

Donors

Thank you to all donors to the Foundation

Accumulated donations to August 31, 2006

Over \$100,000

B. J. (Bo) Sibold Estate

\$50,000 - \$99,999

2005 International Plowing Match
Ideal Supply Company Ltd.
Ontario Trillium Foundation

\$25,000 - \$49,999

The Bickell Foundation
Alec & Mary "Sam" McTavish
Lillian McTavish

\$10,000 - \$24,999

The County of Perth
The City of Stratford
J. W. McConnell Foundation
Robert & Mary McTavish

\$5,000 - \$9,999

Glen & Ruth Hebel
Stuart & Susan McTavish
Tom & Laura Tanner

\$2,000 - \$4,999

Dale Carnegie
Culliton Brothers
The Town of St. Marys
Anne Walsh
William Whitehead

\$500 - \$1,999

Harry Brightwell
Wayne & Peggy Brightwell
Jeff Carruthers
Cavalier Equestrian
Tom Clifford
Community Foundations of Canada
Gerald Culliton
Tim MacDonald
Brenda Mitchell
Berny Nymeyer
Jane Proudlove
Sarah Proudlove
Richard Smelski
William Somerville (deceased)
Annabell Thomson
Peter & Mary Jo Van Drunen

Under \$500

James & Wendy Anderson
Eric Eberhardt
Elizabeth Hachborn
Ernestine McKenna
Bruce & Alison McTavish
Bert & Helen Merrill
Morningson Communications
Scotiabank
Pauline Yang

Gifts-in-Kind

Festival Furniture
Ideal Supply
Anne-Marie Tymec/Mountain Mitchell LLP
Shawna Gigacz/Just Spiffy

design & illustration ©2007 Julianne Waller

Stratford and Perth County Community Foundation Summarized Financial Statements

Balance Sheet		
As at August 31, 2006		
	2006	2005
Assets		
Cash	\$ 8,929	\$ 44,269
Accounts receivable	-	104
GST recoverable	371	740
Prepaid expenses	1,005	381
Investments	580,705	328,415
	<u>\$ 591,010</u>	<u>\$ 373,909</u>
Liabilities		
Accounts payable	1,656	1,027
Grants payable	4,964	2,500
	<u>6,620</u>	<u>3,527</u>
Fund Balances		
Operating fund	59,514	42,013
Endowment fund	510,307	321,783
Restricted fund	14,569	6,586
	<u>584,390</u>	<u>370,382</u>
	<u>\$ 591,010</u>	<u>\$ 373,909</u>

Statement of Operations		
For the year ended August 31, 2006		
	2006	2005
Revenue		
Donations	189,185	40,580
Private foundations	15,500	-
County and Municipality grants	-	17,000
Ontario Trillium Foundation	46,000	17,400
Investment income	9,920	969
Unrealized gains and losses	9,834	5,702
	<u>270,439</u>	<u>81,651</u>
Expenditures		
	<u>44,167</u>	<u>41,758</u>
	<u>226,272</u>	<u>39,893</u>
Grants and Distributions		
Arts and culture	1,000	1,200
Health	2,600	-
Education and literacy	-	-
Environment	1,275	-
Social welfare	3,500	7,228
Children and youth	3,889	2,500
	<u>12,264</u>	<u>10,928</u>
Excess of revenue over expenditures for the year	<u>\$ 214,008</u>	<u>\$ 28,965</u>

This financial information is extracted from the audited financial statements of Stratford and Perth County Community Foundation and, not containing all of the information contained therein, is therefore incomplete. The financial statements, audited by Famme & Co. LLP, are available upon request by contacting us by email info@spccf.ca or phone 519-271-1503

Board of Directors	Ann Slater, Ecological Farmers' Ass'n Donna Taylor, Stratford
Tim MacDonald, Stratford - Chair Mary McTavish, Stratford - Secretary Berny Nymeyer, Stratford - Treasurer	
Fund Development Committee	Beatriu Canet, Stratford
Doug Biesinger, Perth East Dale Carnegie, North Perth Gerald Culliton, Stratford Erie Eberhardt, Perth East Peter Sibold, Stratford	
Grant Advisory Committee	Peter Van Drunen, Chair, West Perth Sharon Basler, North Perth Doug Biesinger, Perth East Dale Carnegie, North Perth Tom Clifford, Stratford Lynne McDonald, Stratford Any Robinet, Stratford Annabell Thomson, Perth South Don Van Galen, St. Marys Anne Walsh, Stratford
Committees	
Environment Advisory Committee	Eric Eberhardt, Chair, Perth East Vanni Azzano, Perth South Elaine Cook, Perth East Joan Daynard, Perth East John Drummond, West Perth Charlene Gordon, Stratford Bonnie Henderson, Stratford Ken Maronets, Perth Stewardship Network Kerry McManus, Stratford Craig Merkle, Stratford David Pullen, Perth South Chris Rickett, Stratford
Marketing and Communications Committee	Carolyn Dingman, Stratford Ernestine McKenna, Stratford Andrea Page, Stratford Richard Smelski, Perth East
Staff	Elizabeth Hachborn, Executive Director

List of Funds

Community Fund Unrestricted Funds

These discretionary funds provide donors with the greatest amount of flexibility for their contribution. This type of fund is not tied to any specific charity or area of interest by the donor, allowing the Foundation to respond to the immediate and changing needs of the community.

Community Fund	250,000
Founders' Fund	6,100
Ideal Supply Community Fund	80,000

Field of Interest Funds

Field of interest funds allow the donor to designate a specific area of interest (e.g. education, children's need, the arts) in which charitable grants will be made.

Environment Fund	5,000
George & Edna Hislop Family Fund	1,200
IPM 2005 Fund	50,000
Reading Fund	2,125
SPCCF Operating Endowment Fund	6,000

Donor-Advised Funds

Donor-advised funds provide donors with the opportunity to be actively involved in recommending, year by year, recipient charitable organizations or programs.

Donald McTavish Conservation Fund	100,082
-----------------------------------	---------

Designated Funds

Designated funds are established to benefit specific charitable organizations named by the donor. The earnings from these funds are distributed to the designated organizations on an annual basis.

North Perth Public Library Fund	5,700
Timothy Findley Fund	4,100

Funds shown in bold were established in 2005-2006

“Everybody can be great...because anybody can serve.”

Martin Luther King Jr.

SERVING THE CHARITABLE SECTOR

Donor Support Endowment Building

We provide donors with a lasting way to make a difference in our community by building donations through endowment funds. Gifts - which may take many forms - 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.

SERVING THE CHARITABLE SECTOR

Grantmaking

We bring local knowledge, experience and a network of community relationships to our grantmaking. Grants are awarded to a wide range of registered charities with particular interest given to projects which build on the community's strengths, respond creatively to challenges and opportunities and promote partnerships within and between sectors.

SERVING THE CHARITABLE SECTOR

Community Leadership

Because we support all kinds of charities, we are well positioned to bring people and organizations together, convening diverse voices and facilitating dialogue to address local issues and opportunities. Our business is building community by engaging with the community to think about important issues and priorities.



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.



Connecting People that care with Projects that matter

Message from the Board Chair and Executive Director

This message is being written in January, the month that celebrates the accomplishments of Martin Luther King Jr. Dr. King is noted for many things including his selfless service to others. "An individual has not started living," writes Dr. King, "until he can rise above the narrow confines of his individualistic concerns to the broader concerns of all humanity." He also writes, "Everybody can be great...because anybody can serve."

Charitable organizations in Perth County – and there are more than 270 of them – serve the community. They work to relieve poverty, advance the arts, educate children and adults, protect the environment, promote good health and physical activity, enhance the lives of seniors and the handicapped, help troubled youth, and promote spiritual growth – among other things.

A recent study (October 2006) carried out by Ipsos Reid indicates that charities continue to have an overwhelming level of trust among Canadians. The study points out that almost 80% of Canadians say they trust charities and more than three-quarters of the nearly 3,900 respondents said that charities are better than government at understanding the needs of Canadians. This is good news for the charitable sector here in Stratford and Perth County and elsewhere in Canada.

Just as these organizations exist to serve the community, the Stratford and Perth County Community Foundation exists to serve these charities. Serving is what community foundations do! There are 155 community foundations in Canada who serve and support the charitable sector in their communities in three important ways: 1) by helping to connect donors to organizations and projects that are important to them, 2) by making grants to local registered charities, and 3) by providing leadership through engaging with the community to think about important issues.

During the past year the Stratford and Perth County Community Foundation served the charitable sector in Perth County in all three ways. First, we helped seven donors to initiate new funds within the Foundation. We also facilitated the growth of existing funds. These funds support many areas of charitable activity in our community. Changes in the income tax laws related to gifts of publicly traded securities will most certainly have a beneficial effect on future gifts and future donors to the Foundation.

In the second area of service to the community we made seven grants from the Community Fund to area charitable organizations and one grant from the Donald McTavish Conservation Fund, with a total of \$12,264. In our two short years of granting, the Stratford and Perth County Community Foundation has granted more than \$23,000. to local charitable organizations.

In the third area of service, assisted by a grant from the J. W. McConnell Family Foundation, we convened local environmental groups to dialogue about issues and opportunities and to help establish priorities for future funding in the sector. The board approved the establishment of a new environment fund which will, along with the Donald McTavish Conservation Fund, support projects which promote a healthy environment.

We are unique! No other non-government funder, no other charity does these three things. In light of recent government cutbacks impacting the charitable, not-for-profit sector, our distinctive role in serving our community has never been more important!

Tim MacDonald
Chair, Board of Directors

Elizabeth Hachborn
Executive Director

New Funds

The 2005 IPM Fund

The 2005 International Plowing Match (IPM) in North Perth was a huge success generating \$500,000. the largest profit in the history of the event which was started in 1913 by the Ontario Plowmen's Association. The IPM Executive Committee saw the initiation of a fund within the Community Foundation as an opportunity to help charitable organizations now and in the future. The 2005 IPM Fund is a field-of-interest fund which will generate income each year in the agriculture, health and education sectors. The committee also felt that a fund would create a living legacy for people to remember this very successful event forever. The fund was initiated with a gift of \$50,000. and a pledge of an additional \$25,000.



The George and Edna Hislop Family Fund

This fund was established by Sarah Proudlove and Jane Proudlove to honour their parents and grandparents, George and Edna Hislop, lifelong residents of Downie Township. The Hislops farmed for many years on the Embro Road where they raised their family. The disbursements from this fund will support children and families in need who reside within Perth County. Started with a modest investment, the Proudloves want other potential donors to know that you don't have to be Bill Gates or Ken Thomson to make a difference. "You don't need a fortune to initiate a fund," says Jane, "only a cause that's important to you."



The Ideal Supply Community Fund

Noted for its commitment to customer service and community-mindedness, Ideal Supply Company Ltd., with its head office and distribution centre located in North Perth and with 23 branch operations throughout southwestern Ontario, celebrated 80 years in business with a gift to the Community Foundation. "It is our goal to work toward achieving safe and economically vibrant communities where citizens - individual and corporate - work together to improve the quality of life for each other," says President and CEO, Tim MacDonald. "This has always been the foundation of our corporate philosophy." Income from the fund will support a variety of causes in Perth County.



The Timothy Findley Fund

This donor designated fund was initiated by William Whitehead, longtime friend and partner of Timothy Findley, to honour the memory of "Tiff," one of Stratford's most notable citizens. Mr. Findley, a well-known Canadian actor, author, and playwright wrote many novels, short stories, and scripts for radio, film and television. Grants from the fund will be made to the Stratford Book Festival and the Children's Book Festival to support the Timothy Findley Featured Authors Series which promotes Canadian authors.



The North Perth Public Library Fund

'Friends of the North Perth Public Library' along with other library supporters initiated this fund to provide ongoing financial help to the three branches of the North Perth Public Library system. "It is our hope," says Sheila Durand, CEO "that additional donations to this fund will provide library patrons with a wonderful way

Community Grants

from the Community Fund

A grant to **Canadian National Institute for the Blind (CNIB)** provided funds to set up a volunteer based group to assist Stratford and Area seniors and others experiencing vision loss to adjust to their loss through community based peer support

A grant to **Huron-Perth Children's Aid Society** supplied educational resources to enhance an existing Ontario Housing program - 'Circle of Friends' After School Program - on site at Franklin Dr. in Stratford. The program addresses conflict resolution, communication skills, respect, bullying, and harassment.

A grant to **Mitchell & Area Community Outreach** funded a project called "Spreading Joy in the Community." This project, designed for seniors and special needs children and adults, was held during the holiday season and helped to reduce isolation, loneliness, and depression which is often experienced during this time of year.

A grant to the **Perth County Health Unit** funded a project in North Perth called 'Young Parent's Place.' Modeled after a successful similar program in Stratford, this drop-in program is for young parents and their children. It is designed to provide easy access to education, peer and professional support, opportunities to build skills and foster healthy child growth and development.

A grant to **Stratford & Area Access to Independent Living (SAAIL)** supported a project to help them reach out to the community by providing materials to help promote SAAIL services to the consumer, potential donors, and the community.

A grant to the **Stratford Book Festival** initiated a children's program to bring authors and illustrators to Avon-Maitland Elementary Schools. The program will be an ongoing part of the Book Festival.

A grant to **Voices**, a program of Community Living - St. Marys, funded a project called 'Where to Find It.' This is a visual, user-friendly, plainly written guide to help people with developmental disabilities, their families, and all citizens of Perth County access information about services in the area.

from the Donald McTavish Conservation Fund

A grant to the **Upper Avon River Conservation Club** provided funds to plant a combination of hardwood and softwood seedlings on a 4.5 acre block of land located on the farm of Bob & Marg Irvine in the Upper Avon River watershed near the village of Shakespeare.

to share their love of the library. The fund will assist in the development and enhancement of library services for many more generations of readers - young and old - to enjoy."



The Environment Fund

The Foundation is aware that individuals and communities are becoming increasingly concerned about their environment. The connection between environment issues and health, economic vitality and quality of life - in both rural and urban areas - is increasingly clear. With the help of a grant from the J. W. McConnell Foundation, the Board of Directors approved an initiative to increase environmental action. Local environmental groups were convened to dialogue about issues and opportunities and to help the Foundation develop funding priorities and increase the effectiveness of grants to the environment sector. The Board of Directors earmarked \$5,000. from the McConnell grant to initiate an environment fund which would reflect a wide focus for environmental granting.

The SPCCF Operating Endowment Fund

Funding day-to-day operations is always a challenge for community foundations. Because the mission of community foundations is service to charitable organizations, to compete with these organizations for operations funding would be counterproductive. There are a variety of ways that community foundations choose to fund administrative costs, the most established being assessing an administrative fee on each endowment fund. Other ways include event fundraising, soliciting individual and corporate donations, and setting up an operating endowment fund within the foundation. While the Foundation will be using a combination of all these methods, in a forward-thinking move, the Board of Directors initiated an Operating Endowment Fund that will grow over time, the income from which will help to support the cost of operations.

TIP!

Recent changes to the income tax laws will encourage gifts to the Community Foundation and provide tax incentives for individuals who wish to donate publicly traded securities. A gift of appreciated securities to the Stratford and Perth County Community Foundation has two important benefits for the donor. First, a charitable receipt for the appreciated value of the donated securities is issued. Second, no capital gain is incurred. A win-win situation!

