

2012 ANNUAL REPORT

helping good people
do great things in
their community



OUR VISION

Realizing community dreams through philanthropy.

OUR MISSION

The Niagara Community Foundation is a charitable public foundation dedicated to improving the quality of life in Niagara through building endowment funds, providing grants and enabling philanthropic partnerships.

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.

Cover photo – Go to page 8 to read about the francophone seniors programs offered by Le Centre polyvalent des aînés francophones de Port Colborne.

EXECUTIVE MESSAGE



Liz Palmieri
Executive Director



Jodi Lycett
Board Chair

One of the strengths of the Niagara Community Foundation is our ability to be both reflective on our successes and challenges while continuing to be forward thinking in bringing new opportunities to Niagara.

The impact of flat returns in 2011 was reflected in a decline in grants in 2012. This was the third downturn in the markets since our launch in 2000. As a result of this trend and the impact on our granting programs, the Board made a decision to connect with each of our fund holders to determine what was a higher priority for the donor: to protect the

capital in their fund or to always make an annual distribution to support the fund beneficiaries. This change has positioned the Foundation to maintain and increase our impact in the community.

Since 2008, the Foundation has invested in the Living in Niagara report, a document which examines the health of Niagara relative to other Canadian communities according to a number of indicators. In recognition of the quality of the data and range of sectors covered, the Board expanded the discretionary grant criteria to give priority to applications which reference data, recommendations or trends in the report.

The bittersweet part of the work of the Foundation is how our growth is affected by the passing of our donors. This report notes that our assets grew by 65 per cent as a result of significant gifts received through bequests. These gifts are supporting organizations and causes important to the donor during their lifetime, and as a result benefit our community in many ways.

The other major change for 2012 stemmed from the Foundation's review of our investment policies. A new investment policy was adopted in partnership with the Toronto Community Foundation. We also made a commitment to a new type of social finance investment, joining other community foundations in investing in the voluntary sector.

Please take some time to check out pages 29-30 of this report where you will see our volunteers and supporters acknowledged. Our success, for which we are extremely grateful, would not be possible without these people and organizations.

Jodi Lycett, *Board Chair*
Liz Palmieri, *Executive Director*

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PRIORITIES, STRATEGIES, PLANS

HIGHLIGHTS

In 2008, the Niagara Community Foundation adopted a strategic plan based on extensive consultation with the community. At the Foundation's 2011 board retreat, strategic priorities were reviewed and adopted to continue through to 2014. The priorities are reviewed and assessed annually and in 2012 the board confirmed its commitment to these areas, which include:

- Increasing our impact in the community
- Building relationships with key influencers
- Enhancing our role as a community leader
- Building organizational capacity

In accordance with our plan, we achieved the following in 2012:

- Developed and implemented community outreach to key community leaders and potential donors, achieving 110% per cent of contact goal
- Made a commitment to invest \$500,000 in the Community Forward Fund, a social finance investment
- Worked in partnership with the Business Education Council and First Ontario Credit Union to implement a micro-finance initiative
- Convened a group of agency leaders called Change the Game to share resources, professional development opportunities and provide peer support
- Aligned Community, Youth and Mini Grant Program criteria with issues identified in the 2011 Living in Niagara Report
- Worked with fund holders to amend agreements to provide greater flexibility in supporting fund beneficiaries

- Increased transparency in financial reporting in our Annual Report, which garnered a \$5,000 prize from Queen's University Voluntary Sector Reporting Award competition
- Created new Smart & Caring Community Funds supporting: Children and Youth; Health and Well-being; Education and Leadership

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 partnered with others:

NIAGARA NEIGHBOURHOOD GOOD IDEA FUND

The Foundation partnered with the United Way and the Trillium Foundation, pooling their financial resources to develop a small grants program to support innovative projects at the neighbourhood level.

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 2012, we received funding to support the position of Convenor, enabling us to bring organizations together to share resources, implement best practices and collaboratively access funds to support a variety of poverty-reduction initiatives, including community gardens across Niagara. Staff from the Foundation also assisted with the review of the grant applications for \$1.2 million in NPI funding.

MICRO-FINANCE INITIATIVE

In partnership with First Ontario Credit Union and the Business Education Council, the Foundation invested in Niagara's first micro-finance initiative. Modeled after a similar program in Hamilton financed by First Ontario, the Foundation's Niagara Prosperity Convener brought the parties together to replicate this initiative in the region. People applying for the loans are mentored by agencies throughout Niagara that provide pre- and post-loan guidance and support. The program normalizes the banking relationship between individuals and the credit union, providing emerging entrepreneurs the opportunity to move off social assistance.

COMMUNITY FORWARD FUND

At its November meeting, the Board made a commitment to invest \$500,000 in the Community Forward Fund (CFF) in 2013. The decision was reached after 18 months of due diligence and research. This investment is a type of social finance investment where the primary goal is to support organizations serving a social or environmental good above achieving a competitive financial return. Typical investments could include loans for capital projects, providing bridge financing or mortgages. The Foundation is encouraging Niagara-based agencies looking for this type of financing to connect with CFF.

FINANCIAL HIGHLIGHTS:

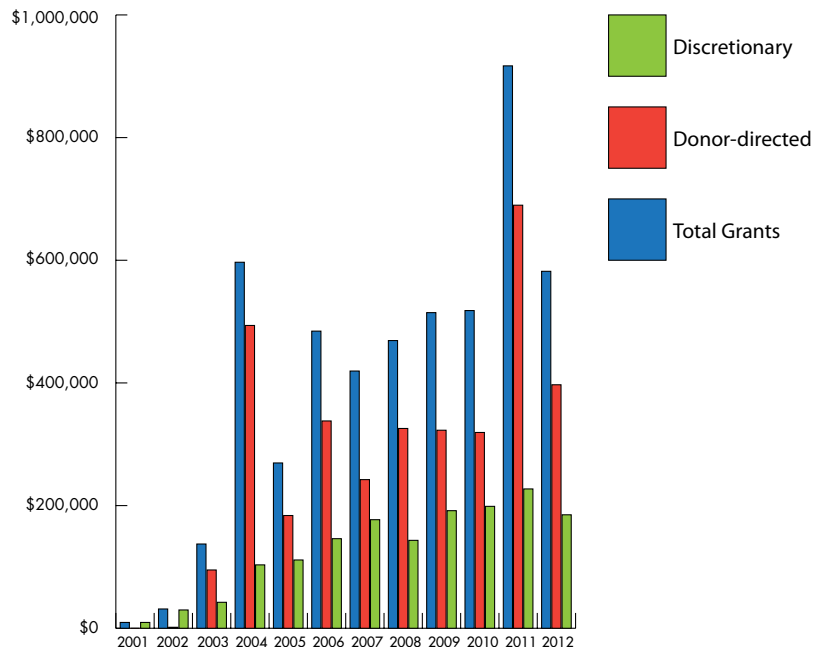
GIFTS RECEIVED: \$6,837,288

GRANTS AWARDED: \$581,409

GROWTH IN ASSETS: 62%

OPERATING EXPENSES: 2.5% of average total assets

GROWTH IN GRANTS 2001 - 2012





GRANTS ENABLE COMMUNITY DREAMS

PROMOTING GOOD FOOD

The Good Food Box program was created by Gateway Residential and Community Support Services, an agency which enables individuals with serious mental illness to achieve greater independence through innovative consumer-centre housing and support services.

The program is a volunteer-run, produce-buying cooperative to help everyone to include more fresh fruits and vegetables in their meals. This low cost regional program is made possible because of group wholesale buying. Gateway consumers provide the volunteer labour for sorting and packing which also keeps the price down.

Tim Willick, a Gateway consumer, along with the Good Food Box host sites identified that many more people would take advantage of the program if they had methods of remembering ordering dates and were provided with facts about nutrition, recipes and information on food preparation techniques to assist program participants in consuming the fruits and vegetables in the Good Food Box.

The \$500 grant from the Foundation was used to create an 18-month calendar, which was created and coordinated by four Gateway consumers. *

NEW SEED-LENDING PROGRAM

Loan some seeds, watch them grow, harvest some seeds and share the wealth.

That's the vision behind a new program being offered at the Grimsby Public Library. Developed by Adrienne Charette, head of public services, the concept is something in which she had an interest.

After seeing that such programs were becoming popular at libraries in the United States, Charette pitched the idea and successfully applied for a \$200 grant, launching the program in June. The seed library is located in the centre of the library adjacent to gardening books, placed nearby for handy reference.

There is no cost to sign out seeds. The program allows library members to check out seeds, grow vegetables and return harvested seeds at the end of the growing season. This makes the program self-sustaining.

Charette noted that with Niagara's rich agricultural tradition, the program is a great fit for the community. The seed library is open year round and since the launch of the program other libraries in Ontario have expressed interest in starting their own seed-lending program. *

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SUPPORTING NIAGARA'S FRANCOPHONE SENIORS

Since 1988, Le Centre polyvalent des aînés francophones de Port Colborne has supported seniors in its community offering programs to alleviate isolation, improve mobility and celebrate francophone culture. Their building is home to recreational, educational and cultural programs.

Its educational programs help with translation and intergenerational programs. The social programs include visits to hospitalized members, friendly check-in phone calls, monthly suppers and dinner dances for special occasions. Exercise programs, arts and crafts classes, billiards, bingo and shuffleboard provide recreational opportunities for their members. Specialized services include income tax clinics, computer courses and a diabetic foot care clinic.

With a \$500 grant from the Foundation, a new library of francophone DVDs was created. The library includes fictional films, exercise videos and documentaries originating from Quebec and having French content. A group of volunteers were recruited to select the DVDs and also to organize a new program called “Les petits mercredis,” a monthly movie/activity day for members.

Initially, the DVD library will be used by their members. However, the ultimate goal is to work with Francophone clubs and organizations across Niagara as well as the French schools in the area. This grant is a great example of the impact a small grant can have in keeping seniors connected to their community. *

ITALIAN COMMUNITY COMING TOGETHER TO BUILD COMMUNITY PLAYGROUND

Club Italia's playground in Niagara Falls has been well used by a generation of children during the past 20 years. However, the equipment was never accessible and, due to its age, was being used less and less.

Members of the club came together to plan and design a new playground, one which could be used by families with young children and that was fully accessible. A core group of volunteers with skills as diverse as engineering, education, health, finance, design and marketing spent many hours on all aspects of this project.

Their goal to raise \$80,000 was helped with a grant of \$5,000 from the Foundation. Alfidone Construction has donated equipment and labour for all the preparation work required for the site along with the installation of the playground equipment and surfacing. As well, 20 club members have agreed to help install the recycled rubber tire surfacing for the playground.

People helping people – that's what community is all about. *

ONE THING LEADS TO ANOTHER...

Sometimes it only takes looking next door to see what works well. Literacy Link Niagara became aware of a program in Hamilton and approached the Foundation for a grant of \$4,480 to replicate it in Niagara.

Typically, clients of the various literacy groups participate in programs at the organizations' offices or in their classrooms. However, there are agencies and individuals in the community who did not know about the programs or literacy assessments.

With its grant, Literacy Link Niagara, a coalition of adult basic education literacy programs, created community hubs, similar to those created in Hamilton. An assessor from the local adult literacy network works throughout Niagara in community spaces, including the YWCA Niagara Region. The Welland Heritage Council now uses the assessment tool with newcomer and immigrant groups with great success.

This program has done very well and is growing. Partnerships expanded and strengthened with non-traditional service providers. The value of literacy assessments was enhanced enabling employment service partners to better assist their clients in realistic planning and goal-setting. And funding was secured to setup assessments via Skype, which are now provincial in scope. *

2012 GRANTS AWARDED

FROM OUR COMMUNITY, MINI, YOUTH, ENVIRONMENT AND STRATEGIC INITIATIVES

GRANT PROGRAMS. For detailed information on our current granting priorities visit our website at

www.niagaracommunityfoundation.org/grantprograms.html

Alzheimer Society Niagara Region	Records meaningful autobiographical information from individuals with Alzheimer's disease, thus preserving self-identity in the presence of dementia	\$4,950
Boys and Girls Club of Niagara - Niagara Falls	Remove the carpeting in the youth emergency shelter and replace it with VCT tile	\$3,000
Boys and Girls Club of Niagara - Niagara Falls ~	Purchase lighting to increase safety at the Fort Erie location	\$500
Boys and Girls Club of Niagara - Niagara Falls ~	Purchase of 2 cameras to be installed in the day care area to improve security of this space	\$500
Boys and Girls Club of Niagara - Night Light Youth Services	Purchase a deep freezer for the shelter which will allow the preservation of donated foods	\$500
Brock University - Community Learning	Fund the creation and printing of posters promoting the Community Learning events across the Niagara Region	\$500
Carousel Players	Bring 2 professional theatre artists into the 80 classrooms at 20 Niagara schools for art enrichment workshops for 1600 students in Grades JK to 3: linked to Water Under the Bridge touring production	\$3,000
CFUW St Catharines	Purchase teaching aids to support the Gift of Teaching project which tutors women migrant farm workers of the Niagara Region	\$359
Child Advocacy Centre Niagara	Develop and implement a formal volunteer program to provide representation of CACN in all 12 municipalities	\$4,400
City of St. Catharines - Friends of Malcomson Eco-Park	Remove invasive species of plants and replace them with native Carolinian trees and shrubs to improve wildlife habitat at the park's pond and amphibian wetland sites	\$3,000
Club Italia Lodge #5 - Niagara Marco Polo Foundation	Replace the over 20 year old play structure with a new fully accessible play structure, swings and surfacing	\$5,000
Community Care of St Catharines and Thorold	Replacement ID costs and marketing materials to promote identification clinics	\$5,000
Community Living - Grimsby Lincoln & West Lincoln	Production of Child Empowerment Education materials and Abuse Prevention Training materials	\$4,209
Community Living - Grimsby, Lincoln and West Lincoln	Creation of a website to promote the expanded employment services now offered in new Grimsby location	\$492
Community Living Port Colborne - Wainfleet *	Provide a teen program 2x per week for 30 underprivileged at risk youth	\$8,694

* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; ~ grant from Niagara Falls Fund

2012 GRANTS AWARDED

FROM OUR COMMUNITY, YOUTH, ENVIRONMENT, STRATEGIC INITIATIVES AND MINI GRANT PROGRAMS

Community Living Port Colborne - Wainfleet	Provide therapeutic art sessions at summer camp and playground programs for children and teens who are at-risk or have disabilities	\$1,652
District School Board of Niagara	Provide students the opportunity to apply innovative technology to the exploration of ecosystems at Woodend in an effort to support healthy land and water conservation	\$9,000
DSBN - Westlane Secondary School	What About Me? Workshops focusing on improving self-esteem, positive body image, health and overall wellness while also bringing awareness about mental health issues	\$2,500
Early Childhood Community Development Centre	French translation of the Parent Direct Niagara website, a one-stop electronic information hub	\$6,254
Education Foundation of Niagara	Series of anti-bullying presentations to parents, staff and community organizations	\$1,200
Education Foundation of Niagara	Purchase science equipment to be used to educate students about our watersheds so that they can apply learning from the classroom to real-life experiences	\$4,418
Faith Tabernacle Pentecostal Assembly - Faith Welland Outreach	Pilot music program at McLaughlin Community House that offers after school programming to youth in low income neighbourhood	\$5,258
Fort Erie Native Cultural Centre Inc.	Equipment for project geared for Aboriginal youth that are disengaged from school in order to re-engage youth to education through traditional Native teachings, hands on science and environmental studies	\$5,000
Friends Of Fort Erie's Creeks	Purchase of equipment and resources to support educational activities and presentations to Fort Erie community, including schools and youth groups	\$3,500
Gateway Resident & Community Support Services of Niagara	Fund the design and printing of a Good Food Box calendar that would be used by the recipients of the program to track days for ordering, pick up and Mobile Market days	\$500
Grimsby Public Library Board	Pilot a seed library that will provide cardholders the opportunity to plant food and reinvest seeds into the library collection the following season	\$235
Hannah House Maternity Home ~	Fund the purchase of baby equipment for the Niagara Falls centre for pregnant moms	\$500
Hannah House Maternity Home ~	Fund the purchase of 3 or 4 vacuum cleaners for the residents to be located on each floor of the home. This would eliminate the need for lifting of the vacuums to other floors for the pregnant women	\$500

* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; ~ grant from Niagara Falls Fund

2012 GRANTS AWARDED

FROM OUR COMMUNITY, YOUTH, ENVIRONMENT, STRATEGIC INITIATIVES AND MINI GRANT PROGRAMS

Head Injury Association of Fort Erie	Purchase display board and posters to promote the services of the organization	\$500
Heartland Forest Nature Experience	Develop curriculum for the Grade 7 strand for Life Systems: Interactions in the Environment	\$4,000
Hospice Niagara	Create a satellite station to improve service delivery and awareness of our programs and services to residents of South Niagara	\$5,000
Hospice Niagara	Purchase a digital camera and accessories to be used by the staff to promote the work of the agency through newsletters and social media	\$500
Le Centre Polyvalent des Aînés rancophones de Port Colborne	Creation of a Francophone library through the purchase of DVD's with the help of a volunteer committee	\$500
Learning Disabilities Association of Niagara Region	Purchase signage for the agency, which is located in a church, to assist individuals in finding the location while promoting the agency in the downtown	\$500
Niagara (Hope) Furniture Bank ~	Acquire equipment for more efficient and effective handling of furnishings in the warehouse	\$3,000
Niagara Artists Company (Niagara Artists Centre)	Sign creation, printing and audio work of the Youth HERE program in partnership with Carousel Players	\$475
Niagara Falls Art Gallery	Upgrade and replace aging equipment, including 2 laptops, for the student CSI program and hands-on manipulative equipment for the Pulleys, Gears, Structures and Mechanisms school programs	\$3,000
Niagara Falls Art Gallery ~	Fund CPR training for 9 staff who work with the 80,000 plus visitors	\$450
Pathstone Foundation	Replace the worn out bedding at Queenston location with new bedding for 8 youth beds	\$499
Pathstone Foundation	Equipment and furnishings for new youth Residential Treatment home in St. Catharines	\$4,427
Pelham Cares Inc.	Replace the out-of-date computer equipment and software for the Coordinator of Community Services	\$500
Pelham Cares Inc.	Fund the creation and printing of logo, letterhead, envelopes and promotional poster marking 30 years of service	\$500
Port Cares	Purchase of fork-lift truck to assist in moving food and supplies at the Reach Out Centre food bank	\$6,280
Regional Niagara Firefighters Volunteer Buffs Association	Fund the purchase of 3 safety helmets for 3 new volunteers that are used at emergencies	\$500

* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; ~ grant from Niagara Falls Fund

2012 GRANTS AWARDED

FROM OUR COMMUNITY, YOUTH, ENVIRONMENT, STRATEGIC INITIATIVES AND MINI GRANT PROGRAMS

Regional Niagara Upper Canada Lodge Auxiliary	Purchase entertainment system to provide a means for social, intellectual and physical involvement for residents in a unique way to help reduce isolation, loneliness, memory loss, and seek to stimulate conversation, social interaction, positive and fun interaction	\$6,039
Rose City - Kids Ministry +	Purchase equipment to accommodate expansion of after school tutoring program	\$7,000
Rose City - Kids Ministry	Purchase additional equipment to accommodate expansion of after school tutoring program	\$8,500
Schizophrenia Society of Ontario	Implement two new support groups aimed at addressing the educational, support and system navigation needs of families and consumers affected by schizophrenia	\$2,000
South Niagara Life Ministries	Funding to print new agency brochures	\$500
Southwestern Ontario Youth for Christ / Youth Unlimited	Purchase equipment and furnishings for kitchen and play space to be used for a Teen Mom program	\$5,000
St. David's Coop Nursery School	Purchase furniture and resources for the literacy corner of daycare to enhance the reading program	\$500
St. John Ambulance - Lincoln County Branch, St. Catharines	Purchase desktop computer for agency programming	\$500
The Hope Centre +	Purchase computer equipment and resources for Life Skills classes for their clients	\$1,200
The Hope Centre	Fund the redesign and printing of the agency brochure	\$500
The Weir Foundation - The RiverBrink Art Museum	Construction of wheelchair ramp to museum	\$5,000
Therapy Tails Niagara	Resource material and equipment for Anti-Bullying presentation, for children, through the experiences of a dog who was bullied his whole life, was rescued and rehabilitated	\$2,585
Victim Services Niagara	Purchase a portable printer to be used by staff to print documents that client/victim will need at the site of the emergency	\$500
Welland and District Humane Society (S.P.C.A.)	Renovation to the adoption area to create better space for animals	\$450
Welland Heritage Council and Multicultural Centre	Conduct a strategic planning session to develop innovative and sustainable ideas to continue to meet and exceed the current service demand of immigrants and refugees	\$2,200
Willowbank School of Restoration Arts	Establish an electronic database system for the school's specialized conservation library, with more than 1000 reference books and documents, including many rare items	\$3,262
	TOTAL	\$160,988

* grant from Port Colborne Fund; + grant from Welland Fund; ^ grant from Niagara West Fund; ~ grant from Niagara Falls Fund

2012 DONOR DIRECTED GRANTS

Animal Assistance Society of the Niagara Region	\$5,000	Education Foundation of Niagara	\$320
Arthritis Society Ontario Division - Niagara Peninsula Office	\$373	Engineers Without Borders	\$1,506
Beamsville Church of Christ	\$50,000	Fort Erie Society for the Prevention of Cruelty to Animals	\$400
Bethlehem Housing and Support Services	\$9,000	Goodwill Industries Niagara - Stokes Community Village	\$4,000
Big Brothers Big Sisters - Grimsby Lincoln, West Lincoln	\$3,113	Greater Niagara General Hospital Foundation	\$2,500
Big Brothers Big Sisters of Niagara Falls	\$1,000	Greater Niagara General Hospital Foundation	\$2,000
Big Brothers Big Sisters of South Niagara	\$507	Healthy Minds Canada	\$299
Bob Gale Recreation Fund	\$13,427	Heart and Stroke Foundation of Ontario	\$373
Brock University	\$1,000	Heart Niagara Inc.	\$500
Brock University - Student Awards and Financial Aid	\$1,200	Heritage Christian School - Niagara Reformed Christian Education Assoc.	\$1,500
Canadian Cancer Society	\$1,625	Hospice Niagara	\$3,000
Canadian Red Cross, Niagara Area Branches	\$747	International Child Care (Canada)	\$747
Carleton University - Awards and Financial Aid	\$1,200	Kiwanis Foundation of Niagara Falls	\$800
Carleton University - Awards and Financial Aid	\$1,200	Leadership Niagara - Brock University	\$5,000
Child Advocacy Centre Niagara	\$1,000	Lincoln County Humane Society	\$1,625
Chorus Niagara	\$889	Lincoln County Humane Society	\$4,380
Chorus Niagara	\$9,000	Lincoln Public Library	\$4,447
City of Welland	\$1,268	March of Dimes Canada	\$2,663
Community Animal Allies of Niagara	\$8,000	Mayholme Foundation	\$30,327
Community Care of St Catharines and Thorold	\$3,819	McMaster University	\$500
Community Care of St Catharines and Thorold	\$500	McNally House - Niagara West Community Hospice	\$1,625
*Community Care of St Catharines and Thorold	\$7,800	McNally House - Niagara West Community Hospice	\$5,000
Community Care of St Catharines and Thorold	\$500	Mohawk College	\$500
Community Care of West Niagara	\$4,002	Muscular Dystrophy Canada	\$8,747
Community Living - Grimsby Lincoln & West Lincoln	\$667	Newark Neighbours	\$500
Community Living - St. Catharines	\$258	Niagara Action for Animals	\$4,000
Conseil Scolaire de District Catholique	\$480	Niagara Action for Animals	\$1,500
Conseil Scolaire de District Catholique	\$420	Niagara Artists Company (Niagara Artists Centre)	\$435
Cystic Fibrosis Canada - Niagara Chapter	\$1,625	Niagara Christian Collegiate	\$1,500
Cystic Fibrosis Canada - Niagara Chapter	\$724	Niagara College Foundation	\$1,000
District School Board of Niagara	\$500	Niagara Community Foundation	\$1,556
District School Board of Niagara	\$3,435	Niagara Community Foundation	\$5,000
Doctors Without Borders Canada	\$747	Niagara Community Foundation	\$4,969
DSBN - A. N. Myer Secondary School	\$1,500	Niagara Falls Humane Society	\$500
DSBN - Beamsville District Secondary School	\$1,500	Niagara Falls Humane Society	\$1,000
DSBN - E.L. Crossley	\$1,500	Niagara Foundation for Catholic Education	\$500
DSBN - Grimsby Secondary School	\$541	Niagara Foundation for Catholic Education	\$500
DSBN - South Lincoln High School	\$1,500	Niagara Foundation for Catholic Education	\$1,000
DSBN - Stamford Collegiate Secondary School	\$500	Niagara Foundation for Catholic Education	\$1,500
DSBN - Stamford Collegiate Secondary School	\$1,500	Niagara Foundation for Catholic Education	\$1,500
DSBN - Westlane Secondary School	\$500	Niagara Foundation for Catholic Education	\$1,500
DSBN - Westlane Secondary School	\$1,500	Niagara Foundation for Family and Children's Services	\$1,580
Eden High School	\$1,500	Niagara Foundation for Family and Children's Services	\$969

* Grant from St. Catharines Fund.



CELEBRATING OUR GENEROUS DONORS

UNASSUMING WOMAN LEAVES REMARKABLE LEGACY

Olga Andrusiw's life was typical of many immigrants. Along with her husband Larry, she worked hard in her new country building a better life. Upon Larry's death a few years ago she remarked to her friend Marg Cyr that she was very appreciative of the help provided to her husband by paramedics in Niagara. So appreciative, in fact, that upon her death she bequeathed a \$530,000 gift to support education and training for paramedics.

The Foundation then worked with Niagara College and the Niagara Paramedics Association to create a fund at the College to support educational opportunities for paramedics. Olga's gift ended up leveraging an additional \$200,000 in support due to a bursary matching program that was available to the College. In the fall of 2012, the first bursaries from the Andrusiw – Niagara Paramedics Association Scholarship were given to ten paramedic students. A fund was also created at the Foundation to support in-service paramedic or first aid training.

“As a result of working with the Foundation and Sylvain Lepine of the Niagara Paramedics Association, Olga's desire to show her appreciation for the compassionate and sensitive treatment by paramedics was not only met but surpassed,” said Marg Cyr, executor of the estate. “It not only honours the paramedics, but also Olga and Larry Andrusiw, and demonstrates how a couple of even modest means can provide a remarkable gift which will benefit this and other communities in perpetuity.” *

SMITHVILLE & DISTRICT LIONS WILL ROAR FOREVER

Even though the Smithville & District Lions Club disbanded in 2012, one of the community projects it supported for many years will not be short-changed.

When the Club wrapped up its operations it had just over \$10,000 in the bank. Since the Lions were big supporters of West Lincoln Community Care, they wanted to find a way to continue their support while at the same time honour the work that the club had undertaken in its community. The solution was to turn to the Niagara Community Foundation.

At a cheque presentation on Sept. 24, former members of the Club were on hand with representatives of the food bank to make a donation of \$10,575 to the Niagara Community Foundation to create the Smithville & District Lions Club Fund, an endowment fund that will fund a grant annually to West Lincoln Community Care.

This is a positive resolution to a very difficult year for members of the Lions Club. The annual grant to the food bank will continue in perpetuity and will honour the role and contribution of the Smithville & District Lions Club to its community. *

TEACHER CREATES MUSICAL LEGACY

Carol Leppert devoted her life to teaching in Wainfleet and Port Colborne. Her love of music inspired many, some of whom went on to follow in her footsteps and become music teachers. Her students fondly remember that she never started a music class without her infamous pitch pipe.

Through a bequest, two funds have been created in Carol's name for students at Winger School and Steele Street School. The annual grant from each fund provides every student at both schools the opportunity to experience a live music or theatre performance. Each year one student from both schools will receive a bursary to the instrumental music program of the District School Board of Niagara (DSBN). Any remaining funds will be used to maintain or replace musical instruments at the two schools.

“Carol was a mentor to many teachers across Niagara, and is fondly remembered by her former colleagues, students and parents,” said Bill Mozina, president of the Education Foundation of Niagara (EFN). Carol's bequest was made to the EFN, which is working in partnership with the Niagara Community Foundation, as part of the EFN Planned Giving Program in support of DSBN Schools. For further information on this program, call Julie Densham at 905-641-2929 ext. 54104. *



CREATING LEGACIES FOR WAINFLEET AND PELHAM

2012 saw the birth of two new community funds.

With the support of the Wainfleet Township Council, the Wainfleet Community Fund, spearheaded by resident and Foundation board member, Kelly Robson, is now a reality. After presenting the concept to create a fund that would serve the Wainfleet community long into the future, council agreed and made a three-year commitment to put \$25,000 toward the launch of the fund.

The Robsons feel most fortunate to be part of such a caring community. “It’s been a great place to raise our family, because there is such a strong sense of community here,” says Kelly.

That caring spirit is something they want to nurture, provide for and contribute to. With this in mind, Kelly and Patrick opened the Robson Family Fund, Wainfleet’s first family fund. The earnings from their fund, in combination with those from the Wainfleet Community Fund, will be used to help Wainfleet continue showing the many ways it cares well into the future.

The Pelham Mayor’s Gala volunteers not only opened the Pelham Community Fund in 2012, but, thanks to the generosity of the community, raised the \$25,000 minimum in one year during the 2012 Mayor’s Gala. They plan to continue to support the Pelham Fund from future galas. In addition, as a 2012 Christmas gift to each other, Mayor Dave Augustyn and Carol Berkhout opened the Augustyn Berkhout Family Fund as the first named fund within the Pelham Community Fund. This family fund intends to create a legacy and mark the contributions that both families have made in building and improving Pelham. *

ADRIE'S HOUSE OF HOPE

In 2001, a woman lovingly called Mama Lumka, began providing hope and residential care for 16 children in her own home in Nomzamo, Somerset West, South Africa. Some of the children she cared for were disabled, some of them were HIV+ and some were AIDS orphans. All of them had been abused, neglected, abandoned and/or left by their parents. All had nowhere else to go.

Within a year, stories of Mama Lumka combing the township for neglected children and transporting them back to her home in a wheelbarrow reached the wider community. Land was purchased by the Nceduluntu Sanctuary Trust and a dream was born as foster homes were constructed on the site.

Today 32 children live in six homes on the sanctuary site, named IkhayaIthemba Village (meaning 'home of hope'). One of these homes is Adrie's House of Hope, built as a joint venture between the Rotary Clubs of Lincoln and Niagara-on-the-Lake. With the help of caring staff and many volunteers, the children are nurtured, provided with counseling, tutoring and health care.

The Rotary Club of Lincoln created the Adrie's House of Hope Fund. They remain committed to sustain this foster home and their vision is to grow the endowment to provide on-going support. *

LEAVING A LEGACY TO UKRAINIAN COMMUNITY

Dr. Jasoslaus Czerevko was a very caring doctor who took time with his patients and helped in many ways beyond providing medical assistance. He was that rare breed of doctor who still made house calls late into the night.

He was born in the Ukraine in 1921, studied medicine in Austria and came to Canada in 1948 to complete his internship and residency. Dr. Czerevko opened his practice in Niagara-on-the-Lake in the mid-50s. He closed his practice there in the early 1970s and subsequently opened a new practice in Fort Erie around 1972, finally retiring in September, 1991.

During his lifetime, the doctor supported a number of Ukrainian organizations. Through his estate, a gift of \$5.8 million was donated to the Foundation to establish the Dr. Jasoslaus and Mrs. Edith Czerevko Family Fund. With this gift, the capital is held in an endowment with the annual distribution supporting five Ukrainian-related charities:

- Ukrainian Canadian Congress Charitable and Educational Trust for programs serving Niagara
- Sts. Cyril & Methodius Church in St. Catharines
- Nativity of the Holy Mother of God Ukrainian Catholic Church in Niagara Falls
- St. John the Theologian Ukrainian Catholic Church in St. Catharines
- Ukrainian Canadian Social Services

Dr. Czerevko's gift has created a wonderful legacy in support of organizations important to him and his community. *

ENDOWMENT FUNDS CONTINUE TO GROW

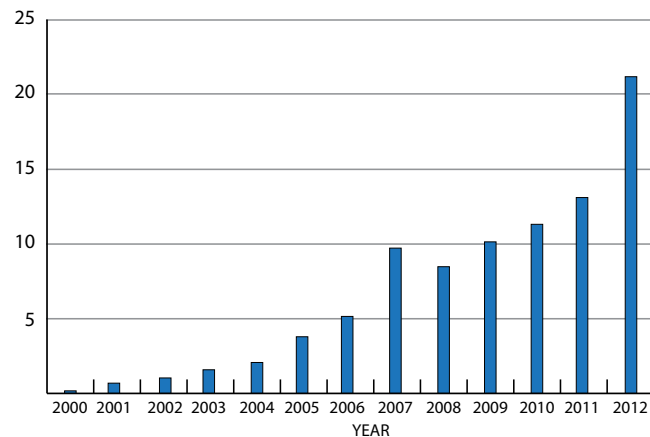
The Foundation has a different face to each of our donors. Their funds can support a particular cause, community or charity and once a fund is opened anyone can make gifts of any amount, in any way, at any time. Donations can also be made in honour or memory of a loved one.

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

Governor General David Johnson became the patron of Community Foundations of Canada in 2011. His vision to build smart and caring communities is based on three pillars: innovation, philanthropy and volunteerism. His vision meshes with our guiding principle to demonstrate philanthropic leadership. In recognition of his vision, we have renamed our unrestricted and community funds as our Smart and Caring Community Funds. These funds give the Foundation the greatest flexibility to respond to current community needs by providing grants to charities across Niagara. Applications are assessed by a group of volunteers based on specific criteria that are determined regularly by the board of directors.

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,

projects to help children and youth thrive, 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 with a gift of \$5,000, which can be gifted either on an annual or monthly basis over a 5 year period.

NIAGARA FUND

- Alice Downie-Bacon Com. Fund
- Branscombe Families Fund
- Canada GOATS Endowment Fund
- Caughill Family Fund
- Crawford Smith & Swallow Fund
- Dr. T. W. & Muriel O'Mulvenny Fund
- Elvi Vicary Fund
- Fallsview Casino Resort Fund
- George & Doris Shepherd Family Fund
- Jack and Nora Walker Fund
- John & Jan Potts Fund
- June Munro Fund
- Marv Kriluck Fund
- Meridian Credit Union Fund
- Niagara Fund
- Niagara Road Supervisors Association Fund
- Regional Chair's Smart and Caring Community Fund
- Waters & Meredith Fund

FORT ERIE FUND

- Fort Erie Fund
- Little-Green Family Fund

NIAGARA FALLS FUND

- *Americana-DiBellonia Family Fund
- Courtyard Marriott Hotel Fund
- DiCienzo Family Fund
- Embassy Suites Hotel Niagara Falls Fallsview Fund

- Hay Family Fund
- Hilton Niagara Falls Fallsview Fund
- Niagara Falls Community Fund
- Ripley's Great Wolf Lodge Fund

NIAGARA WEST FUND

- *Ericway Tire Community Fund
- Ken and Jennifer Southward Family Fund
- *Lincoln Chamber of Commerce Fund
- M. K. Rittenhouse Family Fund
- Matthew Zimmerman Memorial Fund
- Niagara West Community Fund

PELHAM FUND

- *Augustyn Berkhout Family Fund
- *Pelham Community Fund

PORT COLBORNE FUND

- Brend Butler Family Fund
- Dr. Scotty & Kay Wilson Legacy Fund
- Gary Talosi Thanks Port Colborne Fund
- Hartley & Florentine Wallace Fund
- John and Darlene Tuck Family Fund
- Marsh Family Fund
- Port Colborne Community Fund

ST. CATHARINES FUND

- 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

WAINFLEET FUND

- *Robson Family Fund
- Wainfleet Community Fund

WELLAND FUND

- 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

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 Community Impact Funds (CIF). These funds can be opened with \$25,000 which can be pledged over a five-year period. Once a fund is opened, donations of any amount can be added to any of the funds listed below. Named funds can be created within an existing CIF with a \$5,000 donation.

ANIMAL WELFARE

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

CHILDREN & YOUTH

- Ann Fast Fund
- Anna Angelone Endowment Fund
- Big Brothers Big Sisters Endowment Fund
- *Brend Butler Family Fund 4
- Brock Finance & Investment Group FT Fund
- Charron Family Fund
- *Children & Youth Fund for Niagara
- Groch Family Fund
- Investing in St. Catharines Youth Fund
- Ontario Endowment for Children & Youth in Recreation
- Richard and Cathy Gark Family Fund
- Robert A. Lavelle Memorial Fund
- Secord Reid Family Fund
- Sun Media Children's Summer Camp Fund
- Young Children Priority First - Kiwanis Fund

CULTURE

- Arthur Dalfen Fund
- Arts & Heritage Community Development Fund for the Old Town of NOTL and Village of Queenston
- Audrey Shimizu Memorial Fund

ENDOWMENT FUNDS CONTINUE TO GROW

- Carol Leppert Music Fund for Steele Street School
- Carol Leppert Music Fund for Winger Public School
- Cultural Endowment Fund for Niagara
- *Grimsby Museum Endowment Fund
- Mayholme Foundation Fund
- Niagara Children's Chorus Fund
- NOTL B&B Association Fund
- NOTL Library Michael Dietsch Fund
- *Regan Peacock-Fung Memorial Art Fund
- *Smylski-Attenborough Fund
- Valentina McLeod Fund

EDUCATION & LEADERSHIP

- Adult Literacy Council of Greater Fort Erie Fund
- Alice Downie- Bacon Designated Fund
- CFUW St. Catharines Endowment Fund
- Children of Niagara's Migrant Workers Award Endowment Fund
- DiCienzo Family FT Fund
- *Education & Leadership Fund for Niagara
- Education Foundation of Niagara Fund
- Education Foundation of Niagara Poverty & Emergency Relief Fund
- Gene Luczkiw Spirit of Enterprise Endowment Fund
- Grape & Wine Education Research Fund
- John-Micheal Martin Memorial Fund
- *Jordan Engineering Jane Cunningham Fund
- Larry and Olga Andrusiw Paramedic Award Fund
- Niagara Engineering Week Scholarship Fund
- Niagara Falls Big Brothers Big Sisters Scholarship Fund
- Niagara Peninsula Energy Award Fund
- Stephen Souter Memorial Fund
- Sunday in the Parks Fund

ENVIRONMENT

- *Bert Miller Nature Club Endowment Fund
- Conservation Niagara Fund
- Enbridge Awaire Fund
- Environment Legacy Fund
- Environmental Legacy Fund for Niagara West
- Fagate Realty Group Environment Fund
- Fort Erie Conservation Club Fund
- Friends of Fort Erie's Creeks Fund
- G. E. Galbraith Electric Ltd. Fund
- Harry Deline Fund
- Land Care Niagara Fund
- Nelson Aggregate Environmental Fund
- Niagara CAER Group Fund

- Niagara Land Trust Endowment Fund
- Regional Chair's Environmental Legacy Fund for Niagara
- Roll Surface Technologies Inc. Fund
- RV Anderson Associates Fund
- RWDI Air Inc. Fund
- Samuel L. Rudolph Memorial Fund
- Urban & Environmental Mgmt Fund
- W. S. Tyler Canada Environmental Fund
- Walker Industries Earth 1st Fund
- Walter & Sons Excavating Environment Fund

HEALTH & WELL-BEING

- 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
- Headway Homes Fund
- *Health & Well-being Fund for Niagara
- Hospice Niagara Fund
- Joan E Marlow Salvation Army Endowment Fund
- Joan E. Marlow YWCA Endowment Fund
- *Joan Tovenati Fund
- Luigi & Amelia Setacci Health Niagara Fund
- Mark Graham Memorial Endowment Fund
- *Mayflowers Fund
- McNally House Endowment Fund
- Morabito Family Fund
- Necklaces of Hope Foundation
- Niagara Survivor Services Fund
- Patrick & Nancy McNally Family Fund
- Rankin Cancer Run Foundation
- Schizophrenia Research 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
- Monastery of Mount Carmel 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.

- Beatties Basics Anniversary Fund
- Brunatti-Dyment Fund
- Cornelius & Helen Vanden Top Charity Fund
- Donald & Barbara Fraser Family Endowment Fund
- George Darte Funeral Chapel Fund
- Ida & Bob Gale Sr. Community Fund
- Jordan Engineering Shared Blessings Fund
- M&N Walker Foundation
- Marchand Kruczynski Family Fund
- Morgan Funeral Home Community Fund
- Peter Partridge & Poppy Gilliam Family Fund
- Rosanne's Cancer Prevention Fund
- Rosanne's Chronic Care Support Fund
- Stewart Family Endowment Fund
- Sullivan Mahoney Endowment Fund
- Welland Flatwater 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
- *Dr. Jaroslaus and Mrs. Edith Czerevko Family Fund
- Art & Val Fleming Fund
- Bob Gale Recreation Fund
- Cornelius & Helen Vanden Top Charity Foundation
- Hildebrand Lehn Family Fund
- Joan E. Marlow Fund
- Kiers Family Fund
- Lincoln County Fair Endowment Fund
- NCF Operational Endowment Fund
- *Smithville and District Lions Club Fund
- Tom and Mary Cronin Fund
- Wills Family Foundation

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During 2012 gifts were received by the Foundation in honour or in memory of the following individuals:

John R. "Jack" Adam, Beverly Ballett, Amato Biancanello, Sam Bloom, Sharon Branton, Sarah Burroughs, Rebecca Cann, Bernice Caplan, Frank Caplan, Libby Caplan, Jim Coy, Jane Crews, Sandy Crews, Marcello Cristiano, Aimee Cross, Mady Fitzgibbon, Art Fleming, Laurence Geisenhoff, Fabianna Gignac, Edward A. Grimwood, David Grocock, Mel Groom, Chris Guiltinan, Douglas Haner, Mary Irene Haslam, Mary Anne Longhurst and Helen Blankhorn, Irvin Katzman, Deb Kehler, Nadine Lalani, Stevee Levee, Gladys Loat Richardson, Sophie Migus, Rita Mirabelli, Madeline Muir, Bill Newell, Gina Nitsopoulos, Robert Peacock, Regan Peacock-Fung, Brielle Philippe, Chantale Philippe, Eric Philippe, Jacqueline Philippe, Jesse Philippe, Melanie Philippe, Quinn Philippe, Melissa Philippe-Free, Don Pickston, Debbie Pratt, Arnold Rawsthorn, Dolores Rosenbaum, Jessie Mary Norman Nelson Ross, Angelina Santone, Bill Shaphren, Dianne Silver, Gary Silver, Jenny Simpson, Debbie Slade, Louise Sparks, Karen Stearne and David Fast, Suki, Clarisse Tonigussi, Mylo Tonigussi, Paloma Tonigussi, Santino Tonigussi, Savannah Tonigussi, John & Norris Walker, Jean Wellington, Brian Woronchak, Kenny Woronchak, Meganne Woronchak, Philip Woronchak, Scott Woronchak

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:

anonymous donor, Debra Attenborough, Norm Bradshaw, Anne-Louise Branscombe, Elizabeth Connor-Elliott, John P. Cunningham, Rachel Delaney, Rich Gark, Roman Groch, John Habuda & Leona Vaillancourt, Brian Harrison and Daryl Novak, Sandra Durward, Brad Hutchings, Anne Kemp, Sharon Kirk, Mary Mauriello, Greg & Rena McDonald, Liz Palmieri, Barbara Romans, Ria Rosenberg & Stephen Levy, Marc & Deb Slade, Chuck & Judy Smith, Betty-Lou Souter, Graham & Pearl Sweeting, Jessie Thompson and Carl & Eileen Urben, Doug Whyte.

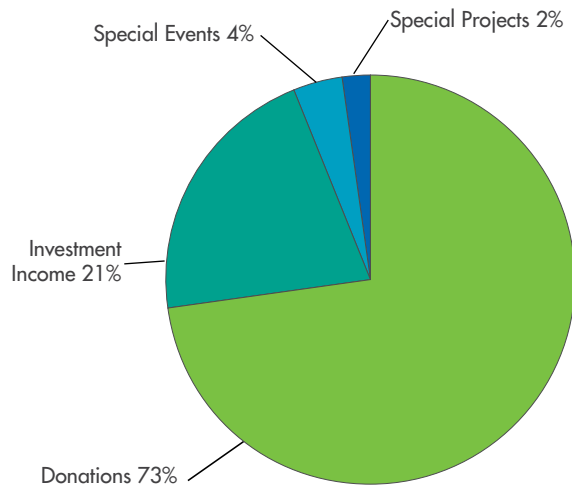
FINANCIAL HIGHLIGHTS

FOR THE YEAR END DECEMBER 31, 2012

	2012	2011
Total Assets	\$21,327,839	\$13,152,675
Gross Fundraising and Event Revenue	\$376,748	\$321,922
Total Donations	\$6,837,288	\$2,949,485
Total Revenue	\$9,438,935	\$3,434,607
Total Grants & Charitable Programs	\$659,381	\$984,863
Total Special Project	\$211,451	\$204,862
Total Fundraising Expenses	\$281,085	\$251,674
Total Administrative and Governance Expenses	\$237,642	\$211,235
Total Endowment	\$20,961,446	\$12,881,726
% of Admin/Governance to Total Revenue	3%	6%
% of Fundraising Expenses to Total Revenue	3%	7%

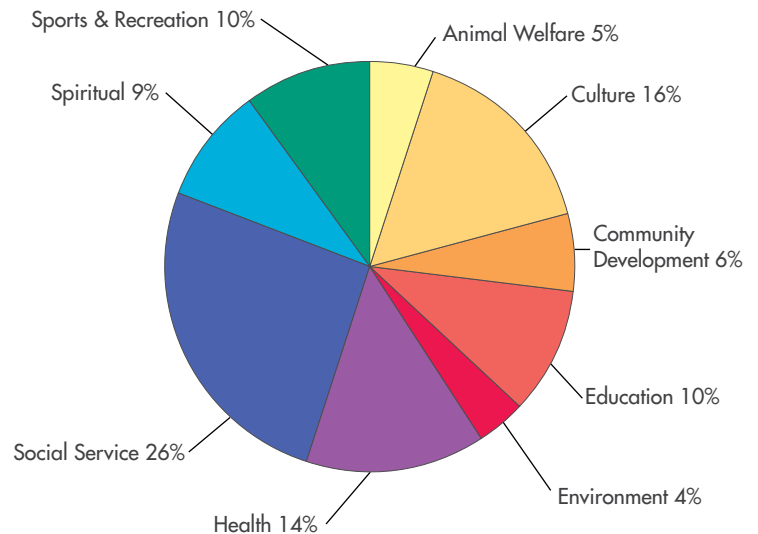
SOURCE OF REVENUE

\$9,938,935



ALLOCATION TO GRANTS & CHARITABLE PROGRAMS

\$659,381



To view the audited financial statements, please visit: 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. The Foundation also received funding in 2012 from Niagara Region to support the position of Convenor for the Niagara Prosperity Initiative. This funding enables us to bring community groups together to guide poverty reduction initiatives. We also hosted the activities of Niagara Connects (formerly the Niagara Research and Planning Council) which, among other initiatives, produced the 2011 Living in Niagara Report. The recommendations in this report enable the Foundation to ensure that our discretionary grant programs address community priorities.

Fund development, administration and governance expenses for the fiscal year ended December 31, 2012 totaled \$518,727. 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 operating expenses to average total assets. For 2012, that percentage was 2.5%, within 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 per cent which helps to offset these expenses.

INVESTMENT FEES AND RETURNS

The Foundation's investments are pooled with a number of other public foundations and charities in an investment pool with the Toronto Community Foundation. 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. All portfolios are managed by professional investment managers and in accordance with the policy.

ASSET MIX AND TARGETS	
Asset Mix	Target
Cash and cash equivalents	0 per cent to 50 per cent
Equities and alternate strategies	50 per cent to 95 per cent
Fixed income	5 per cent to 50 per cent

The average investment fee paid for 2012 was 0.62 per cent. This fee is charged to each fund on a pro-rated basis. Investments returned 12.17 per cent in 2012 compared to market index of 7.34 per cent. The 3-year annualized return was 6.96 per cent.

FINANCIAL AND GOVERNANCE HIGHLIGHTS CONTINUED

In November, the board of the Foundation made a commitment to invest \$500,000 in the Community Forward Fund, a social finance investment fund. The returns for this investment will be reflected in the 2013 report.

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 annually reviews the Foundation's exposure to risk and mitigants to address perceived or actual risks. 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.

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.

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. 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 2012, the Executive Director received a salary of \$84,703 plus 8 per cent benefits.

BOARD RECRUITMENT, ORIENTATION AND TRAINING

The Bylaws of the Foundation set out the Board recruitment process. Members of the Nominating Committee are selected by virtue of office and include the Immediate Past Chairman of the Foundation Board, Niagara Regional Chair, the President or designate of the United Way of St. Catharines and District, Niagara Falls and Greater Fort Erie, and South Niagara, a local Judge of the Superior Court of Justice of the Judicial Districts of Niagara North or South, the President of Brock University or the President of Niagara College. 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 2011 WE BEGAN TRACKING THE NUMBER OF HOURS OUR VOLUNTEERS CONTRIBUTED. BASED ON \$15/HR THEIR 2,134 HOURS OF TIME CONTRIBUTED TOTALED OVER \$32,000 IN SUPPORT IN 2012! THANK YOU FOR THIS GIFT.

BOARD OF DIRECTORS

Jodi Lycett (Chair)

Partner, Durward Jones
Barkwell & Co. LLP

Mel Groom (Past-Chair)

Investment Advisor,
RBC Dominion Securities

Madeline Woodhead

(Vice-Chair)
Investment Advisor,
Scotia McLeod

Christopher Wilson (Secretary)

Partner, Wilson, Opatovsky,
Barristers and Solicitors

Rena McDonald (Treasurer)

CFO, The Drake Hotel

DIRECTORS

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President, Body Science Ltd.

Bill Charron

Retired, former Executive
Director Family & Children's
Services Niagara

Dino DiCienzo

Canadian Niagara Hotels

Denise Elliott

Partner, Martin Shephard
Fraser LLP

John Fisher

President and CEO of Walker
Industries Holdings Ltd.

Rich Gark

Retired, Scotiabank

Alan Goddard

Retired, Vice President
Corporate Affairs Canadian
Tire Corp.

Damian Goulbourne

Professor, Niagara College

Paul Jones

Human Resources Manager,
Canadian Mental Health Assoc.
- Niagara

Kelly Robson

Administrative Assistant, for
general surgeon Dr. Darrell
Baker

Rob Welch

Partner, Lancaster Brooks &
Welch LLP

Doug Whitty

President, 13th Street Winery
and Whitty Farms

AMBASSADORS

John Armstrong Brian Babcock, Ann-Louise Branscombe, Frank Caplan, Pat Darte, Andrea Douglas, Eric Gilbert, Brad Hutchings, Sean Jackson, Paul Leon, Maria Menechella, Shirley Martin, Victor Muratori, Rob Neill, Eugene Oatley, John Palumbo, Stan Pettit, John Potts, Betty-Lou Souter, Wade Stayzer, Mary Turner

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Don Knechtel, Liz Palmieri (Staff), Wendy Rittenhouse

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Partridge Jr. (Chair)

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Damian Goulbourne, Mel Groom, Liz Palmieri (Staff), Madeline Woodhead

WAINFLEET FUND ADVISORY COMMITTEE

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Sharon Svob, Liz Palmieri (Staff)

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Ross Macfarlane, Liz Palmieri (Staff)

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Krick (Staff), Mike Lethby, Rick Merritt (Staff), Liz Palmieri (Staff), Carol
Stewart-Kirkby, Rob Welch (Chair), Madeline Woodhead

FINANCE COMMITTEE

Dino DiCienzo, Alan Goddard, Judith Hill (Accountant), Laura Hills,
Jodi Lycett, Rena McDonald (Chair), Liz Palmieri (Staff), Brian Wilkie

THANK YOU TO OUR **SUPPORTERS** CONTINUED

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GRANTS COMMITTEE

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INVESTMENT COMMITTEE

Mario Ferrara, Alan Goddard, Steve Hudson, Jodi Lycett, Rena McDonald, Peter Nixon, Liz Palmieri (Staff), Madeline Woodhead (Chair)

NOMINATING COMMITTEE

Sharon Aloian, Gary Burroughs, Steve Hudson, Brad Hutchings (Chair), Theresa Maddalena, Rick Prior, Tammy Sweeney, Liz Palmieri (Staff)

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Chris Alderson, John Armstrong, Christopher Blake, Alan Goddard, Gord Hunchak, Greg Medulun, Darrell Neufeld, Denise Papaiz

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RANDOM ACTS OF KINDNESS COMMITTEE

Lauri Brady, Marisa Brown-Benson, Hilary Canivet, Christie Cassidy, Draj Fozard, Scott Glover, Filomena Goldsworthy, AJ Haig, JoAnne Krick (Staff), Peter Kryger, Deborah Ogilvie, Carol Stewart-Kirkby

RANDOM ACTS OF KINDNESS SPONSORS

105.7 EZ Rock, 97.7 HTS FM, Brock University, Centre de santé Communautaire Hamilton/Niagara, District School Board of Niagara, Giant FM 91.7, Fallsview Casino Resort & Casino Niagara, Meridian Credit Union, NewsTalk 610 CKTB, Niagara Catholic District School Board, Niagara College, Niagara Region, PenFinancial Credit Union, Sun Media Niagara Publishing Group, TV Cogeco Niagara, Tim Hortons, United Way, Walker Industries, YMCA of Niagara

11TH ANNUAL CANADIAN BUSINESS LEADERS

BREAKFAST SPONSORS

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STAFF

Liz Palmieri (Executive Director), Orla Fitzpatrick Newhouse (Administrative Co-ordinator), JoAnne Krick, (Community Initiatives Manager), Judy Hill (Accountant), Chris Bangham (Asset Development Associate), Rick Merritt (Niagara Prosperity Initiative Convener), Bea Taylor (Office Volunteer)



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