchell LLP

Stratford and Perth County Community Foundation

Summarized Financial Statements Balance Sheet as of August 31, 2005

	2005	2004
Assets		
Cash	\$ 44,269	\$ 94,604
Accounts receivable	104	250,000
GST recoverable	740	268
Prepaid expenses	381	777
Investments	328,415	-
	\$ 373,909	\$ 345,649
Liabilities		
Accounts payable	1,027	4,232
Grants payable	2,500	-
	3,527	4,232
Fund Balances		
Operating fund	37,013	54,979
Endowment fund	321,783	286,438
Restricted fund	11,586	-
	370,382	341,417
	\$ 373,909	\$ 345,649

Statement of Operations for the year ended August 31, 2005

	2005	2004
Revenue		
Donations	40,580	43,336
County and Municipality grants	17,000	-
Ontario Trillium Foundation	17,400	18,000
Investment income	969	983
Unrealized gains and losses	5,702	-
	81,651	62,319
Expenditures	41,758	6,366
	39,893	55,953
Grants and Distributions		
Arts, culture, heritage	1,200	-
Health and social welfare	7,228	-
Education and literacy	-	-
Environment	-	-
Recreation	-	-
Children and youth	2,500	-
	10,928	-
Excess of revenue over expenditures for the year	\$ 28,965	\$ 55,953

Thanks to the generosity of our donors and funders, Stratford and Perth County Community Foundation was able to complete start-up related activities this year, provide \$10,928. in grants to the community, and start to build our endowments. Late in the year an Investment Policy was approved that will provide the Foundation with asset growth and asset security. Because of an operating grant from The Ontario Trillium Foundation no funds were allocated from endowment income to support operations. The above represents the highlights of our financial year. The Foundation is committed to complete financial accountability and transparency. Our auditors are Famme & Co. LLP. Full audited financial statements for The Stratford and Perth County Community Foundation are available on request by contacting us by email info@spccf.ca or by phone 519-271-1503.

Board of Directors

Tim MacDonald, Chair – North Perth
Peter Van Drunen, Vice-Chair – West Perth
Anne Walsh, Secretary – Stratford
Berny Nymeyer, Treasurer – Stratford
William Somerville (deceased), Honourary Treasurer - Stratford
Jeff Carruthers – Stratford
Tom Clifford – Stratford
Gerald Culliton – Stratford
Mary McTavish – Perth East
Brenda Mitchell – St. Marys
Annabell Thomson – Perth South

Volunteers

Sharon Basler (Grant Advisory Committee)
Carolyn Dingman (Marketing and Communications Committee)
Ernestine McKenna (Marketing and Communications Committee)
Andrea Page (Marketing and Communications Committee)
Amy Robinet (Grant Advisory Committee)
Richard Smelski (Marketing and Communications Committee)
Don Van Galen (Grant Advisory Committee)

Staff

Elizabeth Hachborn, Executive Director

Stratford and Perth County Community Foundation
Falstaff Family Centre, 35 Waterloo St. N., PO Box 21092, Stratford, ON N5A 7V4
phone: 519-271-1503 fax: 519-271-1504 web: www.spccf.ca

illustrations ©2006 Julianne Waller

2004-2005 COMMUNITY REPORT

dare to dream

Our Mission The Stratford and Perth County Community Foundation exists to enrich the lives of people in Perth County by providing support to charitable organizations through grants made possible by responsible stewardship of endowment funds.

FULFILLING OUR MISSION

Community Leadership

The Foundation educates and encourages citizens of all ages to actively participate in community life. It works within the community to foster dialogue, encourage partnerships, and facilitate consultation about community issues. It uses the community's human and financial resources to bring donors, community groups and individuals together to build a strong, caring, and engaged community.



Community Grant

A 2004 Community Grant to the St. Marys Storytelling Festival provided funds for a "Storytellers in Schools Day" September 8, 2005. Storyteller LeRon Williams visited four Perth County schools – Mornington School, Newton, Upper Thames School, St. Marys, Bedford School, Stratford, and Sprucedale School, Shakespeare.

See inside for our Granting Mission and more Community Grant stories.



STRATFORD and PERTH COUNTY
community
FOUNDATION

Connecting People that care with Projects that matter



Message from the Board Chair and Executive Director



It's been a year of beginnings...a year of new activities initiated with the goal of bringing people together who care about our community. It has been a year that witnessed ideas coming to fruition for many who had up to this time only dreamed of a way that they and others could make a lasting difference in their community. These visionaries understood that communities are strengthened and better equipped to respond to challenges and opportunities by initiatives which build on a community's strengths and assets.

During our inaugural year we set up an office in the Falstaff Family Centre, installed computer hardware and software, produced materials, launched our website, developed strategies and policies, created two new funds and awarded grants.

It was also a year where we listened and learned. Our association with the Perth County Social Planning Council increased our knowledge of the social trends and issues in the county. Through connections with local environmental groups we increased our awareness of what issues affect the future sustainability of our community.



The Honourable James K. Bartleman, (left) with Laura and Tim Tanner. The Donald McTavish Conservation Fund is named for Laura's father.

One of the highlights of our year was the launch of the Foundation by the Honourable James K. Bartleman, Lieutenant Governor of Ontario.

A Community Foundation – although not new to the Canadian landscape – is new to Perth County. As part of a network of community foundations across Canada and member of Community Foundations of Canada, we are guided by the values and principles of community foundations. We are also guided by our mission – to enrich the lives of people in Perth County – and by the three roles that will help us fulfill this mission: donor services; grantmaking; and community leadership.



During the past year we helped donors fulfill their dream of creating the community they envision. See facing page for stories from two donors. We have also helped five charitable organizations in Perth County come a little closer to realizing their vision with grants from the Community Fund.

We have done our share of dreaming... of ways that we can better serve the people of Perth County. We believe that from dreaming comes ideas and possibilities, and from ideas and possibilities come actions. Stephen Leacock's suggestion that dreams precede action points us to the wonderful possibilities that exist and synergy that develops when people with ideas come together to make our community a better place to live. When creative visioning is partnered with a commitment to and knowledge of the issues that affect our community then our cooperative actions are bound to produce positive results.

Dare to dream, for in those dreams our community will grow and thrive!

Tim MacDonald

Tim MacDonald, Chair
Board of Directors

Elizabeth Hachborn

Elizabeth Hachborn
Executive Director

"It may be that those who do most, dream most"

Stephen Leacock

FULFILLING OUR MISSION

Grantmaking

The Foundation brings local knowledge, experience and a network of community relationships to our grantmaking. Grants are awarded to a wide range of registered charities with preference shown to projects which develop community capacity – that nurture and build on the community's strengths and assets, that respond creatively to challenges and opportunities, and that promote partnerships within and between sectors.

Community Grant

AIDS Action Perth received a 2004 Community Grant to develop an online resource to help people living with AIDS (PHAs). The Treatment Information Accessibility Program will connect PHAs, their family, friends, and healthcare and social service providers with information and resources in the treatment of HIV/AIDS. It has the additional benefit of addressing accessibility and privacy needs of PHAs.

Community Grant



Anna Drake performs at the Kiwanis Music Festival held annually in Stratford in the spring. A 2004 Community Grant to the Kiwanis Festival of the Performing Arts provided funds to complete Phase 2 of their website project – an online syllabus. The syllabus provided students, like Anna, and their teachers with timely information about adjudicators, rules, awards, competition classes offered as well as provincial championship qualifying criteria.

Community Grant

The 2004 Community Grant to the House of Blessing provided funds to initiate the Survival Skills for Women Program. A series of ten workshops were held to help women build on their own knowledge and strengths, learn about available community resources, and learn and use important life skills.

Community Grant



The 2004 Community Grant to the United Centre furnished the small board room used by resident and community organizations. Employees from three resident organizations, the United Way of Perth County, Volunteers in Perth, and Stratford Big Brothers, Big Sisters, gather for a meeting.

FULFILLING OUR MISSION Donor Support

The Foundation provides donors with a lasting way to make a difference in their community by building donations through endowment funds. Tax exempt gifts can be made in almost any form. Gifts can be made in the donor's lifetime or by a bequest. Donors may create their own fund (named or anonymous) or contribute to existing funds.

Donor Advised Funds

Donor Advised Funds allow donors to recommend each year to the Foundation's Board of Directors specific organizations to receive grants from their fund. The Donald McTavish Conservation Fund, an example of this type of fund, was initiated by the McTavish Family in memory of their father and grandfather, Donald McTavish, a local conservationist.



Field-of-Interest Funds

Field-of-Interest Funds enable the donor to define a particular field (arts, environment, children, education, etc.) to which the income from the fund will be directed. The Reading Fund, established by the Brightwell Family, is an example of a Field-of-Interest Fund in the area of reading and literacy.

The Community Fund

The Community Fund allows donors to support a broad range of charitable groups and programs each year. Undesignated contributions, large or small, become a part of this Fund, established through a generous gift from the estate of the late B. J. (Bo) Sibold. This fund gives the Foundation the most flexibility to respond to changing needs in the community.



Designated Funds

Designated Funds allow donors to specify, at the time the fund is established, the charitable organization(s) they wish to support. This ensures that these charities continue to receive support for as long as they provide needed service in the community.



Inspiring Reading and Literacy

As children, my sisters and I watched our Mother whose formal education ended before grade eight, gain a great deal of enjoyment, insight and education from her reading. We all became readers and none more so than a favoured sister who died 3 years ago. I could not think of a better memorial to my sister than to start The Reading Fund at the Stratford and Perth County Community Foundation. I hope memorial contributions honouring avid readers will add to this fund and that it will provide support – for years to come – to encourage others to read.

Harry Brightwell

Giving Back to the Community

Being far from our childhood homes, my wife Sam and I have looked for ways to give back to the communities where we grew up. A few years ago we decided that we wanted to support activities in our home towns. We quickly agreed that whatever we supported in the Stratford area should honour my late Grandfather, Donald McTavish – one of the best people I have ever had the privilege of knowing, and Sam's favourite member of my family. I talked to my dad about the idea, and he told me of the Stratford & Perth County Community Foundation. After much thought, we and other extended family members made donations to set up the "Donald McTavish Conservation Fund" at the foundation. It makes us happy to know that money from this fund will support projects that carry on the sorts of work my grandfather would have done or supported himself.



Alec McTavish

For information on how to apply for a grant visit our web site
www.spcf.ca

