



# 2017 ANNUAL REPORT

helping good people build smart  
and caring communities

# OUR VISION

Realizing community dreams through philanthropy.

# OUR MISSION

The Niagara Community Foundation improves the quality of life in Niagara through philanthropy.

# OUR GUIDING PRINCIPLES

## ENABLE, COLLABORATE AND TRANSFORM:

Enable community improvement by providing funding and community knowledge. Bring organizations together to form partnerships based on the respective strengths of each organization to focus on key community priorities.

## DEMONSTRATE PHILANTHROPIC LEADERSHIP:

Demonstrate expertise and best practice in philanthropic leadership.

## PUT NIAGARA FIRST:

Communicate and support the Niagara story. Build community leadership. Seek and develop individuals who will bring leadership to the community.

## BE TRUSTWORTHY AND TRANSPARENT:

Engage in practices that are open, accessible, fair, objective, flexible, timely and built on a foundation of respect, trust, integrity and honesty.

## ENSURE SOUND GOVERNANCE AND MANAGEMENT:

Ensure that the Niagara Community Foundation governance and management is sound, relevant and realizes its full fiduciary responsibility.

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# EXECUTIVE MESSAGE

In a year of exciting news and monumental growth, the Board of Directors and Staff of the Niagara Community Foundation are proud to share the accomplishments from the past year of our donors, volunteers, grant beneficiaries, charitable partners and community leaders. Simply put, our success is the community's success and we are keenly aware that it is the collective work of the many who make our community stronger, day in and day out.

A recap of 2017 would not be complete without the acknowledgment of the significant donation from the David S. Howes Foundation. Transformative to the Foundation and to Niagara, the David S. Howes Foundation gift virtually doubles the granting capacity of NCF to support a cross-section of the Region's highest needs. Among the remarkable aspects about this gift, and perhaps most humbling, is the trust and confidence placed in our organization by David himself, his loved ones and those individuals with whom he trusted the affairs of his Estate and Foundation.

As significant and wonderful as such monumental gifts are, we also truly value the gifts of donors of more modest means whose philanthropy, while not as large in scale, but in relative terms may represent a substantial proportion of their personal assets. Every donor is special and each has a unique and meaningful story about their own reasons to give back to the community.

The Foundation's activity continues to be guided by the 2015 – 2017 Strategic Plan. You will find the highlights on the following page. 2018 will see the rollout of our next Strategic Plan which will light our path and focus our efforts as we look towards 2022. A tremendous amount of work was done over the last 12 months – including 23 one-on-one stakeholder interviews, advice and feedback from our Community Leadership Committee and several Board plenary sessions. With 2018 and beyond on the horizon, we are determined to build on the momentum and impact we have had throughout the Region.

Speaking of impact, 2017 saw another significant milestone reached. By granting another \$1.3 million dollars to charitable organizations, we surpassed the \$10 million dollar mark – and then some – bringing

our total impact to the community to \$11 million since 2000 from Grimsby to Fort Erie and literally every municipality in between. Beyond the financial aspects, the stories of some of our community grant recipients that start on page 6 are nothing short of inspiring. The depth and breadth of our donor directed grants may also be found on page 16. Through these grants, our vision of 'realizing community dreams through philanthropy' comes alive. You will find the named Funds supporting these grants starting on page 25.

An organization like ours may only accomplish what it is able to with great thanks and appreciation to the countless volunteers who freely give of their time and talent. The last few pages of the report provide an extensive listing of our volunteers and supporters. Our success and impact in the community would not be possible without these dedicated individuals and organizations.

Finally, we would like to express our gratitude to two dedicated individuals who are completing their formal duties as Directors of the Foundation: Dino A. DiCienzo and James (Jim) Howden. These steadfast volunteers will be stepping off the Board as of April 2018. Both have consistently brought invaluable expertise, insight and professionalism around the Board table and to the Committees they have faithfully served on and our organization is all the stronger for their service.



Robert (Bob) Watson,  
*Board Chair*



Bryan J. Rose  
*Executive Director*

# PRIORITIES, STRATEGIES, PLANS

## HIGHLIGHTS

2017 was transformational year for the Foundation. Here are some of highlights of the Foundation's impact in the Niagara Region:

- Proudly announced the \$18+ million dollar donation from the David S. Howes Foundation
- Awarded \$1.3 million in grants bringing the total amounted granted since 2001 to \$11 million
- Approved 32 new endowment funds including two legacy (planned) gifts bringing the Foundation's total assets from \$30.5 million to \$50.6 million, representing a 66% increase
- Continued efforts with 11 charities on bolstering their Planned Giving programs through with the Legacy Partners Program (LPP)
- Began work with our first partner in the Governance Partner Program (GPP) and cultivation of other potential partners
- Supported the launch of the 2017 Living In Niagara Report with Niagara Connects at our Annual Leaders Breakfast
- Along with several other charity partners, hosted a successful "Feel Good Giving" Event for Allied Professionals
- Confirmed re-accreditation with the Imagine Canada Standards Program
- Created 23 new Make Your Mark endowment funds in celebration of Canada's 150th anniversary
- Through our own two rounds of Canada 150 Grants, along with the match from our Community Foundation of Canada partners, we were able to fund 17 unique projects here in Niagara for a total of \$120,000

We realize that collaborative partnerships with funders and other organizations will go a long way toward ensuring that our grant recipients, their clients and our donors receive quality service and support from the Foundation. Here are some examples of how the Foundation has continued our partnerships in 2017 with others:

### Niagara Prosperity Initiative

The Niagara Prosperity Initiative (NPI), funded by Niagara Region, is a partnership of public, private and voluntary organizations working to reduce poverty in Niagara. In 2017, funding was renewed to continue to support two Convener positions. This enables us to bring organizations and volunteer community groups together to share resources, implement best practices and collaboratively access funds to support a variety of poverty-reduction initiatives and programs to support the needs of children and families throughout the Niagara. Staff from the Foundation also assisted with the review of the grant applications for \$1.5 million in NPI funding.

### Niagara Connects

The Foundation has been a partner with this project since the organization's inception. Niagara Connects, a Niagara-wide network for collaboration, planning, learning, innovation and community action toward a stronger future for Niagara, has four core products: Living in Niagara Report, Niagara Knowledge Exchange, Niagara Community Calendar and Linking Niagara. 2017 also brought the launch of another Living In Niagara Report which continues to be a foundational document used by local government, charitable organizations and non-profit agencies throughout the Region.

### External Investment Managers Program

The Foundation is always looking for new ways to help donors in achieving their philanthropic goals and to work with professionals in the financial, estate and investment world in mutually beneficial relationships. In 2012, the Foundation created the External Investment Managers Program which allows assets gifted to a newly created fund to be invested outside of Foundation's Consolidated Investment Fund in a portfolio managed by the donor's recommended investment firm. This program is available for advisors who have been licensed as a portfolio manager actively involved in discretionary investment management of segregated portfolios for a minimum of three years. The minimum donation required for a fund manager to participate in this program is \$1,000,000. Gifts under this amount will be considered on a case-by-case basis. There are currently four portfolio managers participating in this program.



# FINANCIAL HIGHLIGHTS:

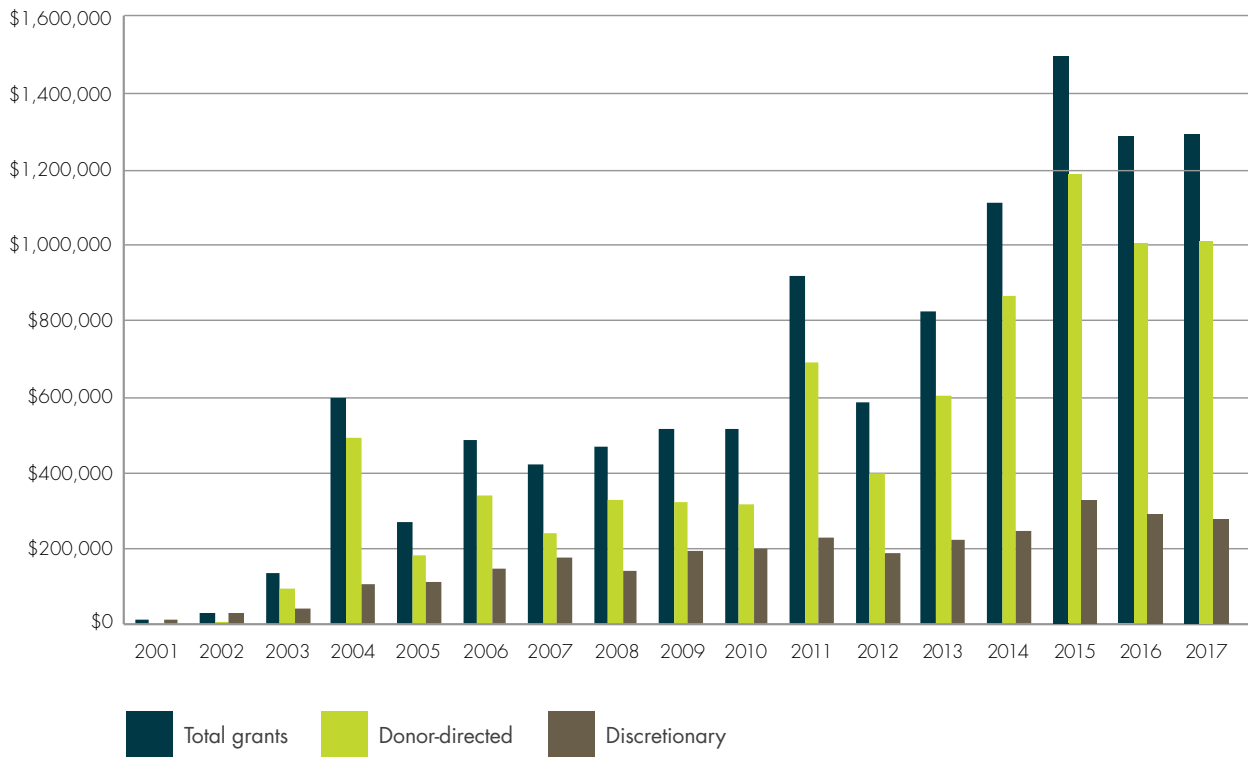
**GIFTS RECEIVED:** \$17,693,530

**GRANTS AWARDED:** \$1,300,524

**GROWTH IN ASSETS:** 60%

**OPERATING EXPENSES** (excluding special projects): 0.86%

## GROWTH IN GRANTS 2001 - 2017





# GRANTS enable community dreams

## HUMANITARIAN BOARDING FOR PETS

### LINCOLN COUNTY HUMANE SOCIETY

Research shows that women living with abusive partners won't leave if they can't take their pets with them.

But, for a victim of domestic violence, finding someone to take in a loyal companion while she tries to leave her situation and rebuild her life can be a challenge. A woman may have become so isolated from friends and family that she has no one to turn to, and boarding can be prohibitively expensive. She knows that leaving her pet behind can put the companion animal in harm's way, and it can also give her abuser leverage over her, even as she tries to escape the difficult situation.

The Lincoln County Humane Society (LCHS) hears stories like this on a near daily basis. That's why the St. Catharines-based shelter reached out to the Niagara Community Foundation for a community grant to offer humanitarian boarding for pets, with the intention of making it easier for women to leave abusive relationships.

The \$4,000 granted by the Foundation in 2017 provided lodging for seven dogs and five cats for up to 20 nights. That helped ease at least one worry for eight women who made the brave decision to rebuild their lives.

"We asked for the grant to see how well-received it would be and it was really well-received," says Michelle Harder, director of outreach and resource development at the LCHS. "This was something we could do so there was one less challenge these women had to face."

## RESTORATION AND REVITALIZATION

### WEST LINCOLN

Cleaner water and a greener park are being made possible in the hamlet of Wellandport, thanks to a \$5,000 environmental grant from the Niagara Community Foundation.

The Township of West Lincoln used the funds to buy and plant close to 20 larger-diameter trees along the banks of the Welland River at the Wellandport Community Park, delineating a better parking area and preventing shoreline erosion caused by vehicles being driven too close to the water's edge. New signage educates boat ramp users on how to avoid damaging the shoreline and how to protect water quality, while the trees were planted with "tree bags" that hold moisture and nutrients to aid their survival.

An ongoing partnership between the Township of West Lincoln and students from Smithville Christian High School saw Grade 9 students mapping the area and helping to develop a master plan for the park, while township staff planted the trees. The tree planting and new signage coincide with significant other investments in the park, including a new library, plus plans for a new sports field, picnic pavilion and walking trail.

Keeping vehicles away from the water's edge, plus the stabilizing effect of the trees' roots, will help restore the shoreline and revitalize the park, said West Lincoln planner Gerrit Boerema.

### QUEENSTON CANADA 150

Canada 150 celebrations were that much more meaningful in the village of Queenston, thanks to the Niagara Community Foundation.

A \$9,000 grant from the Foundation made a party possible when the Queenston Celebrates Canada 150 Committee had been turned down elsewhere for funding to host an event that honoured the village's and country's past and future.

The grant enabled the committee to make and mark history with the purchase and mounting of a commemorative plaque in a new park. The monument highlights Queenston's 225 years of rich history and demonstrates to future residents the pride of generations before them.

Funds also contributed to the planting of 150 maple saplings in the park, a most Canadian symbol, that will make the new green space a focal point and shady refuge as they take root and grow.

The money also funded the research and compilation of the Queenston's history in one volume. It's by no means complete, says Carley Agnew, chair of the Canada 150 committee. But so far it's brought complete joy to village residents, as do the memories of Queenston's Canada 150 celebrations, which were held on Sept. 23, 2017.

"Everything just fell into place," Carley says. "By having the grant money, it gave us the time to do the research we wanted to do on historical homes, and produce a document for people here. People who have been here for 50 years are so thankful someone has done it."

## A COMMUNITY'S RICH HISTORY



## BETHLEHEM HOUSING AND SUPPORT SERVICES

Children whose lives may be in disarray have a safe and natural place to play in a new playground built with the help of the Niagara Community Foundation.

Bethlehem Housing and Support Services built the \$120,000 natural playground with a significant amount of volunteer help, fundraising, and a \$10,000 contribution from the Niagara Community Foundation's social services fund.

The playground is open to children who are living in Bethlehem's supportive housing complex and it's also open to children who attend the EarlyON learning centre housed at the site.

The playground is unique because of the all-natural playscapes it offers to encourage imagination and environmental appreciation. There are no brightly coloured steel supports or molded plastic panels – instead the playground is made of tree stumps, rocks, fallen logs, and sand pits and offers children and their parents opportunities for imagination and risk-taking. There's a cabinet full of digging and mixing tools, stumps to climb on and crawl through, and a tap that makes small amounts of water available for mudpies. It was built in a small space, but preserved the maple tree that had graced the area.

Parents whose children have used the space say the combination of safety and creativity makes kids feel comfortable and able to learn. "The environment gave my children a chance to play safely and we learned new things together," said one mother. "The sand area was our favourite, as well as my daughters [being able] to ride bikes together."

A SAFE AND NATURAL  
**PLACE TO PLAY**



NIAGARA COMMUNITY  
FOUNDATION:  
**MAKING A  
MARK IN 2017**

## CANADA 150



Niagara residents laughed, sang, played lawn games and learned about heroes, history and heritage – all in honour of the 150th anniversary of Confederation and thanks to the Niagara Community Foundation. In both 2016 and 2017, the Niagara Community Foundation funded a wide variety of innovative projects across Niagara that celebrated community and inspired a deeper understanding of Canada.

The initiatives in Niagara were part of a nationwide collaboration which included 190 other community foundations, and which saw similar events taking place from coast to coast. Funding came from the Niagara Community Foundation, the Government of Canada and extraordinary leaders.

In 2017, the Niagara Community Foundation awarded matching grants totalling \$60,000 to 10 different projects, which, when added to the 2016 projects, means a total Canada 150 contribution of \$120,000 for 17 celebrations. The 2017 projects include:

**Dominion Repertory Theatre, Fort Erie Secondary School** – \$7,400 to stage “But We Said Please!” a comedic and celebratory live musical theatrical production exploring Canadian history and culture.

**Heartland Forest Nature Experience** – \$8,000 to create an exhibit and accompanying education program, “Celebrating our Early Naturalists,” to recognize the efforts of historic Canadian naturalists, their early observation and collection techniques, and their contributions to science and conservation over the past 150 years.

**I Am Compelled** – \$2,000 to present the “Hope Tour,” a dramatic production written to inspire elementary school students, especially of First Nations heritage, to learn about Canadian heritage and historical heroes, and to encourage them to be responsible citizens.

**Niagara Falls Public Library** – \$5,000 to access and reproduce photos from the library’s Historic Niagara Digital Collections archive, and to display them, “Then and Now” throughout the city in the locations where the original photos were taken.

**Royal Canadian Legion Branch 230** – \$4,000 to fund a Canada 150 Celebration including a parade through the town of Ridgeway and a display of heritage arts on the Legion grounds.

**Shaw Festival Theatre Foundation** – \$5,000 to create and stage innovative and high-quality programming illuminating the history of Canada and Niagara and engaging the community outside the traditional theatre experience.

**The Essential Collective Theatre** – \$10,000 to write and stage the “Welland Canal Play,” an original theatrical presentation, for audiences of all ages, about the history and impact of the Welland Canal in Niagara, and about the people who toiled over the past 150 years to create this vital waterway.

**The Weir Foundation, The RiverBrink Art Museum** – \$8,000 for “Dreams and Schemes - Building The Welland Canals,” an exhibit of art works depicting the Welland Canals from the earliest renderings, and including both actual and imagined projects, in a broad survey spanning the 19th to 21st centuries.

**Town of Niagara-on-the-Lake, Queenston Residents’ Association** – \$9,000 for “Queenston Celebrates Canada’s 150th,” a three-part event including the planting of indigenous species of trees, guided walking tours exploring the built history of the village, and a village ceremony with civic speakers, a choral performance, barbecue and lawn games in the new village park.

**Wainfleet Historical Society** – \$1,600 to create and erect a plaque at the Feeder Canal, outlining the history of the canal and its significance to the development of the community of Wainfleet.



WATER PROVIDING  
**A VIBRANT  
GREENSPACE**

## ST. JAMES AND ST. BRENDAN ANGLICAN CHURCH

Improved plumbing is creating a vibrant and educational greenspace in downtown Port Colborne and a promise to welcome neighbours of all ages, thanks to a grant from the Niagara Community Foundation.

A new water supply for recently purchased buildings across from St. James and St. Brendan's Anglican Church will make it possible for the church to run irrigation to a community garden project, a woodworking shop and a life skills centre for youth. The \$5,000 grant from the Niagara Community Foundation allowed the parish, which seeks the thriving and flourishing of its community, to begin tackling the ambitious intergenerational project at the corner of King and Charlotte Streets.

The church intends to turn the adjacent empty lot into a community park and will use the new water line to provide irrigation to a community garden. Next to one of the buildings, the church will construct a living wall garden to grow edible plants, and will use both the garden and living wall to demonstrate sustainable, small-space gardening. Taking advantage of the gardens' highly visible location in the urban core, the church will also offer workshops on gardening, harvesting, and cooking with fresh produce. Volunteers from the church will be building the gardens, while volunteers from the local garden club have offered to share their expertise with novice gardeners.

Vegetables aren't the only things that will be growing as a result of the new water supply. A local woodworking club has expressed interest in moving into one of the recently purchased buildings, while the second will become home to "Ozzie's Garage," a centre offering social programs for local youth.

"Our mission is to be the heartbeat of the city," said church member and project organizer Lynda Reinhart.

## A PIONEER CHURCH'S RETURN TO GLORY

### FRIENDS OF BEAVERDAMS CHURCH

Beaverdams Church is more than an old building in need of fixing up.

Just ask the Friends of Beaverdams Church, the community group that has taken it upon itself to restore this heritage structure to its original glory in the historic Thorold neighbourhood.

The pioneer church, built in 1832 in the austere style of a New England meeting house, stands tall as a beacon of community identity, despite years of neglect before the Friends came along.

But restoring a heritage building is a labour of love —and an expensive endeavour at that. The Niagara Community Foundation eased that financial burden when it provided \$4,000 to replace two of the 26 windows in the church last year.

That cash infusion kickstarted a vigorous campaign that raised all the money needed to replace every window in the church. It also enabled the Friends to move on to their next task of refinishing siding on the church.

When restoration is complete, Beaverdams Church will be an official stop on a trail of historic sites relevant not only to Thorold but all of Canada. It will be used seasonally to host visitors and community events, just as it was always intended.

“The Niagara Community Foundation grant was pivotal because that got the ball rolling,” says David Cowan, president of the Friends of Beaverdams Church. “We got the (window) project done in less than a year, which shows the community’s support for it.”







## ON THE ROAD WITH **NEW WHEELS**

### COMMUNITY LIVING FORT ERIE

Serving a clientele with mobility issues adds extra challenges to the job, so having an extra set of wheels can make things roll that much more smoothly.

Community Living Fort Erie has a new wheelchair accessible van on the road, thanks to a grant from Niagara Community Foundation's social services fund. "Transportation is one of the biggest barriers to inclusion for people with intellectual and physical disabilities," says Margaret Fidler, Community Living's manager of community development. A \$6,000 Foundation contribution to a new accessible vehicle helps ensure 15 years of safe, reliable, affordable transportation to medical programs, job training, respite care, or community supports for dozens of clients and their families and caregivers.

In particular, Community Living Fort Erie identified gaps for youth from the ages of 14 to 24, who, whether they live with their families, in group homes, or with alternative families, need to be able to access training for employment skills, and gain confidence and connections to prepare them for adulthood. Participating in community programs and activities allows them to acquire skills, build confidence, and form natural support networks. In contrast, public transportation in Fort Erie is both expensive and infrequent, in addition to being inaccessible, which leaves these youth at the risk of being socially isolated and marginalized. Each person supported by Community Living Fort Erie has a self-directed plan with measurable goals, and transportation is often what is needed to meet those goals.

The new van means "people with physical challenges will have the opportunity to be included in their community in ways that are meaningful and valuable to them," says Fidler.



# 2017 GRANTS AWARDED

From our Community, Mini, Environment, Summer Camp and Strategic Initiatives grant programs

For detailed information on our current granting priorities visit the grants section at [www.niagaracommunityfoundation.org](http://www.niagaracommunityfoundation.org)

Alzheimer Society of Niagara Region	Design and print a booklet detailing ASNR programs and services to help individuals and families easily navigate what is available to assist them and suitable to their needs.	\$2,800
Bethlehem Housing and Support Services	Revitalize and redevelop the Bethlehem Place playground and the extended yard to create an inclusive natural environment and playground for children of all ages and their families to enjoy.	\$10,000
Canadian Chamber Academy (Music Niagara)	Pilot program to bring professional, world-class music concerts to seniors in nursing homes or residences, and their friends and families, for those who have limited capacity to go out to a concert.	\$7,000
City of Niagara Falls - The Park in the City Committee	Continue to plant native trees along the Warren Woods Trail as the final phase that will help create shady areas for residents who utilize the trail.	\$4,000
City of St. Catharines - Links for a Greener Learning	LGL will host events in recognition of Earth Day 20 consisting of two expositions, nature tours and an Eco Fashion show.	\$3,000
City of Welland	Support Festival to bring the community together with food and the different cultures that make up the diverse fabric of Welland.	\$5,000
City of Welland	(Welland Neighbourhood Project) Purchase sport equipment and craft supplies to be used by the community as the group moves activities from park to park throughout neighbourhoods in Welland each week.	\$500
Community Care of St. Catharines and Thorold - Niagara Nutrition Partners	Redesign website to create a new front end donor and community portal to compliment the communication strategy which will enhance the engage, acknowledge, interact and retain donors and volunteers.	\$4,000
Community Living Fort Erie	Purchase of a wheelchair accessible van to help remove one of the greatest barriers to inclusion for people with intellectual and physical disabilities.	\$6,000
Community Living St. Catharines	Produce a video for widespread distribution showcasing "ability" rather than disability highlighting inclusion by fostering public awareness while promoting vision of "a community where we all belong".	\$6,500
Food4Kids Niagara	Develop a Food4Kids program in Niagara that will feed children most in need during weekends. To ensure sustainability by building capacity and resources needed in year one start up.	\$5,500
Fort Erie Multicultural Centre	Purchase child car seats to be used when providing transportation to and from immigration medicals, refugee claimant hearings, housing appointments, and other areas for newcomers in our community.	\$500
Friends of Beaverdams Church	Our long term goal is restoring the 1832 Beaverdams Church in Thorold. Our immediate project is the replacement of six of the twenty-six windows as an inspiration for further donations.	\$4,000
Friends Of Fort Erie's Creeks	Mentor post-secondary college/university students in the methodologies and application of various environmental monitoring processes whilst utilizing their assistance to conduct an environmental study on Frenchman's Creek.	\$3,500
Grimsby Public Art Gallery	Purchase time capsule and supplies to be used to celebrate Canada's 150th celebrations with internment of the capsule at the town's new Southward Park during the mid-summer festival, Happening at the Forty.	\$500
Grimsby Public Library Board	Digitize the Grimsby Independent newspaper from 1885-1949 so that it is accessible through the Our Ontario Newspapers website. This platform would allow researchers around the world access to the paper.	\$5,000

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Habitat for Humanity Niagara	Redesigning website by incorporating new brand standards, adding a portal to effectively promote its three ReStores and improve functionality and usability.	\$5,500
Head Injury Association of Fort Erie	Pilot an innovative program to deliver Caregiver Respite Services to persons with acquired brain injuries, dementia-Alzheimers and stroke. Pilot planning was made possible through the Ontario Trillium Foundation.	\$6,000
Heart Niagara Inc.	Re-assess/follow with grade 5 students seen in both school boards in 2013, to evaluate and explore if information regarding their lifestyle behaviours and cardiometabolic risk has changed in grade 9.	\$6,000
Heartland Forest Nature Experience	Purchase wood, materials, fabric and sewing machine for the volunteer creation of a new puppet theatre for Heartland Forests' popular programming.	\$500
I CAN Therapeutic Equestrian Riding Association of Niagara Inc.	Partner with Port Colborne Speech and Language Therapy to provide hippotherapy as an alternative setting for the provision of speech-language and swallowing intervention for Niagara.	\$3,800
Lincoln County Humane Society	Provide humanitarian boarding for pets, to women who are victims of domestic abuse, to facilitate their decision to leave their abusive situations.	\$4,000
Lincoln Public Library	Purchase STEM (Science, Technology, Engineering, Math) equipment for children and youth programs to assist the library is enhancing technology and goal of being an education and technology hub for the community.	\$500
Momentum Choir	After 10 years, revitalize brand with the creation of a new professional brand identity and a brand guidelines document.	\$2,500
Niagara Pumphouse Visual Arts Centre	Purchase laptop and software, resources that we require to continue to grow to meet the growing demands of the community.	\$500
Niagara Regional Native Centre	Support of the annual Powwow.	\$500
Niagara Symphony Association	Produce commemorative book "On The Down Beat, 70 Years of the Niagara Symphony Orchestra" to celebrate 70th anniversary, documenting seven decades.	\$5,000
Open Arms Mission of Welland Inc.	Create a marketing link to connect the Ministry Campus Warehouse and the Redeemed Goods Store, while promoting sales of furniture and large household items through the shopping terminal.	\$1,500
Pathstone Foundation	Pathstone is becoming a Trauma-Informed Agency, recognizing the severe and pervasive impact trauma has on families and grant will support the third crucial step to train professional mental health therapists.	\$5,000
Positive Living Niagara	Support, Bikes for Farm Workers project that supplies refurbished bicycles to migrant workers in Niagara-on-the-lake and surrounding areas connecting them to health, social and recreational services.	\$5,000
St. James & St. Brendan Anglican Church	Reestablish water and add irrigation lines on recently purchased property to service community garden and a living wall and build and prepare pallets for planting season.	\$5,000
The Adult Literacy Council of Greater Fort Erie	Pilot a drop-in GED program where learners receive assistance from a certified instructor in 2 of the 5 areas of the test (writing & math).	\$3,700

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The Essential Collective Theatre	Support live theatre production that explores the situation of migrant workers in the Niagara through drama, building better understanding and empathy between existing community members and newcomers.	\$5,500
The Hope Centre	Replace five failing computers at The Hope Centre's walk in Resource Centre, to be used by low income/ homeless individuals; the technology they need to work, live and thrive.	\$2,500
The Norm Foster Theatre Festival	Conduct 2 half day development workshops for each of our two 2018 World Premieres and to present a free public reading of each at the FirstOntario PAC.	\$2,500
The Salvation Army - St. Catharines Booth Centre	Purchase computer to be used for essential everyday tasks; creating programs, keeping records and social networking in our community.	\$500
Therapy Tails Niagara	Redesign website to make professional impression and assist in raising funds, inspire confidence and create interest.	\$3,000
Thorold Co-Operative Nursery School Inc.	Improve the outdoor play area at the nursery school to be used in daily learning activities.	\$300
Thorold Public Library	Create a mobile maker space made up of but not limited to a 3D printer and a camera to foster creativity and to encourage community collaboration.	\$6,000
Town of Fort Erie	Fund the application of a protective coating on the change room floors of the Kinsmen Pool, to improve safety, sanitary conditions, and reduce volunteer expense and resources.	\$3,500
Township of West Lincoln	Tree Planting and Shoreline Improvement Project for the Municipal Wellandport Community and Boat Launch area that will improve the integrity of the Welland River shoreline, water quality and aquatic habitats.	\$5,000
Welland Public Library Board	Purchase board games and computer games to provide alternative activities for children and youth to borrow while visiting the library, to be shared amongst all the city branches.	\$500
Women's Place of South Niagara Inc.	Hire consultant to lead sessions to create new 3 year Strategic Plan starting April 2018.	\$5,000
YMCA of Niagara	Purchase multi sensory equipment for the Summer Day Camp to support children with exceptional needs within a camp setting to increase learning and development.	\$5,000
Summer Camp Grants	Provided bursaries to 16 groups to support 220 children to attend summer camp.	\$19,730
Strategic Initiatives Grants	Legacy Partners Program Grant that supported Red Roof Retreat and Women's Place of South Niagara Inc.	\$4,000
Strategic Initiatives Grants	Leadership Niagara Bursary to support 5 individuals from charitable organizations in Niagara.	\$7,500
Strategic Initiatives Grants	Entrepreneur of the Year Award grant to Port Cares - Reach Out Centre the charity of choice from winner Larry Boggio.	\$5,000

# 2017 DONOR DIRECTED GRANTS

These grants are based on terms of the fund agreements between the donor and the Foundation with respect to beneficiary organizations.

Adelphi University.....	\$1,000	Education Foundation of Niagara.....	\$401
Alzheimer Society of Niagara Region .....	\$845	Education Foundation of Niagara.....	\$87
Amici Camping Charity .....	\$3,000	Education Foundation of Niagara.....	\$90
Animal Assistance Society of the Niagara Region .....	\$826	Education Foundation of Niagara.....	\$283
Animal Assistance Society of the Niagara Region .....	\$1,174	Education Foundation of Niagara.....	\$7,022
Arthritis Society Ontario Division - Niagara Peninsula Office .....	\$464	Education Foundation of Niagara.....	\$127
Arthritis Society Ontario Division - Niagara Peninsula Office .....	\$103	FirstOntario Performing Arts Centre.....	\$1,000
Beamsville Church of Christ.....	\$50,000	FirstOntario Performing Arts Centre.....	\$2,500
Benevolent Society of Grimsby and District .....	\$5,417	FirstOntario Performing Arts Centre.....	\$235
Bert Miller Nature Club of Fort Erie .....	\$550	Fort Erie Conservation Club .....	\$484
Bethlehem Housing and Support Services.....	\$1,679	Fort Erie Society for the Prevention of Cruelty to Animals .....	\$750
Bethlehem Housing and Support Services.....	\$470	Friends Of Fort Erie's Creeks .....	\$488
Big Brothers Big Sisters - Grimsby Lincoln, West Lincoln .....	\$5,767	Georgian College.....	\$600
Big Brothers Big Sisters of Niagara Falls .....	\$709	Georgian College.....	\$750
Big Brothers Big Sisters of South Niagara .....	\$743	Gillian's Place .....	\$845
Big Brothers Big Sisters St. Catharines, Thorold and District .....	\$1,000	Grimsby Life Centre Ministries .....	\$5,417
Bob Gale Recreation Fund .....	\$15,000	Grimsby Museum (Town of Grimsby).....	\$312
Boxrun Charitable Foundation .....	\$1,302	Habitat for Humanity Halton-Mississauga .....	\$400
Brock University - Office of Development and Donor .....	\$1,000	Hamilton Health Sciences .....	\$751
Brock University - Student Awards and Financial Aid .....	\$600	Healthy Minds Canada .....	\$371
Brock University - Student Awards and Financial Aid .....	\$1,500	Heart and Stroke Foundation of Ontario.....	\$845
Brock University - Student Awards and Financial Aid .....	\$521	Heart and Stroke Foundation of Ontario.....	\$464
Brock University - Student Awards and Financial Aid .....	\$1,000	Heart and Stroke Foundation of Ontario.....	\$103
Brock University - Student Awards and Financial Aid .....	\$600	Heart Niagara Inc. ....	\$500
Brock University - Student Awards and Financial Aid .....	\$600	Heart Niagara Inc. ....	\$40,000
Brock University - Student Awards and Financial Aid .....	\$600	Heart Niagara Inc. ....	\$35,000
Brock University - Student Awards and Financial Aid .....	\$820	Hospice Niagara.....	\$1,000
Brock University - Student Awards and Financial Aid .....	\$1,500	Hospice Niagara.....	\$11,000
Burlington Rotary Community Hospice Inc. (Carpenter Hospice) .....	\$1,001	Hotel Dieu Shaver Health & Rehabilitation Foundation .....	\$1,000
Cambrian College - Financial Aid.....	\$1,000	Humber College - Financial Aid - Scholarships and Awards .....	\$1,000
Canadian Cancer Society.....	\$3,150	Humber College - Financial Aid - Scholarships and Awards .....	\$1,000
Canadian Red Cross .....	\$250	Jordan Historical Museum of the Twenty .....	\$735
Canadian Red Cross, Niagara Area Branches.....	\$928	Joseph Brant Hospital Foundation .....	\$751
Canadian Red Cross, Niagara Area Branches.....	\$103	Kristen French Child Advocacy Centre of Niagara .....	\$500
Cave Springs Camp Inc.....	\$735	Kristen French Child Advocacy Centre of Niagara .....	\$1,351
Central United Church of Port Colborne .....	\$3,030	La Cite Collegiale .....	\$1,000
Chorus Niagara .....	\$2,883	La Cite Collegiale .....	\$1,500
Chorus Niagara .....	\$11,000	La corporation de l'ecole polytechnique de Montreal .....	\$309
Chorus Niagara .....	\$3,661	Lambton College - Financial Aid .....	\$3,000
Chorus Niagara .....	\$500	Last Chance Horse and Pony Rescue .....	\$500
Church of the Transfiguration .....	\$10,272	Laurentian University .....	\$135
CityKidz Ministry - Hamilton Branch .....	\$5,417	Laurentian University .....	\$164
CNIB .....	\$845	Lincoln County Humane Society.....	\$3,500
Community Animal Allies of Niagara .....	\$7,000	Lincoln County Humane Society.....	\$1,000
Community Care of St. Catharines and Thorold .....	\$570	Lincoln County Humane Society.....	\$3,150
Community Care of St. Catharines and Thorold .....	\$500	Lincoln County Humane Society.....	\$845
Community Care of St. Catharines and Thorold .....	\$500	Lincoln Public Library.....	\$8,238
Community Care of St. Catharines and Thorold .....	\$584	Lincoln Public Library.....	\$3,000
Community Care of St. Catharines and Thorold .....	\$470	Literacy Council of Niagara West.....	\$3,000
Community Care of St. Catharines and Thorold .....	\$6,401	Literacy Council of Niagara West.....	\$2,059
Community Care of St. Catharines and Thorold .....	\$10,000	Loyalist College .....	\$1,500
Community Care of St. Catharines and Thorold (Niagara Nutrition Partners) .....	\$597	March of Dimes Canada .....	\$3,300
Community Care of West Niagara .....	\$6,591	Mayholme Foundation.....	\$62,336
Community Care of West Niagara .....	\$735	McMaster Children's Hospital Foundation .....	\$475
Community Care of West Niagara .....	\$3,000	McMaster University.....	\$500
Community Living - Grimsby Lincoln & West Lincoln .....	\$2,059	McMaster University.....	\$10,000
Community Living St. Catharines .....	\$407	McMaster University.....	\$1,000
Conestoga College - Financial Aid.....	\$1,000	McMaster University.....	\$500
Crohn's and Colitis Canada .....	\$2,375	McNally House Hospice .....	\$3,150
Crossroads Christian Communications Inc. ....	\$5,417	McNally House Hospice.....	\$5,452
Crossroads Christian Communications Inc. ....	\$5,417	McNally House Hospice.....	\$69,149
Cystic Fibrosis Canada - Niagara Chapter .....	\$3,150	Mission Services of Hamilton Inc. ....	\$5,417
Doctors Without Borders Canada .....	\$103	Mission Services of Hamilton Inc. ....	\$250
Doctors Without Borders Canada .....	\$928	Mohawk College .....	\$1,500
Dog Guides Canada.....	\$845	Multiple Sclerosis Society of Canada .....	\$845
Dog Guides Canada.....	\$4,594	Muscular Dystrophy Canada .....	\$10,850
Eastern Ontario Potcake Rescue .....	\$4,500	Nativity of the Holy Mother of God.....	\$46,783
Education Foundation of Niagara.....	\$7,022	NCDSB - Holy Name Catholic School .....	\$100
Education Foundation of Niagara.....	\$1,000	Newark Neighbours .....	\$500
Education Foundation of Niagara.....	\$1,950	Niagara Action for Animals.....	\$845
Education Foundation of Niagara.....	\$418	Niagara Action for Animals.....	\$10,000
Education Foundation of Niagara.....	\$1,128	Niagara Artists Company (Niagara Artists Centre).....	\$355



## 2017 DONOR DIRECTED GRANTS

Niagara Artists Company (Niagara Artists Centre).....	\$538
Niagara Artists Company (Niagara Artists Centre).....	\$821
Niagara Chapter - Native Women Inc. ....	\$268
Niagara Children's Centre.....	\$1,000
Niagara Children's Centre.....	\$928
Niagara Children's Centre.....	\$103
Niagara College - Financial Aid.....	\$1,000
Niagara College - Financial Aid.....	\$1,500
Niagara College - Financial Aid.....	\$1,500
Niagara College - Financial Aid.....	\$1,000
Niagara College - Financial Aid.....	\$1,000
Niagara College - Financial Aid.....	\$750
Niagara College - Financial Aid.....	\$750
Niagara College - Financial Aid.....	\$1,000
Niagara College - Financial Aid.....	\$1,500
Niagara College - Financial Aid.....	\$750
Niagara College - Financial Aid.....	\$1,000
Niagara College - Financial Aid.....	\$1,500
Niagara College - Financial Aid.....	\$1,000
Niagara College Foundation & Alumni Relations.....	\$1,000
Niagara Falls Humane Society.....	\$750
Niagara Falls Humane Society.....	\$500
Niagara Falls Humane Society.....	\$1,983
Niagara Foundation for Family and Children's Services.....	\$830
Niagara Foundation for Family and Children's Services.....	\$372
Niagara Foundation for Family and Children's Services.....	\$1,226
Niagara Foundation for Family and Children's Services.....	\$1,000
Niagara Foundation for Family and Children's Services.....	\$1,957
Niagara Health Foundation - GNGH Site.....	\$3,000
Niagara Health Foundation - Port Colborne Site.....	\$2,538
Niagara Health Foundation - St. Catharines Site.....	\$830
Niagara Health Foundation - St. Catharines Site.....	\$800
Niagara Health Foundation - St. Catharines Site.....	\$1,000
Niagara Health Foundation - St. Catharines Site.....	\$1,389
Niagara Health Foundation - St. Catharines Site.....	\$823
Niagara Health Foundation - Welland Site.....	\$454
Niagara Health Foundation - Welland Site.....	\$103
Niagara Health Foundation - Welland Site.....	\$1,393
Niagara Historical Society - Museum.....	\$500
Niagara Land Trust.....	\$1,226
Niagara Life Welland Centre o/a Elisha House Pregnancy & Family Support Centre.....	\$7,233
Niagara Peninsula Conservation Foundation.....	\$2,883
Niagara Peninsula Conservation Foundation.....	\$484
Niagara Region Sexual Assault Centre ( CARSA Inc. ).....	\$447
Niagara Region Sexual Assault Centre ( CARSA Inc. ).....	\$845
Niagara Resource Service for Youth (The RAFT).....	\$210
Niagara Resource Service for Youth (The RAFT).....	\$932
Niagara Resource Service for Youth (The RAFT).....	\$11,000
Niagara Symphony Association.....	\$714
Niagara Symphony Association.....	\$235
Niagara Symphony Association.....	\$2,883
Niagara Symphony Association.....	\$11,000
Niagara Youth Orchestra.....	\$2,883
Niagara-on-the-Lake Public Library.....	\$941
Niagara-on-the-Lake Public Library.....	\$4,395
Northern College - Financial Aid.....	\$1,000
Ontario Brain Injury Association.....	\$5,000
Ontario Lung Association - Branch serving Niagara.....	\$928
Ontario Lung Association - Branch serving Niagara.....	\$103
Open Arms Mission of Welland Inc.....	\$7,233
Osteoporosis Canada - Niagara Chapter.....	\$845
Pathstone Foundation.....	\$800
Pathstone Foundation.....	\$642
Pathstone Foundation.....	\$847
Pathstone Foundation.....	\$246
Pathstone Foundation.....	\$5,000
Pathstone Foundation.....	\$71
Pathstone Foundation.....	\$1,500
Pelham Public Library.....	\$191
Port Cares.....	\$1,250
Port Nelson United Church.....	\$500
Project S.H.A.R.E. of Niagara Falls Inc.....	\$500

Queen's University.....	\$1,500
Queen's University.....	\$5,000
Red Roof Retreat.....	\$372
Regional Niagara Upper Canada Lodge (Regional Municipality of Niagara).....	\$7,100
Rotary Club of Lincoln Foundation.....	\$306
Ryerson University.....	\$1,500
Salvation Army Community and Family Services - Hamilton/Wentworth.....	\$500
Seneca College.....	\$500
Shaw Festival Theatre Foundation, Canada.....	\$11,000
Shaw Festival Theatre Foundation, Canada.....	\$2,000
Sleeping Children Around the World.....	\$3,587
Sleeping Children Around the World.....	\$200
St. George's Anglican Church.....	\$500
St. Giles Presbyterian Church.....	\$1,253
St. John the Theologian Ukrainian Catholic Church.....	\$46,783
St. Mark's Historic Properties Foundation, c/o St. Mark's Church.....	\$569
St. Therese of Lisieux Church.....	\$5,076
St. Therese of Lisieux Church.....	\$428
Stamford Lane United Church.....	\$2,000
Sts. Cyril & Methodius Church.....	\$46,783
The Adult Literacy Council of Greater Fort Erie.....	\$847
The Hospital for Sick Children Foundation (SickKids Foundation).....	\$475
The Hospital for Sick Children Foundation (SickKids Foundation).....	\$2,034
The Royal Canadian Legion Thorold (Ontario No. 017) Branch Poppy Fund.....	\$500
The Salvation Army Community & Family Services - Niagara Region.....	\$103
The Salvation Army Community & Family Services - Niagara Region.....	\$928
The Salvation Army Niagara Orchard Community Church.....	\$500
The Salvation Army St. Catharines Community & Family Services.....	\$800
The School of Restoration Arts at Willowbank.....	\$500
Town of Lincoln - Jordan Historical Museum.....	\$2,059
Trent University.....	\$600
Trent University.....	\$1,000
Ukrainian Canadian Congress Charitable and Educational Trust.....	\$46,783
Ukrainian Canadian Social Services (St. Catharines) Inc.....	\$46,783
United Way of Burlington and Greater Hamilton.....	\$400
United Way of Niagara Falls and Greater Fort Erie.....	\$1,000
United Way of South Niagara.....	\$103
United Way of South Niagara.....	\$1,393
United Way of St. Catharines and District.....	\$1,000
University of Guelph.....	\$2,000
University of Ottawa.....	\$600
University of Ottawa.....	\$600
University of Ottawa.....	\$1,500
University of Toronto.....	\$1,000
University of Waterloo.....	\$300
University of Waterloo.....	\$1,000
University of Waterloo.....	\$1,500
University of Waterloo.....	\$1,500
University of Waterloo.....	\$600
University of Waterloo.....	\$5,000
University of Waterloo.....	\$1,500
University of Windsor.....	\$1,500
Urban Wildlife Care.....	\$1,000
VON Canada - Ontario Branch - Niagara Site.....	\$2,883
Wellspring Niagara Cancer Support Foundation.....	\$2,342
Wellspring Niagara Cancer Support Foundation.....	\$830
West Lincoln Community Care.....	\$529
West Niagara Agricultural Society.....	\$2,170
Women's Place of South Niagara Inc.....	\$407
Women's Place of South Niagara Inc.....	\$500
YMCA of Niagara.....	\$377
YMCA of Niagara.....	\$800
YMCA of Niagara.....	\$1,000
YMCA of Niagara.....	\$2,000
YMCA of Niagara.....	\$20,000
YWCA Niagara Region.....	\$1,000
YWCA Niagara Region.....	\$5,000
YWCA Niagara Region.....	\$780
YWCA Niagara Region.....	\$1,500

**\$1,031,578**

# celebrating our DONORS

## DAVID HOWES WAS PASSIONATE ABOUT HIS HOME TOWN.

The workers at his business, their families, the athletes, and the educational and health institutions that all helped make both Lincoln Fabrics and the Niagara Region thrive inspired and fuelled Howes too. That's why his decision to leave one of the biggest philanthropic gifts ever given in Niagara – and now entrusted to the Niagara Community Foundation – makes sense to his spouse, Susanne Di Lalla.

Di Lalla, who says the decision was Howes' alone, also says the \$18-million gift fits perfectly with the love, dedication, and gratitude Howes felt for his Niagara home.

The size of Howes' gift, the timing of the announcement (in his will), and its intended beneficiaries (post-secondary education, health care, education, research facilities and humanitarian issues), all match the character of the man and make perfect sense, she said. Ironically, Howes never intended to make Niagara his home, but after returning – briefly, he thought – to help his father, Stewart, with the family business, he ended up staying. And once he had made the decision to stay, he became utterly devoted. "They were his family, they were his friends," she said, of the people who worked at Lincoln Fabrics. "He never had any family of his own and he would never stop, at any level, to make sure everyone was okay."

That dedication extended to the rest of Niagara. "He was so supportive of everybody," she recalls of the man who loved to joke and laugh, but who also was intensely private, and who made significant contributions throughout his lifetime of both time and money to causes both public and private.

"He was such a loyal individual, and he cared for the community so much," she said. He had attended other schools, but devoted time and resources to Brock University. St. Catharines was a GM town, so he only ever drove GM vehicles. He didn't like a spotlight shone on him, but he was willing to speak up for a cause he believed in. He had a bellowing voice and could present with a gruff demeanor, but underneath he was a "teddy bear" – although he implored Di Lalla not to let on that she knew. "He was there for the underdog too."

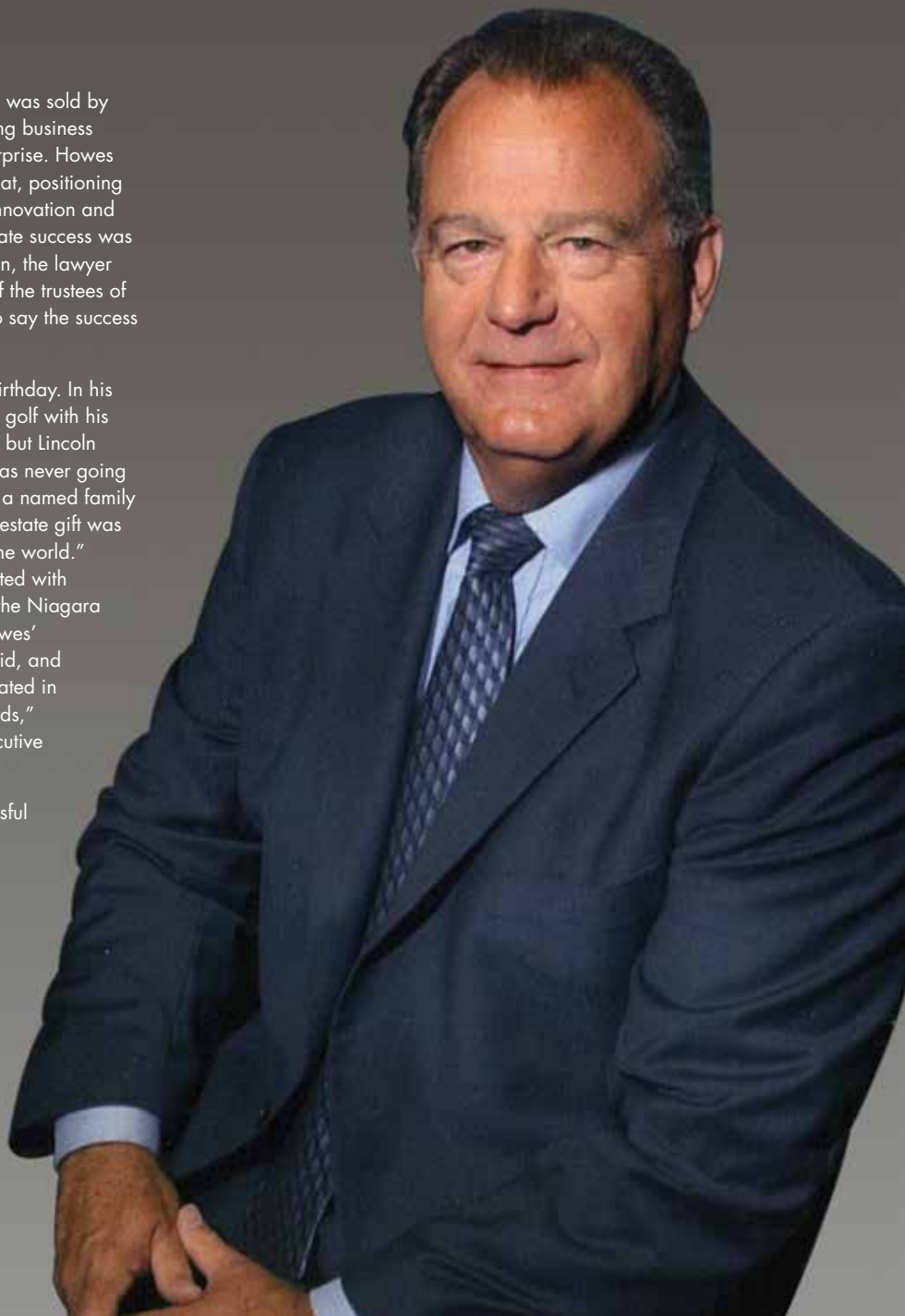


Lincoln Fabrics, the Port Dalhousie textile company that was sold by his estate after his death but which remains a functioning business in the Niagara Region, was not always a thriving enterprise. Howes took dramatic risks and worked tirelessly to keep it afloat, positioning it in a niche, global industry which required constant innovation and investment to remain competitive. Lincoln Fabrics' ultimate success was due to the leadership Howes provided, said Rob Wilson, the lawyer who handled his final wishes and who serves as one of the trustees of the David S. Howes Foundation, but Howes would also say the success was due to the dedication of the employees.

Howes died of cancer in 2015, just short of his 75th birthday. In his later years, he travelled the globe with Di Lalla, played golf with his buddies, and doted on the couple's five grandchildren, but Lincoln Fabrics remained his passion, Di Lalla said, and "he was never going to retire." Howes and Di Lalla had already established a named family fund with the Niagara Community Foundation, but the estate gift was as much a surprise to Di Lalla "as it was to the rest of the world." Wilson and the executors of Howes' estate were entrusted with implementing Howes' wishes. Their decision to turn to the Niagara Community Foundation to manage the task fits with Howes' appreciation for efficiency and competence, Wilson said, and speaks to the confidence Howes and Di Lalla demonstrated in making the earlier gift. "We are honoured beyond words," said Bryan Rose, Niagara Community Foundation Executive Director.

Howes did not have children of his own, but his successful business – and now this gift – serve as his legacy, both Di Lalla and Wilson said. Howes' discomfort with attention may explain why he told no one of his plan, but the legacy is one of which those who knew and loved Howes are now proud. "His contributions to community efforts were because he loved it," Di Lalla said. "He loved this community, and he wanted to see it prosper and grow."

*Photos, opposite page: Images from the David S. Howes gift announcement ceremony.*



## GRADE-A ASSISTANCE

Getting into college or university requires more than achieving the right grades. Finding the money to attend can be an incredible source of stress for students and their families.

The Education Foundation of Niagara helps to alleviate the financial burden of post-secondary education start-up costs for high school graduates, with new bursary funds managed by the Niagara Community Foundation.

Starting this year, the **EDUCATION FOUNDATION OF NIAGARA BURSARY FUND FOR DISTRICT SCHOOL BOARD OF NIAGARA (DSBN) STUDENTS** will assist students annually with expenses such as books, technology, transportation, and daily living while at college or university.

The bursary funds, which also allow for local donors to establish a named bursary within it them, builds on the Education Foundation's long history of helping DSBN students thrive and succeed every day. To date, six Education Foundation funds managed by the Niagara Community Foundation bolster programs to help students, ranging from arts education in local schools to providing students with basic necessities, including access to basic necessities such as nutritious food and even warm coats and boots to get them through winter.

"The Niagara Community Foundation is a respected, incredible organization that benefits the entire community, and our funds here benefit students throughout Niagara," says Cindy Paskey, Education Foundation of Niagara executive director. "Everything is in place to ensure the funds are well-managed and used for the purposes intended."

## ALL IN THE FAMILY

Being able to share with others is great, but inspiring others to share has the potential for even greater impact.

For Dr. Jane Parr and Craig Spiegel, creating the **DR. JANE PARR AND CRAIG SPIEGEL FAMILY FUND** with the Niagara Community Foundation was a way to both keep the memory of loved ones alive and to encourage others to give back to their community.

Parr, an optometrist, who served patients in Port Colborne and Dunnville for decades, originally created a memorial scholarship in 1999 at Port Colborne High School in the name of her father, Gilbert VanViegen, a civic-minded builder and community leader who had died that year.

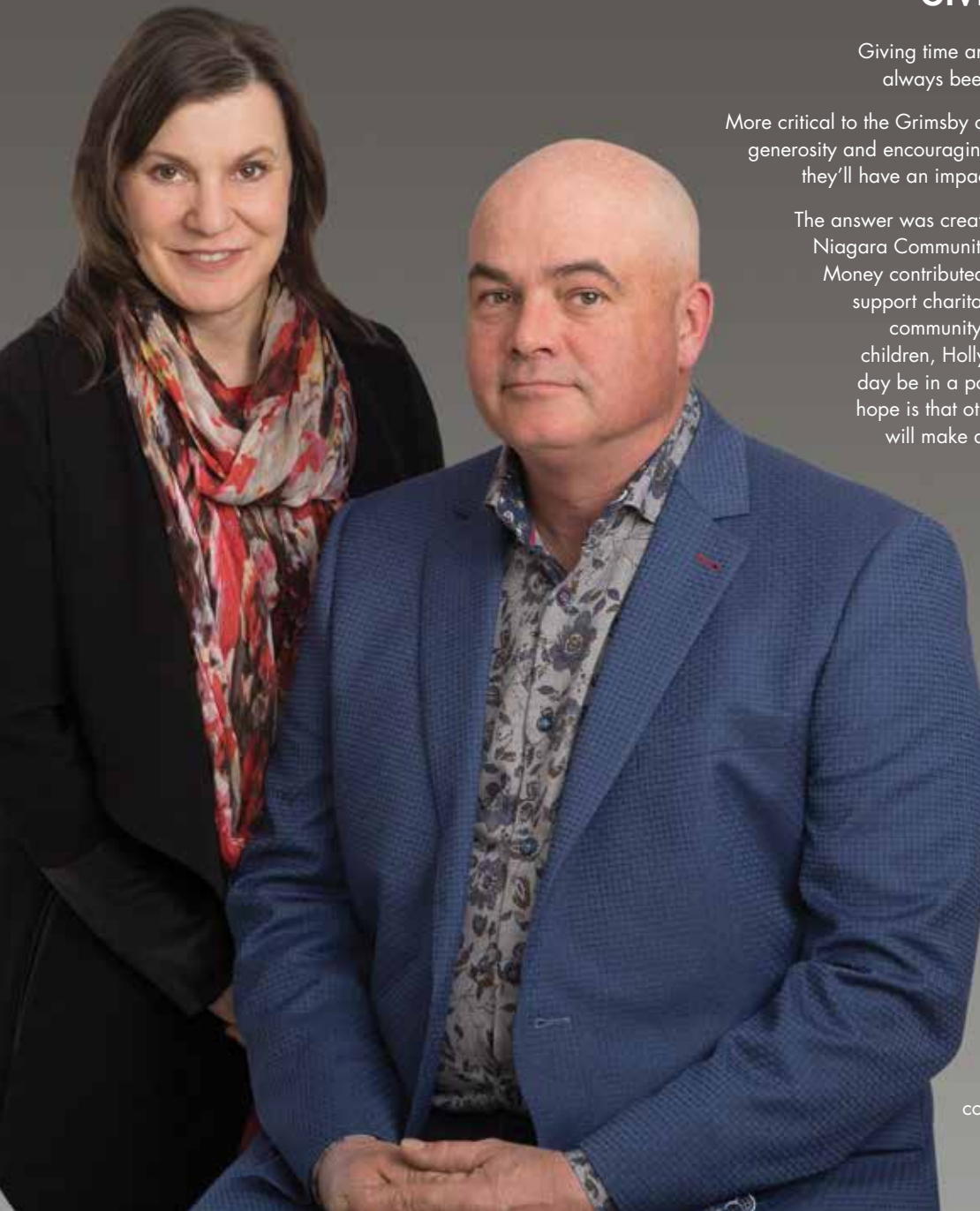
Her then-teenage son was a student at Port Colborne High when his grandfather died, and Parr saw the scholarship as a way to encourage post-secondary education and give back to the community where her family had established strong roots. In 2006, when her brother Conrad VanViegen also died young, Parr renewed her commitment to encouraging post-secondary education and to keeping the VanViegen name alive.

Now more than a decade later, Parr is ensuring that the scholarship lives on by establishing a permanent fund that will one day – either through regular contributions or upon her death – be endowed with sufficient resources to keep on giving in the VanViegen name.

For Parr and her husband, Craig, the long-term commitment is a way to show their children and others how easy and important it is for ordinary people to give, and, by creating their own fund, they will be able to support additional causes that "are dear to my heart – Community Living and Special Olympics." Parr has a special needs sister who lives in the Netherlands and it has always been a goal of hers to volunteer with the Special Olympics organization in the not-too-distant future. In the past, she has performed volunteer eye exams at the now closed Huronia Regional Centre, as a way to demonstrate their commitment to the need.

Having an effective and attainable way to support the causes that are dear to them long after they are gone "feels great," says Parr. "We can support the next generation of students and Special Olympics athletes, and we are showing our children how important it is to give back to your community."





## GIVING FOR OUR FUTURE

Giving time and money to causes that resonate have always been important to Ruth and William Todd.

More critical to the Grimsby couple is ensuring the longevity of their generosity and encouraging a ripple effect. How can they ensure they'll have an impact on their community years from now?

The answer was creating the **TODD FAMILY FUND** within the Niagara Community Foundation's Town of Grimsby Fund. Money contributed each year to their named fund would support charitable organizations in the west Niagara community. It would also set an example for their children, Holly, 19, and Garrett, 16, who could one day be in a position to join their parents' efforts. The hope is that others will join, and our collective efforts will make a difference in the Grimsby community.

"We do a lot of volunteering and gifting. You see the results in the moment but you're not always sure of the long-term impact," Ruth explains.

"This was another way to give back and ensure it was longer-lasting. It was also a way for our smaller contribution to join with others and have a larger impact."

More than that, Ruth and William know they're establishing a legacy with an organization that has an unshakeable reputation of doing right by both donors and the causes being supported. That gives the Todd's peace of mind about how their fund will be used, and, most importantly, its sustainability.

"When you're thinking about the future, you want to be attached to an organization that's going to be there," Ruth says. "We also liked the connection to our local area. You can fill needs within your own community."

## LEADING BY EXAMPLE – NOT JUST A CORPORATE MOTTO

“Count us in!” This was the enthusiastic response of Vintage Hotels in 2016 when hearing about the new **NIAGARA-ON-THE-LAKE FUND**. Bob Jackson, CEO of Vintage Hotels, leads the dynamic and successful hotel group. He stepped up to the plate and immediately committed to be a Founding Member. Bob’s lead as the initial Founding Member inspired others in Niagara-on-the-Lake. Vintage Hotels has consistently been actively involved in the community so he saw an endowed fund as “a very natural thing to do” with the newly formed NOTL Fund.

Being a good corporate citizen has always been part of Vintage Hotels’ philosophy and they position their team in the best possible way. Vintage Hotels sees the donation as a long term way to contribute to different areas of the community that they select through the interest from the capital of their donation. The team at Vintage Hotels enjoys being involved in these key decisions as noted in their Service First Team Pillars and Core Values along with their Service First Champion Award. Social Responsibility to the Community is encouraged and rewarded by being included in their service excellence standards.

While building their well-deserved and well-awarded reputation in the hospitality world both nationally and internationally, Vintage Hotels has demonstrated their strong feelings about ensuring that Niagara remains a healthy and vibrant community. They have become a major part of Niagara-on-the-Lake and they continue to share their efforts and successes with the Town by contributing to the NOTL Fund.

Vintage Hotels are currently owned by the Lais Group of Companies, operating under Lais Hotel Properties Limited falling into two main groups: Vintage Hotels & Niagara’s Finest Hotels.

Leading by example! This is etched in Vintage Hotels’ core philosophy and will keep them being held in high esteem and remembered as a good corporate citizen through their desire to always give back to the community that they live and work in.

## A HOLE IN ONE

Choosing causes to support to can be daunting because there’s not one that isn’t worthy.

For years a group of Niagara business colleagues, called GOATS, dedicated themselves to raising money for muscular dystrophy, first by working phones in a Hospital for Sick Children telethon some 35 years ago, and later by hosting annual golf tournaments.

Over time, the GOATS determined they’d have greater impact donating the proceeds of their yearly tee-offs to local causes. As the GOATS golf tournament grew, the group opted to focus on fundraising on the fairway and turned to the Niagara Community Foundation to manage and distribute the proceeds.

In 2010, the group established the **CANADA GOATS ENDOWMENT FUND** with the Foundation. Every year since, half the money they raise golfing goes to building the endowment. The rest goes to supporting Niagara charities.

“The driver for the GOATS was the Niagara Community Foundation could determine where the funds are most needed and where they should go,” says John Potts, GOATS member and a Foundation ambassador.

The GOATS’ goal is to grow the fund to \$200,000, and with more than \$164,000 in their endowment already, they’re well on their way. Niagara stands to benefit for years to come.

“Whenever the tournament falls away, there will still be an endowment to continue granting money in the community through the Niagara Community Foundation,” John says.

## REACHING OUT

It's a relationship that started with a simple hello.

In 2016, David Murray reached out to Niagara Community Foundation Executive Director Bryan Rose just to congratulate him on his appointment to the Foundation's leadership role. But soon after, David and his wife Elizabeth Surtees established a fund in their name to benefit local health and education charities.

The Niagara-on-the-Lake couple were looking for someone to handle their annual donations after their Toronto-based fund manager started dropping hints they should take advantage of recent capital gains. He suggested they consider finding an institution to which they could contribute a capital donation, have their donation administered and nurtured by that institution, and annually direct where their funds be disbursed to assist community needs. Their fund manager pointed out that this approach enabled them to take advantage of the charitable donation tax credit gradually. The Niagara Community Foundation immediately came to mind.

So in 2017 the couple set up the **MURRAY-SURTEES FUND** with the NCF. A foundation-administered fund allows David and Elizabeth a say in how their donations are used but with much "less red tape" than relying on the fund manager to follow their directions. "It's our policy," Elizabeth says. "We like to support whomever we choose."

Having a dedicated fund growing under the Foundation's watch also means the couple can give whenever the need arises.

"If, at any time, Bryan were to call us and say there was a special need for something, would you consider donating, we would probably say yes," David says. "That's the beauty of it."



# ENDOWMENT FUNDS CONTINUE TO GROW

The Foundation has a different face to each of our donors. Their funds can support a particular cause, community or charity and once a fund is opened anyone can make gifts of any amount, in any way, at any time. Donations can also be made in honour or memory of a loved one.

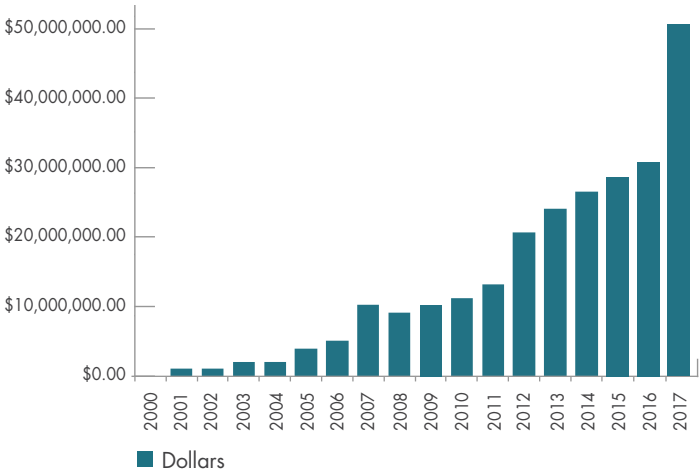
There are many ways to make a gift to the Foundation. These include cash, securities, bequests, special event proceeds, property, and insurance policies. Our role is to work with donors to ensure that their charitable intent is achieved through their gift.

There are a number of options for donors when considering how long they would like their fund to be active. Most of our funds are held in perpetuity, where the capital is preserved and a portion of the annual earnings on the fund are allocated to charities. Funds can also be held for a specific length of time or established to have a fixed annual distribution. In these later two examples both the capital and the earnings are distributed.

However, with increasing demands for support, it is important to take the time to determine how to make ‘the best gift’, a gift that provides maximum benefits to the community

that is within one’s capacity to give. We strongly advise donors to speak to their family, lawyer, accountant or financial planner to determine the best way to make a gift that maximizes their tax and estate goals.

## ENDOWMENT FUND GROWTH



## Smart and Caring Community Funds

In 2012 we created a group of sector-based funds that support current and emerging community needs. We called these our Smart and Caring Funds in recognition of the vision of Governor General David Johnston, the patron of Community Foundations of Canada, to build smart and caring communities based on three pillars: innovation, philanthropy and volunteerism.

Our current funding priorities include: initiatives that align with priorities identified in the Living in Niagara Report, resources to help charities become more efficient and effective and leadership development and training opportunities for the voluntary sector.

Donors interested in supporting future community needs are able to make a contribution to the Niagara Fund or one of the local community funds listed below. Grants from community funds are restricted to charities providing programs and services in those municipalities.

Donors can create a named fund within any of our community funds or our Smart and Caring funds with a gift of \$5,000, which can be gifted either on an annual or monthly basis.



## Niagara Funds

- Alice Downie-Bacon Community Fund
- Andrea Douglas Fund
- Beth & Murton Seymour Family Fund
- Branscombe Families Fund
- Canada GOATS Endowment Fund
- Charron Family Fund
- Crawford Smith & Swallow Fund
- Dr. T. W. & Muriel O'Mulvenny Fund
- Elvi Vicary Fund
- Fallview Casino Resort Fund
- George & Doris Shepherd Family Fund
- Jack and Nora Walker Fund
- Janet St. Amand & Doug Herod Fund
- \* Jo & Norm Opperman Fund
- John & Jan Potts Fund
- JP Fund
- Judith Barker Fund
- June Munro Fund
- Marchand Kruczynski Family Fund
- Marv Kriluck Fund
- Meridian Credit Union Fund
- Niagara Fund
- Niagara Road Supervisors Association Fund
- Regional Chair's Smart and Caring Community Fund
- \* Rose Family Fund
- Waters & Meredith Fund
- Woodhead Family Fund

## Fort Erie Funds

- Facca-Mindorff Family Fund
- Fort Erie Fund
- Little-Green Family Fund

## Grimsby Funds

- Grimsby Community Fund
- Grimsby Benevolent Fund
- \* Jim Howden & Ruth Moffatt Fund
- \* Mark & Jean Brohman Family Fund
- Pettigrew Family Fund
- Todd Family Fund

## Lincoln Funds

- Holmes Barrett Family Fund
- Hopkins Hill Family Fund
- Lincoln Community Fund
- Lincoln Chamber of Commerce Fund
- \* Mark & Jean Brohman Family Fund
- \* Paul & Leslie MacPherson Family Fund
- \* Prudhomme-Beatty Family Fund

## Niagara Falls Funds

- Americana-DiBellonia Family Fund
- Courtyard Marriott Hotel Fund
- DiCienzo Family Fund
- \* Ed & Jessica Friesen Fund
- Embassy Suites Hotel Niagara Falls Fallview Fund
- Hay Family Fund
- Hilton Niagara Falls Fallview Fund
- Niagara Falls Community Fund
- Ripley's Great Wolf Lodge Fund

## Niagara-on-the-Lake Funds

- \* Debi Pratt Fund
- \* Joan & Larry Bourk Fund
- Niagara-on-the-Lake Community Fund
- \* Vanessa & Evan Brazeau Fund
- Vintage Hotels Niagara-on-the-Lake Community Fund

## Niagara West Funds

- Bruce & Bonnie Wallace Family Fund
- Ericway Tire Community Fund
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- M. K. Rittenhouse Family Fund
- Niagara West Community Fund

## Pelham Funds

- Adamson Family Fund
- Augustyn Berkhout Family Fund
- Pelham Community Fund

## Port Colborne Funds

- Brend Butler Family Fund
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- Gary Talosi Thanks Port Colborne Fund
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- Marsh Family Fund
- Port Colborne Community Fund
- Port Colborne Downtown Cruiser's Assoc. Fund
- Tom and Mary Cronin Fund
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## St. Catharines Funds

- Burgoyne Doolittle Fund
- Caplan Family Anniversary Legacy Fund
- Durward Jones Barkwell
- Investing in St. Catharines Youth Fund
- Jean Whitty Family Fund
- Newman Rigby Family Fund
- St. Catharines Fund
- Whyte Family Endowment Fund

## Thorold Funds

- Mario and Rachel De Divitiis Fund
- Thorold Community Fund

## Wainfleet Funds

- Robson Family Fund
- Wainfleet Community Fund

## Welland Funds

- Angie & Gary Talosi Family Fund
- Groom Jensen Family Fund
- Neill Terry Family Fund
- Peter & Andrew Papp Family Fund
- Raymond & June Harper Fund
- Welland Community Fund
- Welland Mayor's Children & Youth Fund

## Smart & Caring Community Impact Funds

Donors are passionate about causes that matter to them, ranging from education and the environment to children, culture, health and welfare. Since the Foundation supports all charitable sectors we have the ability to connect donors' passions with local organizations through the creation of Smart & Caring Community Impact Funds. These funds can be opened with \$25,000 which can be pledged over a five-year period. Once a fund is opened, donations can be added to any of the funds listed below. Named funds can be created within an existing Smart & Caring Fund with a \$5,000 donation.

## Animal Welfare

- **Smart & Caring Animal Welfare Fund for Niagara**
- Earl & Ida Clarke Animal Welfare Fund
- LetPets Live Fund
- Niagara Falls Humane Society Shelter Enhancement Fund

## Children & Youth

- **Smart & Caring Children & Youth Fund for Niagara**
- Ann Fast Fund
- Anna Angelone Endowment Fund
- Big Brothers Big Sisters Endowment Fund
- Brend Butler Family Fund 4
- Brock Leaders Citizenship Society Fund
- CARMI for Kids Fund
- David and Susanne DiLalla Howes Family Fund
- Gark Family Fund
- Hammond Family Fund
- Investing in St. Catharines Youth Fund
- Kristen French Child Advocacy Centre Niagara Fund
- Niagara Foundation for Family and Children's Services Endowment Fund
- Ontario Endowment for Children & Youth in Recreation
- Pathstone Foundation Fund
- Robert A. Lavelle Memorial Fund
- Secord-Reid Family Fund
- Summer Camp Fund
- \*Touch a Truck Niagara Early Childhood Literacy Fund
- Welland Flatwater Fund
- Young Children Priority First - Kiwanis Fund

## Culture

- **Smart & Caring Cultural Endowment Fund for Niagara**
- Alice Crawley Endowment Fund for Women Artists' Fund
- Arthur Dalfen Fund
- Arts & Heritage Community Development Fund for the Old Town of NOTL and Village of Queenston
- Audrey Shimizu Memorial Fund
- Carol Leppert Music Fund for Steele Street School
- Carol Leppert Music Fund for Winger Public School
- \* Christopher John Slater Fund
- Grimsby Museum Endowment Fund
- Mayholme Foundation Fund

- Niagara Children's Chorus Fund
- NOTL Library Michael Dietsch Fund
- NOTL Public Library Fund
- Niagara Symphony Assc. Endowment Fund
- Pelham Public Library Endowment Fund
- Regan Peacock-Fung Memorial Art Fund
- Robert Cooper Choral Scholars Fund
- Smylski-Attenborough Fund
- Valentina McLeod Fund

## Education & Leadership

- **Smart & Caring Education & Leadership Fund for Niagara**
- Anonymous Fund
- Adult Literacy Council of Greater Fort Erie Fund
- Alice Downie-Bacon Designated Fund
- \* Ann Speedie Niagara Concerts Memorial Fund
- \* Aspiring Healthcare Leaders in Niagara Bursary Fund
- \* CFUW St. Catharines 100th Anniversary Scholarship Fund
- CFUW St. Catharines Endowment Fund
- \* CFUW Welland & District Charitable Trust Scholarship Fund
- Children of Niagara's Migrant Workers Award Endowment Fund
- Chuck & Judy Smith Bursary Fund
- DiCienzo Family FT Fund
- Education Foundation of Niagara Bursary Fund for DSBN Academy Students
- Education Foundation of Niagara Bursary Fund for DSBN Students
- Education Foundation of Niagara Fund
- Education Foundation of Niagara Poverty & Emergency Relief Fund
- Ferrara Kennedy Student Award Fund
- Gene Luczkiw Spirit of Enterprise Endowment Fund
- George and Jackie Thomas Bursary
- Groch Family Fund
- \* Hummel Family Fund
- Jessica Potts Fund
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- Kuska Family Memorial Student Awards Fund
- Larry and Olga Andrusiw Paramedic Award Fund
- Iycett Family Fund
- \* Monika and Darren Pries-Klassen Fund
- \* Michael & Paula Mann Family Fund
- Niagara Engineering Week Scholarship Fund
- Niagara Falls Big Brothers Big Sisters Scholarship Fund
- Niagara Peninsula Energy Award Fund
- Palmieri Family Fund
- \* Rotary Club of St. Catharines Fund
- Sunday in the Parks Fund
- Zonta Club of Niagara Falls Fund

## Environment

- **Smart & Caring Environment Legacy Fund**
- Bert Miller Nature Club Endowment Fund
- Conservation Niagara Fund
- Enbridge Awaire Fund
- Fengate Realty Group Environment Fund

- Fort Erie Conservation Club Fund
- Friends of Fort Erie's Creeks Fund
- Harry Deline Fund
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- Nelson Aggregate Environmental Fund
- Niagara CAER Group Fund
- Niagara Land Trust Endowment Fund
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- Walter & Sons Excavating Environment Fund

## Health & Well-being

- **Smart & Caring Health & Well-being Fund for Niagara**
- \* Barbara Gale Seniors & Youth Fund
- Bethlehem Housing and Support Services Endowment Fund
- \* Billes Family Future Housing Fund
- Brend Butler Family Fund 2
- Chris Lackenbauer Memorial Fund
- Colleen Kiers Memorial Fund
- Community Care - St. Catharines Thorold Fund
- Community Living St. Catharines Endowment Fund
- Ed and Rosalie Vasso Fund
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- Joan E. Marlow YWCA Endowment Fund
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- Mayflowers Fund
- McNally House Endowment Fund
- Morabito Family Fund
- Necklaces of Hope Foundation
- Niagara Aboriginal Advancement Fund
- Niagara Survivor Services Fund
- Patrick & Nancy McNally Family Fund
- Rankin Cancer Run Foundation
- Red Roof Retreat Fund
- Upper Canada Lodge Auxiliary - Constable Family Fund
- Welland Hospital Foundation Endowment Fund
- Wellspring HOPE Fund
- Women's Place of South Niagara End. Fund

## Spiritual

- Assunta and Cesare Bonelli Fund
- Church of the Transfiguration Education Fund
- St. Giles Presbyterian Church CEVO Fund

## Donor Advised Funds

These funds appeal to donors interested in creating their own family foundation as they enable the donor to

have ongoing participation in the selection of charities benefitting from their fund. Donors can also name successor advisors so that their legacy is continued by future generations. These funds can be established with a minimum donation of \$25,000.

- Andreana Family Trust
- Beatties Basics Anniversary Fund
- Bluevalley Foundation
- Brunatti-Dyment Fund
- Bush Family Fund
- Cornelius & Helen Vanden Top Charity Fund
- \* David S. Howes Fund
- Donald & Barbara Fraser Family Endowment Fund
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- \* Murray-Surtees Fund
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- Stephen Souter Memorial Fund
- Stewart Family Endowment Fund
- Sullivan Mahoney Endowment Fund

## Donor Designated Funds

These funds provide on-going annual support to charities important to donors and their families. The minimum donation is \$10,000 per charity to be supported.

- Anonymous
- Adrie's House of Hope Fund
- Art & Val Fleming Fund
- Bob Gale Recreation Fund
- Brend Butler Family Fund 3
- Caughill Family Fund
- Cornelius & Helen Vanden Top Charity Foundation
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- \* May Crane Fund
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- \*Niagara Children's Centre Fund
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- Semley-McKeown Family Fund
- Smithville and District Lions Club Fund
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- Troup Family Memorial Fund
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\* Represents funds created in 2017

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## MEMORIAL AND TRIBUTE GIFTS

During 2017, gifts were received by the Foundation in honour or in memory of the following individuals:

Wayne Abbott, Ken Atkinson, Dave Augustyn, Beverley Ballett, Michael Beckermann, Larry Bracken, Frank Caplan, Coal, Nick Di Flavio, John Difiore, Goldie Duncan, Carmela Fabiano, Arthur D. Fleming, Donald M. Fraser, Alan and Margaret Goddard, Murray Herr, Muriel Hodgkins, Vicki Little, Christian Lustig, Ian Milne, Milou and Blondie, Mary Minaker, Katie Oswald, Cecile Philippe, Daniel Reale, Lloyd Alexander Riche, Rosenberg, Marie (Florence) Semley, Dr. Allan Sharp, Helen Sherk, Michael Sillberg, Brian Smylski, Howard V. Staff, Kathryn M. Stewart, Ron Swayze, Timothy Traquair, Virginia Wilcox

## HERITAGE SOCIETY

Members of the society have included the Foundation in their estate plan making a real difference in our community's future. We would like to thank the following people who have named the Niagara Community Foundation in their will, donated a life insurance policy or will be donating the proceeds from their RRSPs:

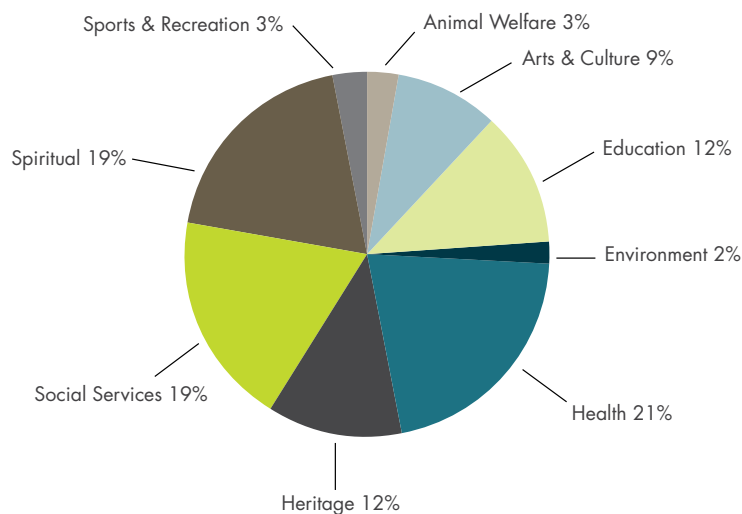
Debra Attenborough, Chris Bingham, Norm Bradshaw, Ann-Louise Branscombe, Barbara Bucknall, Elizabeth Connor-Elliott, John P. Cunningham, Moira Davidson, Barbara Davidson, Daniel Davidson, Rachel Delaney, Roger Digou, Sandra Durward, Robert C. Gibson, Roman Groch, Harvey & Mary Jane Hall, Bob & Esther Hougham, Brad Hutchings, April Jeffs, Alan Jostman, Anne Kemp, Sharon Kirk, Ann Koppel, Rob & Christine Long, Mary Mauriello, Greg and Rena McDonald, Daryl Novak and Brian Harrison, Liz Palmieri, Cindy Paskey, Kathleen Summers and John Picken, Liz Powell, Mora Richmond, BJ Romans, Annemarie Rosenberg and Stephen Levy, David & Mally Simpson, Marc and Debbie Slade, Betty-Lou Souter, Dave and Sonia Stevenson, Virginia Stewart, Graham & Pearl Sweeting, Carl and Eileen Urben, Leona Vaillancourt, Robert and Kathie Welch, Doug and Sally Whyte, Hedy Ziesmann, Debbie Zimmerman

# FINANCIAL HIGHLIGHTS

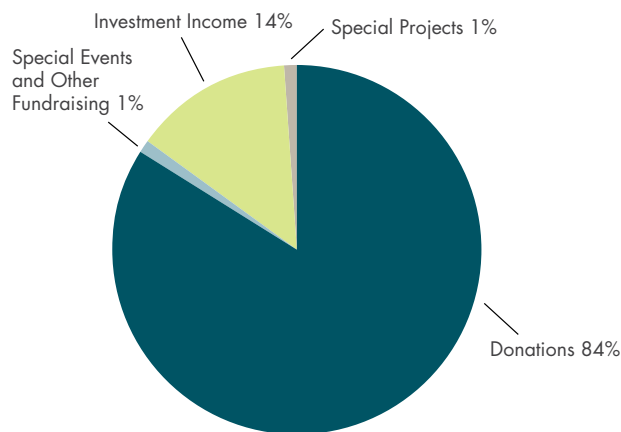
For the Year End December 31, 2017

	2017	2016	2015
Total Assets	\$50,618,663	\$31,610,499	\$28,967,043
Gross Fundraising and Event Revenue	\$282,101	\$257,438	\$249,995
Total Donations	\$17,789,926	\$2,740,250	\$852,811
Total Revenue	\$21,511,634	\$5,011,267	\$3,613,545
Total Grants	\$1,300,524	\$1,309,871	\$1,473,494
Total Charitable Programs	\$139,595	\$124,952	\$100,573
Total Special Projects	\$91,098	\$51,171	\$50,227
Total Fundraising Expenses	\$218,630	\$246,539	\$185,848
Total Administrative and Governance Expenses	\$427,369	\$432,583	\$395,459
Total Endowments	\$49,440,071	\$30,649,093	\$28,731,520
% of Admin/Governance to Total Endowment	0.86%	1.41%	1.38%
% of Fundraising Expenses to Total Endowment	0.44%	0.80%	0.65%

## ALLOCATION TO GRANTS & CHARITABLE PROGRAMS



## SOURCE OF REVENUE \$21,511,634



To view the audited financial statements, please visit: [www.niagaracommunityfoundation.org/about-us](http://www.niagaracommunityfoundation.org/about-us)

# FINANCIAL AND GOVERNANCE HIGHLIGHTS

## Governance

The Board’s role is to set policy and to question, scrutinize and monitor the management of the Foundation’s affairs. It is a role of governance as opposed to operational management. The Board’s primary responsibility is to build and ensure sound management of the Foundation. It oversees the Foundation’s management and ensures that the affairs of the Foundation are being conducted in a manner that achieves its goals, consistent with the Foundation’s mission. The Board meets five times throughout the year plus a special meeting for strategic planning. The Role of Board and Executive and the Scope of Authority policies are in place to delineate responsibility between board and staff. The Board has also adopted a Code of Ethics and Confidentiality policy for board, staff and volunteers.

## Operations

The Foundation’s staff is led by the Executive Director, who reports to an independent board of directors. Operating costs include asset development, charitable activities, special projects, administration and governance. Once again, the Foundation also received funding in 2017 from the Niagara Region to support two Convener positions for the Niagara Prosperity Initiative. This funding enables us to bring community groups together to guide poverty reduction initiatives.

Fund development, administration and governance expenses for the fiscal year ended December 31, 2017 totaled \$645,996. This figure does not include special projects that were funded separately from normal operating revenue. The expense of development activities is not necessarily related to the donations received in any one year and gift delays result in costs preceding the receipt of gifts by several years (for example, gifts in wills and life insurance). As a result, consistent with the community foundation sector, operating costs are evaluated by a ratio of total core operating expenses (excluding special projects) to total assets. For 2017, that percentage was 0.90% (down from 1.60% in 2016 and 2.04% in 2015), which is below the range of community foundations of similar size and stage of development. Each endowment fund is charged a pro-rated administration fee of up to 1.25 per cent which helps to offset these expenses.

## Investment fees and returns

A portion of the Foundation’s investments are pooled with a number of other public foundations and charities in an investment pool with the Toronto Foundation (TF). This relationship has been in place since 2001 and is re-evaluated on a regular basis by the Investment Committee.

The endowments are invested according to the investment policy guidelines established by Foundation’s board and are available at [www.niagaracommunityfoundation.org](http://www.niagaracommunityfoundation.org). All portfolios are managed by professional investment managers and in accordance with the policy.

## LONG TERM STRATEGIC ASSET ALLOCATIONS

ASSET CLASS	PERMISSIBLE RANGE
Cash and cash equivalents	0% to 50%
Fixed Income Instruments	0% to 50%
Total Fixed Income	5% to 50%
Global Equities*	0% to 65%
Other Strategies**	25% to 50%
Total Equities & Other Strategies	50% to 95%

\* Global Equities may include Canadian, US, International and Emerging Markets equities. They may be diversified by size (large cap, small and mid-cap), style (value & growth) and other factors such as high dividend stocks.

\*\* Other Strategies may include benchmark-free and absolute return strategies.

The average investment fee paid for 2017 was 0.58% for funds in the TF investment pool. The investment fee is charged monthly to each fund on a pro-rated basis. Investments returned 8.37% in 2017 net of fees and an annualized five year (2013-2017) return of 9.1% net of fees.

In November 2012, the board of the Foundation made a commitment to invest \$500,000 in the Community Forward Fund, a social finance investment fund. The initial draw on this investment took place in February 2014. As of December 31, 2017 the Foundation has invested \$357,707 in this fund. For 2017 the investment returns on this fund were 2.43%. The Board is willing to have a lower return because 100% of the capital is invested with non-profits and charities.

## FINANCIAL AND GOVERNANCE HIGHLIGHTS

### Risk management

The Board has a comprehensive Risk Management Policy covering legislative and legal, fiscal performance, financial reporting, management of volunteers, effective management and governance, economic risk, and donor and volunteer stewardship. The Finance Committee reviews the Foundation's exposure to risk and mitigants to address perceived or actual risks annually. The Board regularly considers risk exposure as part of its deliberations. The price risk related to investments arises due to fluctuations as a result of changes in market prices whether those changes are caused by factors specific to the individual security or its issuer or factors affecting all securities traded in the market. Accordingly, the Foundation is exposed to the effects of the market fluctuations. While market risk cannot be eliminated, the Foundation's Investment Policy addresses this risk with parameters for both asset quality and diversification.

### Accreditation

In 2012, the Foundation received accreditation through Imagine Canada's Standards Program. The Foundation was one of the first community foundations accredited in Canada. The program offers a Canada-wide set of shared standards for charities and nonprofits wishing to enhance their effectiveness in the fundamentals of governance, paid-staff management, financial accountability, fundraising and volunteer management. The program includes a voluntary accreditation program for organizations wishing to publicly demonstrate they have successfully met the standards through a third-party peer review process. 2017 saw the Foundation go through Imagine Canada's Re-Accreditation process to confirm that the organization is in compliance and exceeding the standards for charitable excellence.

### Evaluation

The Board has adopted a comprehensive annual process to evaluate its performance. The results of the evaluation are reviewed at its November meeting where actions to improve board performance are implemented. Moving forward the evaluation will be reviewed at the April meeting. This process is done on a biennial basis with Foundation committees. Employees of the Foundation participate in annual performance appraisals, which include on-going review throughout the year. The Executive Director's review is presented annually to the Board by the Board Chair.

### Compensation

The Board has established salary ranges for each of the Foundation employees. The ranges are determined based on reviewing similar positions within the community foundation sector across Canada as well as similar positions within Niagara. Ranges are adjusted regularly to reflect cost of living changes. Movement through the range is dependent on performance. For 2017, \$99,595 was expended for the Executive Director's salary.

### Board recruitment, orientation and training

The Bylaws of the Foundation set out the Board recruitment process. Nominees from across Niagara are identified based on current board attributes and future strategic needs. The Board is comprised of 17 members who are elected for a three-year term, which can be renewed once. The term can be extended if a Director is serving as the vice-chair, chair or past-chair.

New Directors take part in a formal orientation program. Board training takes place at each meeting and additional opportunities are provided throughout the year for members to participate in professional development provided by Community Foundations of Canada.



# THANK YOU TO OUR SUPPORTERS

The contribution of time and talents of our volunteers, donors and staff is the 'intangible wealth' of the Foundation. Starting in 2012 we began tracking the number of hours our volunteers contributed. Last year they contributed 1,746 hours, and based on \$15/hr hour, this gift works out to \$26,183 in support! Thank you so much for this amazing contribution of time and talent.

## Board of Directors

*Robert (Bob) Watson (Chair)*

Retired, CEO, PenFinancial Credit Union

*Madeline Woodhead (Past-Chair)*

Investment Advisor, National Bank Financial

*Damian Goulbourne (Vice-Chair)*

Acting Associate Dean, Niagara College

*Ruth Todd (Treasurer)*

Managing Partner, KPMG Hamilton Niagara

## Directors

Dino A. DiCenzo

CEO, Canadian Niagara Hotels and Entertainment Inc.

Gary Evans

Vice President & General Manager, Edson Packaging

Mario Ferrara

Retired, Investment Banker

Jessica Friesen

CEO, Gales Gas Bars Ltd.

Bev Hodgson

Owner, Bev Hodgson Barrister & Solicitor

Jim Howden

Retired, HSBC Bank

Michael Lethby

Executive Director, The RAFT

Michael Mann

Partner, Lancaster Brooks & Welch LLP

Rosanne Marsh

Retired educator

Scott Maskell

Vice-President, Glenly Insurance Brokers Ltd.

Janet St. Amand

CEO, YMCA of Niagara

David Shaw

Agent Owner, Xerox Canada

Sharon Svob

Retired, fund development voluntary sector

## Ambassadors

Sandy Annunziata, John Armstrong, Brian Babcock, Ann-Louise Branscombe, Frank Caplan, Pat Darte, Andrea Douglas, Denise Elliott, John Fisher, Rich Gark, Eric Gilbert, Alan Goddard, Mel Groom, Brad Hutchings, Paul Jones, Paul Leon, Jodi Lycett, Rena McDonald, Shirley Martin, Maria Menechella, Victor Muratori, Rob Neill, Eugene Oatley, Liz Palmieri, John Palumbo, John Potts, Kelly Robson, Betty-Lou Souter, Wade Stayzer, Mary Turner, Doug Whitty, Rob Welch & Chris Wilson

### GRIMSBY FUND ADVISORY COMMITTEE

Naomi Beirnes, Gary Evans (Chair), Alan Goddard, Jim Howden, Ken Pettigrew, Amanda Pyper, Bryan Rose (Staff), Tony Quirk, Ruth Todd, Trish Vidler (Staff)

### LINCOLN FUND ADVISORY COMMITTEE

Carrie Beatty (Chair), Rob Foster, Rich Gark, Sara Holmes, Adrian Pennachetti, Stuart Reimer, Bryan Rose (Staff), Trish Vidler (Staff), David Wood

### NIAGARA-ON-THE-LAKE FUND ADVISORY COMMITTEE

Ann-Louise Branscombe, Nancy Baily, Ken Bridgman, Wendy Cheropita (Chair), Lord Mayor Pat Darte, Brianne Hawley, Joan King, Liesa Lepp, Debi Pratt, Bryan Rose (Staff), Shawn Spiewak, Trish Vidler (Staff)

### NIAGARA WEST FUND ADVISORS

Margaret Andrewes, Eric Gilbert, Don Knechtel, Wendy Rittenhouse

### PELHAM FUND ADVISORS

Mayor Dave Augustyn, Mel Groom, Carolyn Mullin

### PORT COLBORNE FUND ADVISORY COMMITTEE

Claudia Brema (Chair), Dave Elliott, Rosanne Marsh, Bryan Rose (Staff), Gary Talosi, Darlene Tuck, Trish Vidler (Staff), Christopher Wilson

### ST. CATHARINES FUND ADVISORY COMMITTEE

Sharon Borgmann, Mark Brohman, JoAnne Krick (Staff), Peter Partridge Jr. (Chair), Bryan Rose (Staff)

### WAINFLEET FUND ADVISORY COMMITTEE

Lori Hemmskerk, Kelly Robson (Chair), Bryan Rose (Staff), Sharon Svob, Trish Vidler (Staff)

### WELLAND FUND COMMITTEE ADVISORS

Michael Grocholsky, Jeff Neill (Chair), Aulf Robitaille, Bryan Rose (Staff), Trish Vidler (Staff)

### COMMUNITY LEADERSHIP COMMITTEE

John Fisher, Damian Goulbourne (Chair), JoAnne Krick (Staff), Mike Lethby, Rick Merritt, Jessica Potts, Bryan Rose (Staff), Pam Swick Janjac (Staff), Janet St. Amand, Suzanne Veenstra (Staff), Madeline Woodhead

### FINANCE COMMITTEE

Dino DiCenzo, Judith Hill (Accountant), Laura Hills, Bryan Rose (Staff), Ruth Todd (Chair), Bob Watson, Brian Wilkie

### GOVERNANCE COMMITTEE

Bryan Rose (Staff), Dave Shaw, Ruth Todd, Bob Watson (Chair), Madeline Woodhead

## THANK YOU TO OUR SUPPORTERS

### GRANTS COMMITTEE

Janet Booth, Natalie Chaumont, John Cunningham, Ashleigh Dronyk, Manfred Fast, Wes Foebel, Jessica Friesen, Rachel Gillmore, Rob Hunt, JoAnne Krick (Staff), Peter Kryger, Wendy Luce, Michael Mann, Leah Maves, Jamie Mereweather, Shoneez Munshi, Andy Panko, Vince Polce, Jan Potts, Sharon Svob (Chair), Louise Veres

### INVESTMENT COMMITTEE

Jim Blake, Mario Ferrara (Chair), Alan Goddard, Jim Howden, Peter Nixon, Bryan Rose (Staff), Ruth Todd, Suzanne Wilson, Madeline Woodhead

### NOMINATING COMMITTEE

Mario Ferrara, Damian Goulbourne, Bryan Rose (Staff), Sharon Svob, Ruth Todd, Bob Watson, Madeline Woodhead (Chair)

## 2017 Volunteers and Sponsors in Annual Report

### AU MARCHÉ COMMITTEE

Lauri Brady, Susanna Brousseau, Nancy Croce, Julie Hughes, JoAnne Krick (Staff), Leanne Kurek, Lindsay Marcaccio, Angelo Nitsopoulos, Peter Partridge, Jr. (Chair), Jason Pollock, Bryan Rose (Staff), Mayor Walter Sendzik, Kristen Smith, Steve Solski

### AU MARCHÉ SPONSORS

A1 Flooring Canada, Brock University, Caffè Gatti, City of St. Catharines, CN, Con Gusto Artisan Bakery, Croce Consulting and Event Management, First Ontario Performing Arts Centre, Freedom 55 Financial, a division of London Life Insurance Company, Fresco's Euro Grille and Bar, GT French, H2Only, Henry of Pelham Family Estate Winery, Holiday Inn & Suites Parkway Conference Centre, JJ Kapps Backyard BBQ Steak and Grill, Lapennaco, Lina Linguini's Pasta and Grill, Lock Street Brewing Company, Mackenzie Investments, Meridian, MNP, Niagara College Teaching Brewery, Niagara College Teaching Winery, 180 Marketing, Pad Thai & More / YaYee Thai Street Food, Pandor Productions, Partridge Wealth Management, Rankin Construction Inc., RBC Dominion Securities, Pig Out Events, RBC Global Asset Management, RBC Royal Bank, Roberto's Pizza Passion, Savoia Hor's D'Oeuvres, Seasons, Shorthills Tree Service Inc., Shriner's Creek Kettle Popcorn, Silversmith Brewing Company, The Standard, Sullivan Mahoney, 13th Street Winery, Walker Industries

### RANDOM ACTS OF KINDNESS COMMITTEE

Lauri Brady, Dana Brown, Marisa Brown, Tamara Coleman-Lawrie, Kris Cyr Chapados, Eric Demers, Filomena Goldsworthy, Karrie Haynes, Miranda Hummel, Alissa Jesik, JoAnne Krick (Staff), Peter Kryger, Rebecca Nicholson, Melanie Olah, Deborah Ogilvie, Amy Roy, Sarah Singleton, Kristen Smith, Cassandra Snopkowski, Ryan Treanor, Stephanie Turton

### RANDOM ACTS OF KINDNESS SPONSORS

Brock University, Centre de santé Communautaire Hamilton/Niagara, District School Board of Niagara, Giant FM 91.7, Greater Niagara Chamber of Commerce, Starbucks, Fallsview Casino Resort & Casino Niagara, Meridian, Niagara Catholic District School Board, Niagara College, Niagara Peninsula Energy Inc., Niagara Region, The Print House, The Review, The Standard, The Tribune, United Way, Walker Industries, YMCA of Niagara, YourTV

### 16TH ANNUAL CANADIAN BUSINESS LEADERS BREAKFAST SPONSORS

ReSolve Asset Management, KPMG, Meridian Credit Union, Niagara Peninsula Energy Inc., The Review, The Standard, The Tribune, YourTV

### MY STORY WRITERS

Judith Barker, Maureen McRae, Debi Pratt

### ANNUAL REPORT WRITERS

Marlene Bergsma, Tiffany Mayer, Debi Pratt

### OTHER SUPPORTERS

13th Street Winery, City of Niagara Falls – Sleep Cheap Charities Reap event participants, Cooperman Real Estate Inc., National Bank Financial, St. Catharines Golf & Country Club, Town of Lincoln – Mayor's Gala, Walker Industries

### STAFF

Bryan J. Rose (Executive Director), Orla Fitzpatrick Newhouse (Administrative & Donor Services Co-Ordinator), JoAnne Krick (Community Initiatives Manager), Judith Hill (Accountant), Pam Swick Janjac (NPI Special Projects Convener), Bea Taylor (Office Volunteer), Suzanne Veenstra (Niagara Prosperity Initiative Convener), Trish Vidler (150th Initiative Coordinator)



SMART & CARING  
COMMUNITIES



The Standards Program Trustmark is a mark of Imagine Canada used under licence by Niagara Community Foundation.

THANKS

TO THE FOLLOWING FOR SPONSORING OUR ANNUAL REPORT



RBC Wealth Management  
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THE FOUNDATION of my community  
starts with you and me –  
more than charity  
it's the empathy  
I feel for the people  
where I live.

Close to home is where the heart is,  
where help goes farthest  
My foundation helps me start this:  
people standing tall  
in towns big and small,  
urban, rural, one and all.  
My care comes through  
helping those that can't make do,  
Or get by, or maybe just need to fly.

My foundation has roots across the land,  
intertwining, hand-to-hand,  
showing what we thousands banded  
together can do, including you,  
making true  
the endeavour  
to make things better  
for generations still,  
their dreams fulfilled,  
it all gets built...  
on THE FOUNDATION.



301-8 Church Street, St. Catharines, ON L2R 3B3, Phone: 905.684.8688, Fax: 905.684.2337  
Email: [info@niagaracommunityfoundation.org](mailto:info@niagaracommunityfoundation.org) [www.niagaracommunityfoundation.org](http://www.niagaracommunityfoundation.org)

Charitable Registration Number: 867105322RR0001