



## 2016 Annual Report

2015 has been an exciting year in the history of the Perth and District Community Foundation, with new leadership, a new direction and a new approach to the business of philanthropy. We have implemented a number of changes to streamline our granting process to be more responsive to the needs of our community. With the doubling of our endowment fund we will be able to fund a greater number of projects and address emerging opportunities. As our new logo indicates we are turning over a new leaf in our approach to working with and supporting our community in a creative and collaborative way.

### President's Report

2015 has proved to be a watershed year in the development and growth of our Community Foundation. Assets under management have reached over \$2 million thanks to donations in 2015 totalling over \$1 million. PDCF granted out over \$40,000 to the community, bringing our total contribution since PDCF was founded in 2002 to \$320,000.

Following a selection process made difficult by the large number of qualified applicants, Lynn McIntyre joined PDCF as Executive Director in April. He wasted no time in getting down to business, marshaling the forces of the Board, assisted by former board members, Ann Munroe, Steve Hillier and Colin Stephenson, to develop a new strategic plan to chart PDCF's path for the next three years.

Putting plan into practise, PDCF reached out to the community with three exciting new initiatives. Taking the lead from the Governor General's National Smart and Caring Community Initiative, PDCF worked with community leaders to establish the Smiths Falls and Montague Community Fund (SFMCF) to benefit members of those communities.

Moved by the plight of Syrian refugees, PDCF was able to demonstrate its role as a community convenor to work with members of the community to establish the CARR fund to fund the resettlement of refugees. An astonishing \$100,000 was raised in 8 weeks and a formidable team of volunteers coalesced around a core of local partners and committed leaders to lead the planned resettlement of three families in our community.

PDCF convened a focus group of past grant recipients to provide input on the granting process, pressing issues and community needs assessment.

To take advantage of former board members interest in PDCF's work, PDCF established an Emeritus Council to provide advice and guidance to the Board on matters of significance to the Community Foundation.

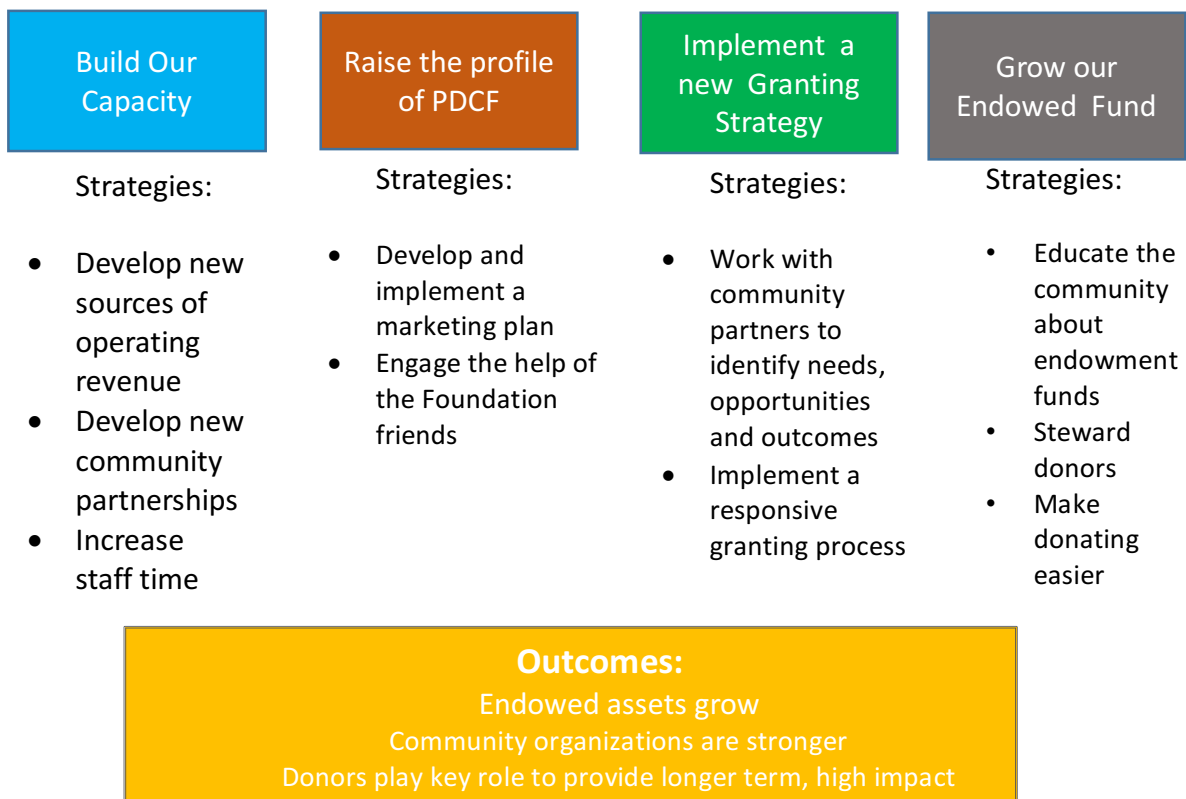
Our heartfelt thanks go to Katie Ireton and Bob Fitzsimmons, retired from the Board after four years of service and Connie Willows after two years of service for their outstanding contribution to the organization. We also thank our volunteers: webmaster, Colin Stephenson, Howard Allan and Carole Fuller of Allan and Partners LLP, Ann Munroe for serving on the Executive Director selection committee and Lana March for serving on the Charities Committee.

PDCF will profit in our work next year from the lessons we learned this year; we live in a very generous and caring community; creative partnerships get things done; people can learn quickly to work together effectively for a cause they support.

## Highlights from the Executive Director

This past summer the Board of Directors undertook to update and revise the Strategic Plan. While the vision and the mission of the PDCF remains the same, priorities for the organization over the next two years are focused on four key areas:

1. building our capacity,
2. raising the profile of PDCF,
3. implementing a new granting strategy and
4. growing our endowed fund.

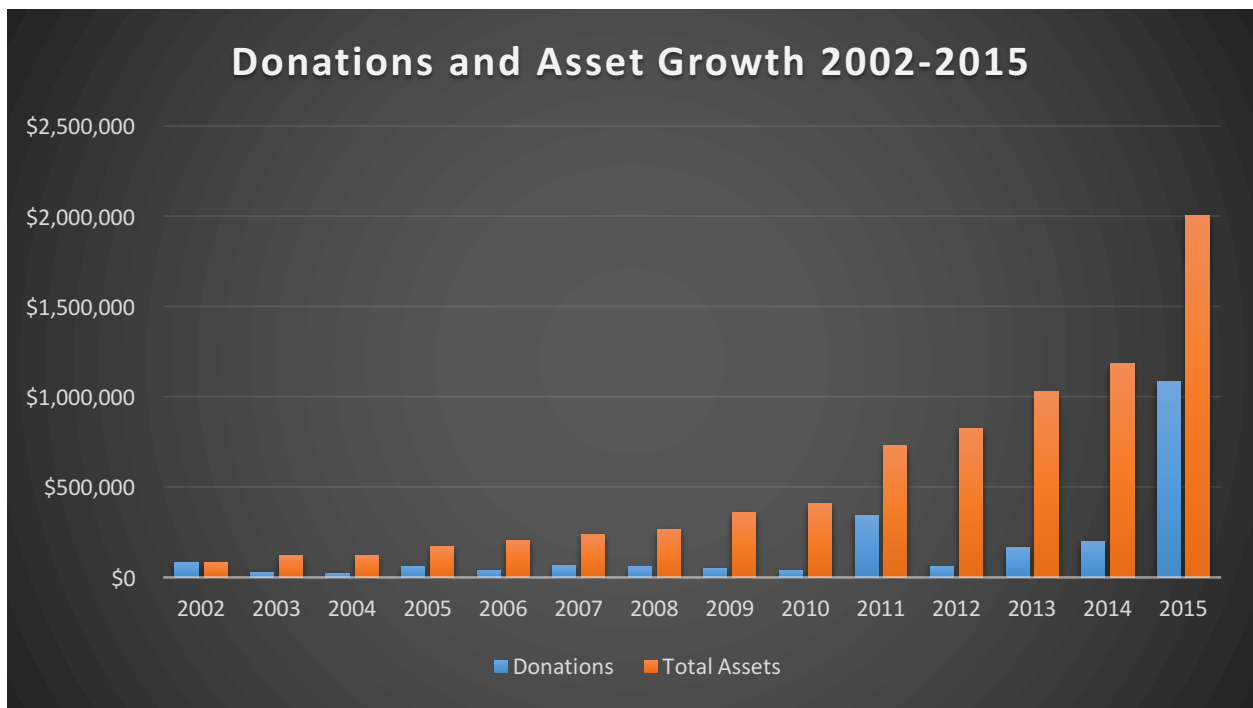


In terms of building our capacity the organization is looking to develop new sources of operating revenue and developing new community partnerships.

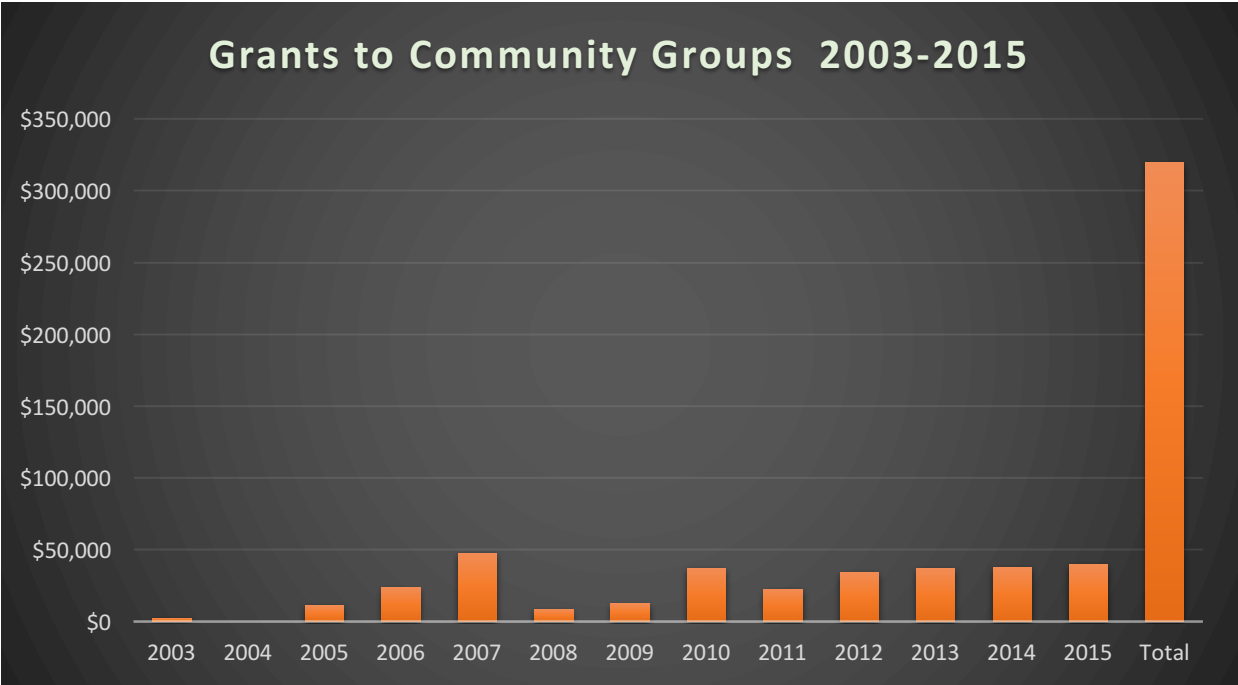
In order to raise the profile of the foundation, the Board has formed a Marketing Committee to rebrand the organization and make better use of social media such as Facebook and Instagram. An Emeritus Council has been formed as well to provide advice and guidance to the Board on matters of significance to the Community Foundation.

The Charities Liaison Committee has revised the granting process and guidelines to be more responsive to the needs of the grant recipients. A focus group of past grant recipients was held in the fall to seek input on the granting process, pressing issues and to discuss a needs assessment for our catchment area.

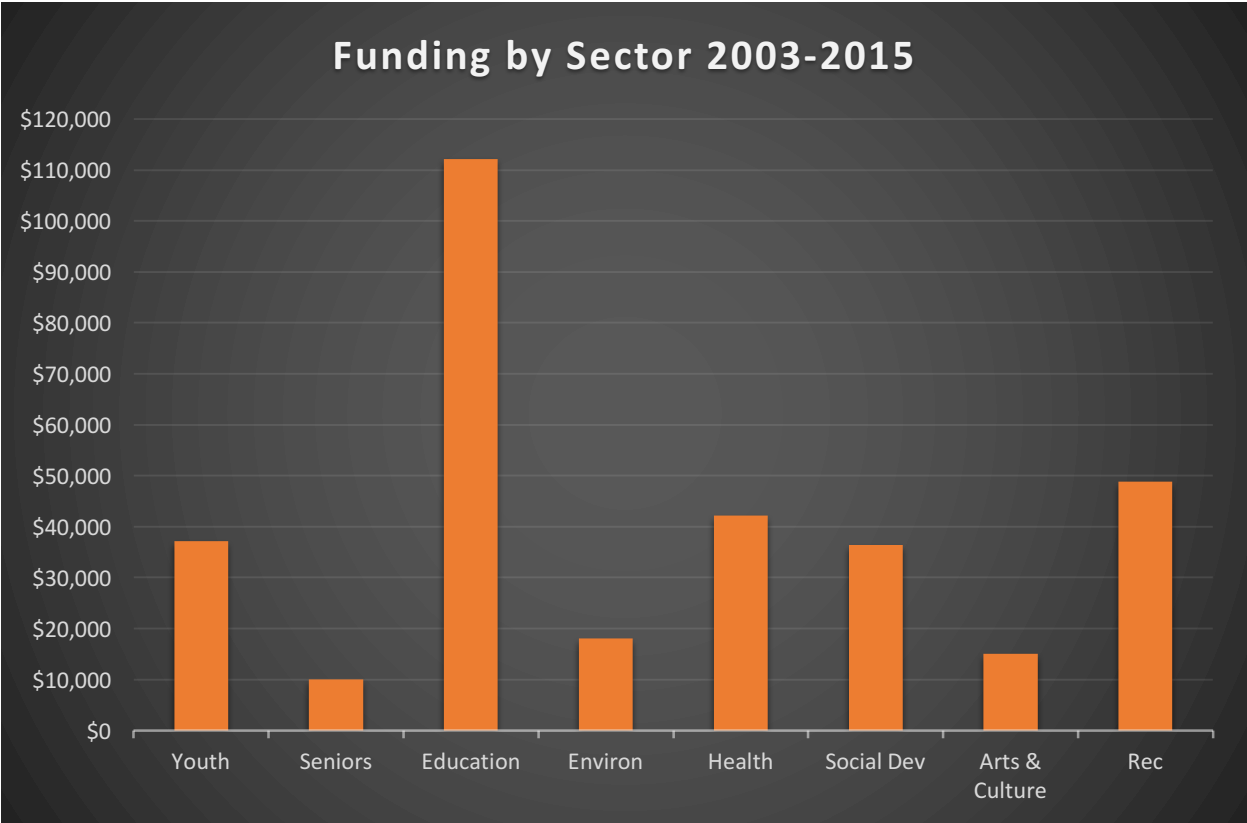
In an effort to Grow the Endowed Fund, the foundation is looking at ways to make donating easier and educating the community about endowment funds.



**Table One.** Donation and asset growth for the period 2002 to 2015.



**Table Two.** Grants to community groups for the period 2003-2015.



**Table Three.** Grants and scholarship disbursement by sector for the period 2003-2015

## Community Initiatives

### Community Alliance for Refugee Resettlement

A meeting convened by PDCF in September 2015 brought together over 40 individuals from local churches, schools, service clubs, local government and all across PDCF's catchment area to determine the level of local interest in the sponsorship of refugees from Syria.

Recognizing that we are all immigrants or descendants of immigrants, many expressed the need to show gratitude for their own good fortune by reaching out and sharing it with these refugees who so desperately need help. With overwhelming support for the project among those in attendance and an expressed desire to move ahead quickly with the sponsoring process the organization called Community Alliance for Refugee Resettlement (CARR) was formed. The community response was overwhelming with over a hundred volunteers contributing their time and resources and raising over \$100,000 in eight weeks.

Here are a few of the many comments donors provided...

*"Thank you for showing our community and the world that Canadians still care. What you do is very important and I'm proud to be part of a community of people that can rise above the hate and supports worthwhile causes. I wish you the best of luck."*

*"Great initiative! Congratulations to all the movers and shakers contributing time and effort to make this happen."*

*"Wonderful to see such dedication in our little community."*

*"Every year my grandpa gives me \$20.00 to donate to a charity, this year I have chosen to give it to the Refugee Fund."*

### Smart and Caring Community Initiative – Smiths Falls and Montague Community Fund



A key component of the Smart and Caring Community Initiative is for every Canadian municipality to be served by one of the 191 community foundations and for all communities to gain access to funds and resources to respond to local priorities and support vital community initiatives. "Barn-raisers" by nature, community foundations have dedicated themselves to building better places to live, work, and play for all Canadian citizens for close to 100 years. In the spring of 2015 PDCF met with a committed group of community leaders from the Town of

Smiths Falls and Montague Township to establish a Community Fund under the umbrella of the PDCF. PDCF provides back office support and advice to the group with the ultimate goal that one day the group will establish its own community foundation.

## PDCF Focus Group

In the fall 2015, PDCF convened a meeting of charitable organizations within our catchment area to discuss our granting process, emerging issues in our area and support for a needs assessment. Important outcomes included a simplified granting process and support among the group to further discuss a needs assessment.

## Statement of Financial Position 2015

<b>The Perth and District Community Foundation Statement of Financial Position</b>		
<b>December 31</b>	<b>2015</b>	<b>2014</b>
	<b>\$</b>	<b>\$</b>
<b>Assets</b>		
<b>Current</b>		
Cash	50,473	77,160
Miscellaneous receivables	32,915	7,709
	<b>83,388</b>	<b>84,869</b>
<b>Investments (note 2)</b>	<b>2,088,052</b>	<b>1,104,480</b>
<b>Total Assets</b>	<b>2,171,440</b>	<b>1,189,349</b>
<b>Liabilities</b>		
<b>Current</b>		
Accounts payable and accrued liabilities	5,206	2,382
<b>Fund Balances</b>		
Operating fund	25,040	35,042
Unrestricted fund	153,678	160,334
Restricted and named funds (note 3)	1,987,516	991,591
	<b>2,166,234</b>	<b>1,186,967</b>
<b>Total Liabilities and Fund Balances</b>	<b>2,171,440</b>	<b>1,189,349</b>

Approved on Behalf of the Board:

\_\_\_\_\_ Director

\_\_\_\_\_ Director

**The Perth and District Community Foundation  
Statement of Operations and Fund Balances**

For the year ended December 31	Operating Fund	Unrestricted Fund	Restricted Fund	2015	2014
	\$	\$	\$	\$	\$
<b>Revenues</b>					
Donations	3,296	14,006	1,097,423	1,114,725	205,068
Investment income (loss)	---	(5,823)	(58,896)	(64,719)	73,522
Golf Tournament (net)	11,818	---	---	11,818	19,636
Christmas Fundraiser (net)	23,978	---	---	23,978	24,458
Other income	852	---	---	852	1,519
	39,944	8,183	1,038,527	1,086,654	324,203
<b>Expenditures</b>					
Administrative					
Marketing, advertising	4,484	---	---	4,484	2,249
Office and general	10,485	---	---	10,485	11,781
Salaries and benefits	35,077	---	---	35,077	45,701
Grants	---	14,739	42,602	57,341	106,427
	50,046	14,739	42,602	107,387	166,158
<b>Net Revenues (Expenditures) for the Year</b>	(10,102)	(6,556)	995,925	979,267	158,045
<b>Fund Balances, Beginning of Year</b>	35,142	160,234	991,591	1,186,967	1,028,922
<b>Fund Balances, End of Year</b>	25,040	153,678	1,987,516	2,166,234	1,186,967

### Grants, Scholarship and Bursaries

The Perth and District Community Foundation will make grants of \$40,000 to support the following initiatives this year.

The North Lanark Community Health Centre received a grant to the Community Dinner Program offered by Lanark Highlands Plan B Citizens Group, which provides nutritious, hot meals once a month in a positive, inclusive, multi-generational setting. **Easter Seals Camp Merrywood** received a grant to support their Multi Sport Program including expanding sports

to include wheelchair tennis, racing, triathlon and sailboat racing. **The Table Community Food Centre's** grant will be used for their Tiny Taste Program, this 12-week program, offered in Perth and Lanark village, will help parents of 1 to 4 year olds introduce them to healthy food. Using the Foundation grant, **Lanark Highlands Youth Centre**, will continue to offer an exciting Summer Excursion Program including trips and special events that provide an opportunity for youth to engage in active living, leadership development and career awareness. **Lanark County Therapeutic Riding** is receiving a grant to purchase a wheelchair accessible portable toilet. Currently 59 riders assisted by 37 volunteers benefit from regular visits to Cedar Rock Farm, near Perth. The **Township of Drummond/North Elmsley** will use their grant to convert and informal reuse centre into a self-sustaining operation and to recruit and train volunteers to operate the centre. **Open Doors for Children & Youth** received a grant to create a social media platform which will provide mental health information to youth and service providers. **Perth Enrichment Program for Older Adults (PEP)**, will use their grant to purchase exercise equipment such as hand weights, Thera bands and gliding discs for their Exercise Program. Using the Community Foundation grant, **Mississippi Madawaska Land Trust**, will host youth from YAK and the Lanark Youth Centre on nature hikes to Blueberry Mountain to connect youth to nature. **Lanark County Community Justice Program**, will use their grant for their Be Strong Program - to teach youth and teachers the value of restorative practices in everyday life. **Perth Regional Heritage Fair**, received a grant for its annual fair. Over 600 students from 12 schools do Canadian history projects and 100 students will present their projects at Heritage Fair. The grant provided by the Community Foundation to **Burning Passions Theatre**, will support the Youth Theatre Training Project which will stage Perth through the Ages and partner with YAK to work with youth at risk to create a play about issues unique to rural youth. **Lanark County Interval House** is receiving a grant to conduct a series of workshops in schools called "Where is the Love" to promote awareness among youth about violence against women. **Alzheimer's Society of Lanark, Leeds and Grenville**, will use its grant to support the program called, "Meet me at the National Gallery of Canada," which provides an opportunity for persons with dementia to visit the NAC and participate in a program designed specifically for people with dementia. **North Lanark Community Health Centre**, is receiving a grant for the Heart Saver Training Program to deliver four CPR/AED training sessions for up to 60 volunteers in north Lanark.

**YAK, Big Brothers Big Sisters and The Perth and District Union Public Library** all received disbursements from their Foundation Agency Funds to support their various programs. **Algonquin College Foundation** also received their fifth pledge of a five-year contribution from PDCF in support of the Perth Campus capital campaign.

In 2015, student scholarships and bursaries totaling \$9500 was given to local students at PDCI, St. John High School and T. R. Leger School. These students are selected by the schools, and the awards will be provided to students who are pursuing post-secondary education. Additional



bursaries of \$2400 will be awarded to students at Algonquin College Perth Campus from the PDCF- Lily Roy Fund and the PDCF-Town of Perth Fund at the Algonquin College Foundation.

*Thanks to the over 250 donors and Family Funds who last year donated over \$1 million dollars to the Perth and District Community Foundation.*

Anderson Family	Dr. Murray Wilson
Benjamin Rogers Memorial	Robert J. Ellard Family
Big Brothers Big Sisters	Environmental Trust
Dr. William Cuthbertson	GKJ Community
Boysen Family	Graham Family
CARR Refugee	Don and Lorraine Hill (bequest)
Community Builders	Hollis Family
Dr. Gordon Jackson	Ken Gray Memorial
Ladly Family	Perth Blue Wings
Stuart and Sharon Laing	Perth Library Children's Literacy
McIntosh Perry	Smart and Caring
MERA Award of Excellence	Smiths Falls Montague
Reta M. Miller (bequest)	Strome / Drew
Munroe Family	Underhill McIntyre Family
Noble /Stolee Family	VCK Fund
O'Connor Family	Young Talent

## **PDCF Golf Classic**

The 11th Annual Legacy Golf Classic, was held on Friday, May 29, 2015. Thanks to our corporate sponsor, Best Western Plus Perth Parkside Inn and Spa and previous sponsor, Home Hardware, this event has raised more than \$250,000 for the Perth and District Community Foundation since 2005.

The Board of Directors of the Perth & District Community Foundation, and Best Western Plus Perth Parkside Inn and Spa would like to thank the following sponsors and contributors, as well as the golfers and volunteers, for their outstanding support in making this major fundraiser a reality for our Foundation.

### **Special Contributors**

The Organizing Committee of Dan Allatt, Elaine Turner, Connie Willows, Pat Wiseman, Christina Hunter and Janet Lavery, would like to extend special thanks to our very generous community volunteers for helping at the course on tournament day. Thank you!

**Title Sponsor** Best Western Plus Perth Parkside Inn & Spa

### **Prize Sponsor**

Conway's Men's Wear, Paws Oasis, Perth Power Sports, Purest Gluten Free Bakery, McMullan Appliance and Mattress Centre, Marks Cobbler Shop, Jersey Jo's Pizzeria, Burns Jewellers, Perth PC, Decorating by Design, Giant Tiger, WOW fit, Perth Home Hardware, Labatt, Algonquin College Foundation

**General Event Sponsors** Perth Picture Framing Shop, Anderson Foss, O'Reilly's Ale House

**Cart Sponsors** The Graham Nixon Group-BMO, Nesbitt Burns, Dynamic Funds, Allan Chartered Accountant Professional Corporation

**Lunch Sponsors** Fidelity Investments Canada

**Dinner Sponsors** CIBC Wood Gundy – The Johnson and Macrae Investment Group, Dyke and Murphy Professional Corporation

**Hole Sponsors** Hinton Dodge Chrysler, McIntosh Perry Surveying, Leo Adams Investments, Mahon Pools Spa and Tanning Salon, Blair & Son Home Furnishing, Slackoni's Restaurant

**Major Contributors** Hinton Dodge Chrysler, Metroland Media, Brownlee's Perth Metro, Barnabe's Your Independent Grocer, Perth Golf Course, J.D. Labelle (Photographer), Rob Dyke, Guy Saumure & Sons Construction, Lake 88 Bob Perreault – MC, Alex Willows – Auctioneer, Best Western Plus Perth, Parkside Spa and Hair Artistry, Prodecad, Sysco Canada, Canadian Tire (Perth)

**Key to Your Dreams** Jim Noble - RBC Wealth Management Dominion Securities

**Live Auction Highlight** Romantic Getaway at Best Western Plus Perth with Parkside Spa Services

## **PDCF Christmas Gala**

The Perth and District Community Foundation is extremely grateful to our generous sponsors, donors and contributors to the PDCF Christmas gala held on November 27, 2015. Most of all, we are appreciative of our valued guests who attended the Gala, many who have supported the event since 2005. You are the heart and soul of this fundraiser. Please support all of the generous, community minded businesses who supported your Community Foundation's Gala.

### **Our Corporate Sponsors**

Kelly Huibers McNeely Chartered Accountants Professional Corporation,  
Allan Chartered Accountant Professional Corporation, Jim Noble, RBC Dominion Securities,  
BMO Nesbitt Burns, Graham Dixon Group, Central Wire Industries

### **Our Live and Silent Auction Donors**

Father & Son Barber Shop, Randy Lentz Automotive, Canadian Tire, Perth, Eye & Vision Clinic,  
Spring Children- Art & Class, The Fieldhouse, Perth Golf Course, Mapleview Golf and Country  
Club, Timber Run, Lombard Glen Golf & Country Club, Smiths Falls Golf & Country Club, The  
Beach House, Maximillians, Hillside Gardens, Barnabe YIG, Christmas Courier (Fall River  
Fashions), Wayne Williams, Villages Treats, Apropos, Bronwyn Bell (Fetish Hair Studio), Blair &  
Son Home Furnishings, Perth Physiotherapy, The Yoga Connection, Lavender & Lace, Tineke  
Doornbosch, Best Western Perth Parkside Inn & Spa, The Stone Cellar, Mex Co, Classic Theatre  
Festival, Picnic Catering (Jordan Kennie), Dr. Alan Drummond, Howard Allan, Terry Finnegan,  
Jim Noble, Larry Smith, Judy Dempsey, Kelly's Flowers, and Perth Brewery

### **Our Special Contributors**

Master of Ceremonies-Brian Perkin, Auctioneer-Judy Hands of Hands Auction, Music provided  
by the St. Jimmy's 4, Tickets Please, BMO Nesbitt Burns, Graham Dixon Group, Images Inter  
Alia, Woodwark Stevens Ireton, Lake 88, The P(aa)PER Shop & Studio (Jaana Brett),  
Photographer- David Zimmerly,  
Our Caterer-The Stone Cellar, Best Western Plus Perth Parkside Inn and Spa

### **Our 2015 Gala Committee**

Katie Ireton- Committee Chair & PDCF Director; Chris Stranberg PDCF Director; Susan  
Borrowman – PDCF Director, Lisa Dowdall, Lana From, Amanda Neadow and Jordan Kennie.

