



We link your legacy to your community...**forever.**

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ANNUAL REPORT

our VISION

Building a healthy Niagara by promoting philanthropy and providing opportunities that link caring people to community forever.

our MISSION

The Niagara Community Foundation:

- builds endowments focusing on Niagara's community needs
- grants monies with integrity, sensitivity and creativity
- collaborates with the community and individuals to meet the philanthropic goals of the donors and the needs of the community
- facilitates individual gifts that will have a long term benefit for the community

guiding PRINCIPLES

We seek recognized leaders who through their skills bring leadership to the community. We nurture and build on our community's strengths and assets. We engage in practices that are open and accessible, fair and objective, flexible and timely. We form, encourage and support collaborations and partnerships. We evaluate our activities to improve our skills and knowledge and we will share key findings with others. Because our core activities are interdependent, we commit to balance our human and financial resources among them. These guiding principles are essential to our role as credible and reputable stewards of community resources.

The logo for the Niagara Community Foundation features two curved, overlapping lines. The upper line is dark green and the lower line is a lighter, golden-brown color. They are positioned above the text 'NIAGARA COMMUNITY FOUNDATION'.

NIAGARA COMMUNITY FOUNDATION

2003 Year in Review



People, projects and partnerships – the essence of the work of your community foundation.

It is through the support, time and energy of many people that the foundation met with on-going success in 2003. We continue to be amazed at the generosity of our donors as they found new ways to partner with the foundation to achieve their philanthropic dreams. Our volunteers were unrelenting in their commitment as they provided their expertise to help us achieve our goals. And our staff provided the support and resources to keep our operations moving forward smoothly.

We would like to acknowledge the contributions of two volunteers in particular who were instrumental to our success – the late Frank Branscombe and former regional chair Debbie Zimmerman. Their tireless encouragement, arm-twisting, door-knocking and support enabled the foundation to open its doors and achieve early success. Their work, together with that of our Steering Committee and board, is now promoted as a model for success for new community foundations across Canada.

Partnerships and collaborations are always a challenge in our field and we were blessed with several achievements in 2003. We partnered with the J. W. McConnell Family Foundation from Montreal to launch several initiatives that will help our foundation with our environmental grantmaking. We worked with both private and public funders to deliver a Funders Roundtable, providing local organizations with resources and tools to assist with their operations. In addition, we successfully promoted the Benjamin Moore Grants offered by Community Foundations of Canada. Two groups from Niagara were the beneficiaries of this program – the Lupus Foundation and the Welland Museum.

Our granting programs continued to grow, both our discretionary programs and those involving donor funds. In this report you will find more about several of the projects we supported in 2003.

Winston Churchill once said “what is the use of living if it be not to strive for noble causes and to make this muddled world a better place for those who will live in it after we are gone.”

We could not agree more.

Ann-Louise Branscombe
President and Board Chair

Liz Palmieri
Executive Director

Charity begins at home but should not end there.

– Scottish proverb

PEOPLE who make a difference



Frank A. Branscombe (February 21, 1918 – February 24, 2003)

Frank Branscombe was a remarkable individual. His vision and work to create the Niagara Community Foundation were recognized through naming him our Honourary Patron. The following are excerpts from his eulogy given by his dear friend Frank Leslie.

We sit today filled with memories of a most remarkable man. It can be said that no one has had any greater impact on the City of Niagara Falls...and absolutely no one has left such a valuable legacy.

All Frank's time and effort given to growing business interests had two objectives... first to provide for his family. But there was a larger objective. And that was to give back, to provide for a much larger family...the people of his community and the world beyond through the ongoing, lasting, positive impact of The Branscombe Family Foundation, founded in 1977 by F.A. and Mildred.

Well over a thousand local young people have received major assistance with their post-secondary education from the foundation. Every hospital in Niagara, Niagara College, Brock University and Huron College have benefited substantially. Foods banks, school breakfast programs, Family & Children's Services, Rotary, children's camps... the list goes on.

F.A. was truly unique and intriguing, one of a kind, complex, far-sighted, possessed of a keen intelligence and an imaginative optimism. Certainly he was forceful and demanded much of himself and others...but he had a heart of gold. Yes, he will remain fondly in our thoughts. And in those thoughts he will be remembered most of all for his caring, his compassion and his generosity.

Making a difference

Back in 2001, Karen Stearne approached foundation director, Ann-Louise Branscombe about organizing an event to benefit the foundation. Three years and over \$30,000 later Karen's vision became a reality. Gathering together a group of accomplished volunteers, they created Sunday in the Parks, a wonderful garden party at the Niagara Parks Botanical Gardens. Their aim was to open an endowed fund, appropriately named the Sunday in the Parks Fund, to support projects which encourage the advancement of women and girls. The first grant from the fund was awarded in 2003 for the Literacy Council of Niagara West's Skills for Success program. This is a series of 10 workshops taking place in West Lincoln for women to help develop self-confidence, improve self-esteem and feel stronger, the intangible prerequisites for any learning to take place.

The final garden party for the fund was held in August on one of those hot, glorious summer days. The Fund remains as a testament to this group of friends who made a difference and who will continue to make a difference in the lives of women long into the future.

We make a living
by what we get
We make a life
by what we give

– Winston Churchill

ENDOWMENT FUNDS continue to grow

The Foundation's endowment grew to \$1.7 million in 2003. Our staff and volunteers met with each donor to determine the type of fund most appropriate to his or her philanthropic intent. Thanks to our donors for using the foundation as the means to leave a legacy to the community.

Community Fund

A donation to this fund gives the Foundation the greatest flexibility. The earnings on this fund enable our board of directors to respond to current community needs through the provision of grants to charities throughout Niagara. Donors can establish a named fund within our Community Fund with a \$5,000 gift. Donors interested in supporting future community needs are able to make a contribution of any size to the Community Fund.

- Alice Helene Downie Bacon Fund
- Branscombe Families Fund
- Crawford, Smith and Swallow Fund
- Jan and John Potts Fund
- Niagara Credit Union Fund
- Waters & Meredith Fund

Donor Designated Fund

This type of fund gives donors the opportunity to specify, at the time the fund is established, which particular charities they would like to support in perpetuity. If unexpectedly an organization ceases to exist, we can redirect the funds to a similar cause. The minimum donation to open a designated fund is \$10,000 per beneficiary.

- Alice Helene Downie Bacon Education Fund
- Anita Skinner Fund
- Church of the Transfiguration Education Fund
- Joan E. Marlow Memorial Fund
- Luigi and Amalia Setacci Fund
- Mayholme Foundation Fund
- Morabito Family Fund

Donor Advised Fund

This fund enables donors to have ongoing participation in the selection of charities that will benefit from their gift. Donors may choose this type of fund instead of creating a family trust or private foundation. The minimum donation to open a donor advised fund is \$25,000.

- Casino Niagara Cares Fund
- Donald and Barbara Fraser Family Fund
- Morgan Funeral Home Community Fund
- Niagara Engineering Week Scholarship Fund
- Niagara Road Supervisors Fund
- Sullivan Mahoney Endowment Fund

Field of Interest Funds

These funds work much like our Community Fund, except that donors identify an area of interest that they would like to target with their support. The minimum donation to open a field of interest fund is \$25,000. However, once established, other donors with similar interests are able to make a contribution of any size to these funds.

- Environmental Legacy Fund
- Ontario Endowment for Children and Youth in Recreation Fund
- Sunday in the Parks Fund

Charitable Endowment Funds

These funds are created and administered by the Foundation on behalf of registered charities. This allows the organization freedom from investment responsibility and gives donors the confidence of knowing that a permanent foundation is in place to professionally administer the charity's endowment. Once established, the charity can encourage its donors to contribute to its endowment fund. A donation of \$10,000 opens this fund.

- Niagara on the Lake Library – Michael Dietsch Family Fund
- Niagara Survivor Services Fund

Local Community Funds or Affiliates

These funds support the work of charities operating within a particular Niagara municipality and operate much like our Community Fund identified above. The minimum donation to open this type of fund is \$25,000 and once opened, named funds can be created with gifts of \$5,000.

- St. Catharines Community Fund
 - Durward Jones Barkwell & Company LLP Fund
 - Whyte Family Endowment Fund
- Welland Community Fund
 - Anonymous Donor Fund

PROJECTS

He who gives
when he is asked
has waited too long

– Lucius Annaeus Seneca

Niagara Falls Big Brothers Big Sisters

Communication within the family was identified by this agency's caseworkers as a concern raised by parents/guardians of youth aged 12 and over. A successful project was piloted in the spring of 2003, involving only young women and their mothers, with the most dramatic improvement coming in the awareness of community resources.

Big Brothers Big Sisters approached the foundation for a grant to expand the program into a 16-week project aimed at males and their parent/guardian. The foundation supported this project with a grant of \$1,000 recognizing the positive outcomes that could be achieved – improved interpersonal communication skills, increased awareness of community supports and the potential to avert problems amongst youth at risk. The Niagara Road Supervisors Association Fund partnered with the foundation in supporting this project.

Fort Erie Multicultural Centre

Crossing the border at the Peace Bridge as a newcomer to Canada is a worrisome experience, especially for children. A grant of \$2,000 was awarded to underwrite the cost of developing a prototype Welcome Kit for the children of newcomers. The kit will be of immediate benefit to anxious children as their parent(s) are processed by Immigration Officers, an ordeal that can take up to eight hours. The project was developed in collaboration with many agencies serving immigrants and refugees across Niagara. This Welcome Kit will be the first of its kind in Canada and will be a proactive way of researching and building a tool that has the potential to provide both comfort and an important first message to children who are undergoing an extremely stressful and emotionally draining experience.

Niagara Peninsula Conservation Authority

Morgan's Point consists of 28 acres of environmentally significant land located on the shores of Lake Erie in Wainfleet. Recently acquired by the Authority, a long-term strategy to guide the restoration and conservation of this regionally significant area was developed, as it has been severely impacted by human use and a degrading ecosystem is currently prevalent on the site.

The Foundation's grant of \$6,500 will be used to restore the dynamic sand dunes and ecological integrity of one of the last remaining public access points to the Lake Erie shoreline. Restoring the degraded sand dune system by installing drift fencing, planting native beach grasses, installing boardwalks to guide pedestrian traffic and installing rock vehicle access barriers will reestablish the plant community and habitat for threatened and endangered wildlife.

Our community will benefit from this project by having access to this naturalized area that can also be used as a teaching tool and template for future restoration initiatives.



GRANTS awarded in 2003

Fifty grants totaling \$137,691. were awarded either from our community grants programs or from our donor directed funds.

Alzheimer Society	\$ 1,000.00
Autism Society of Ontario - Niagara Region Chapter	\$ 600.00
Brock University	\$ 500.00
Brock University	\$ 450.00
Canadian Cancer Society	\$ 5,000.00
Canadian Diabetes Association	\$ 900.00
Carousel Players	\$ 750.00
Niagara Region Sexual Assault Centre (CARSA)	\$ 1,000.00
City of Niagara Falls - Heritage Week Committee	\$ 1,000.00
CNIB - Ontario Division - Niagara Branch	\$ 1,000.00
Community Living - Grimsby/Lincoln	\$ 570.00
Durham College	\$ 500.00
Early Childhood Community Development Centre	\$ 1,500.00
Fort Erie Community YMCA	\$ 500.00
Fort Erie Multicultural Centre	\$ 2,000.00
Heart & Stroke Foundation	\$ 1,000.00
Heart Niagara	\$ 7,476.96
Lincoln County Humane Society	\$ 1,000.00
Literacy Council of Niagara West	\$ 2,450.00
Lions Foundation	\$ 1,000.00
McMaster University	\$ 500.00
Multiple Sclerosis Society of Canada	\$ 2,000.00
Multiple Sclerosis Society of Canada	\$ 1,000.00
Niagara Action for Animals	\$ 1,000.00
Niagara Artist's Company	\$ 1,700.00
Niagara Child Development Centre	\$ 1,262.00
Niagara Falls Big Brothers Big Sisters Association Inc.	\$ 1,000.00
Niagara Falls Big Brothers Big Sisters Association Inc.	\$ 500.00
Niagara Foundation for Family and Children's Services	\$ 1,024.00
Niagara Peninsula Conservation Foundation	\$ 6,500.00
Niagara Restoration Council	\$ 6,000.00
Niagara Support Services	\$ 822.00
Niagara Symphony Association	\$ 645.00
Ontario Society For Crippled Children	\$ 992.00
Osteoporosis Society of Canada	\$ 1,000.00
Port Colborne CARES	\$ 1,300.00
Project Share	\$ 10,000.00
Regional Municipality of Niagara - Community Services Dept. - Pro-Kids Initiative	\$ 2,100.00
Regional Municipality of Niagara - Greater Niagara Circle Route Trail	\$ 31,981.32
St. Catharines Resource Service for Youth (The RAFT)	\$ 1,500.00
The Gallery Players of Niagara	\$ 500.00
The Niagara Parks Foundation	\$ 1,000.00
Thorold Community Activities Group	\$ 550.00
Town of Grimsby	\$ 610.00
Welland District Association for Community Living	\$ 780.00
West Lincoln Memorial Hospital Foundation	\$ 25,000.00
Women's Place (St. Catharines & District)	\$ 1,000.00
Women's Resource Centre	\$ 1,400.00
YMCA of Niagara	\$ 2,728.00
YWCA of St. Catharines	\$ 1,100.00

He who obtains has little
He who scatters has much

- Lao Tzu

thank YOU!

The contribution of time and talents of our volunteers, donors and staff is the 'intangible wealth' of the foundation.

Board of Directors

Brian Babcock, Ann-Louise Branscombe (President), Frank Caplan (representing St. Catharines Community Fund), Pat Darte (Secretary), Eric Gilbert, Mel Groom, Brad Hutchings (Treasurer), Sean Jackson, Andrea Kriluck (Vice-President), Paul Leon, Victor Muratori, Robert Neill, John Palumbo, Stan Pettit, John Potts (Past-President), Betty-Lou Souter, Norris Walker.
Honorary Patron - Debbie Zimmerman

St. Catharines Community Fund Advisory Board and Volunteers

Rosemary Auld, Linda Bramble, Roy Cairns, Frank Caplan (Secretary), Harry Daniel, Rosalyn Hatch, David Howes (Vice-Chair), Vicki Little, Ron Matsushita, Peter Partridge Jr., Bob Ruttan, Mark Sherk, Paul Speck, Doug Whyte (Chair), Don Wiley

Welland Community Fund Advisors

Gordon Burnett, Albert Iannantuono, Paul Leon, Allan Root

Staff

Liz Palmieri (Executive Director),
Teri O'Neill (Foundation Executive Assistant to November),
Lisa Berketto (Bookkeeper)

Volunteers

Martha Abra, Frank Adamson, Dr. David Atkinson, Bill Amadio, Jocelyn Baker, Dean Bell, Dennis Bell, Chris Blake, Randy Boyce, Peter Brown, Jason Burgess, Steve Butz, Rebecca Cann, Christine Clark, Bernadette Corbin, Greg de Prinse, Rob Diermair, Sande Farrauto, Manfred Fast, Bill Finley, Tim Foster, Derek Fretz, Rick Hatt, Laura Hills, Steve Hudson, Anne Kemp, Dan McDonell, Rosanne Marsh, Terry McDougall, Maria Menechella, Jay Merrin, Dave Morgan, Ernie Morgan, Darrell Neufeld, Gary Niven, Larry Oates, Steve O'Brien, Steve Oprici, Ted Palmer, Dr. Andy Panko, Peter Papp, Dan Patterson, Michael Philbrick, John Rednall, Jennifer Ricci, Andrea Sinclair, Sandra Skog, Sonya Smith, Wade Stayzer, Laura Stones, Carol Stymiest, Donald J. Taliano

Sponsors

Niagara Credit Union, The Pen Centre, Scotia McLeod

2003 donors

Thank you to the following donors for their gifts to the foundation or to a fund created in memory of a loved one. Every effort has been made to ensure accuracy in the list. However, if your name has been omitted, misspelled or incorrectly placed, please accept our apology and let us know.

1267034 Ontario Inc.
958038 Ontario Ltd.
Frank Adamson
Aids Niagara
Alderson Caters and Hardy
George & Susan Alexander
Mary Alfieri
Algoma Central Corporation
Janet Allan
Michael Allen
Jo-Ann Allen
Cora Allenbach
Bill Amadio
Anonymous
Patricia Anzovino
Norm Armitage
Gloria Armstrong
Associated Engineering (ONT) Ltd.
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Scott & Mary Lynne Atkinson
Rosemary Austin
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Dagmar Ayotte
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Barcados Family
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Jim Bradley
Michael Brady
A. L. Branscombe
Winnifred Branscombe
Mildred Branscombe
Branscombe Family Foundation
Brock University - Office of External Relations
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Sharon Broderick & Peter Barr
Betty Brown
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Julie Bowen & Jeff Brunskill
Doreen Buckley
Connie & Clark Bucknall
Jean Bullivant
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J. R. Bush
Marjorie Cain
Brenda Calisina
Gwen M. Calvert
Elspeth Cameron
Canada GOAT INC.
Canadian Tire Financial Services Ltd.
Dina & Frank Caplan
Jill Cappa
Elena Carlomusto
Lena Carmer
Michael Carroll
John & Bev Carter
Casino Niagara
Harold Caswell
CH2M Hill Canada Limited
Robert Chagnon
Helen Chalcraft
Bob & Sandy Channell
Charter Building
Rosemary Chew
Patrick Chiarelli
Mr. & Mrs. Art Christenson
Bill & Denise Chuchman
Terry Anne Churchill
Municipal Offices City of Port Colborne
Lillian Clark
Miriam Clark
Lois & George Clarke
Betsy Clarke & Family
Jane Clarkson
Jeanne Codrington
Mike Collins
Elizabeth Collins
James Conte
Katherine Conway
Jan & Lori Cook
John Corfield
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Ron Cowan
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Jackie Crothers
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George Dalby
Joe Dallal
Carmelina D'Angelo
Rosie D'Aprile
Jim Davey
Tom Davey
Peter Davidson
Peggy Davidson
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John De Forge
Heather Deans
Mary Lou Decou
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Michael Del Ben
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Delcan Engineers Planners Architects
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Ken & Ginny Douglas
Stephen & Phyllis Drake
Helen Driffield
Rick & Terry Driffield
Joan Dube
Mildred Ducker
Sandra Duncan
Diane Dunk
Michele Dunton

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Earth Tech Canada Inc.	Nancy & Bob Iannizzi	William McCarthy	Doris Pettifer	Catharine C.Spencer
Jim Eckert	Doug Ingham	Tom McClintock	Isabell Phelps	Tiffany Pope & Jason Spencer
EDS Canada	Darlene Inglis	McCormick Rankin	Lawrence Philip	Kirsten Spencer
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Stephen Forgeron	Edy Katzman	Laura Menechella	Heather Pullen	Tom Tanaka
Jane Foss	Brian & Audrey Kealey	June & Ron Mergl	Jennifer Purcer	Rosemonde Tannous
Ryan Foster	Diane Keenan	Richard Merritt	Anthony W. Pylypuk	Patricia Tasane
Derek Fraser	Anne Kemp	Jane & Miles Merwin	Brent & Shelley Pym	Neil & Diane Taylor
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Janet Fraser	Robert Kerr	Linda & Glenn Meyers	Rankin Construction Inc.	James Tebble
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Bruce Green	Krista Lambert	Maureen Murphy	Diane Roland	Norm Tubbe
Grey Gables School	Brian Lambie	Carol Myers	Rotary Club of St. Catharines South	Betty Tucker
Grimby Fire Fighters Association	Roy & Peggy Lampard	Robert Nemcko	Elizabeth Rothmal	Graham & Mary Turner
Ron & Fran Gropp	Susan Lampman	John Nemy	Paul & Joan Rotz	Upper Lakes Group Inc.
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Martin & Cathy Hall	Susan Lee	Niagara Engineering Week	Russell Associates	Darryl Vitone
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Janice Horner	Bob & Kathy Martin	Sheena Patterson	Hilary Ruth Skilnyk	YWCA of St. Catharines
Joseph Horvath	Carmen Masi	Fiona Peacefull	Bob Smith	Sonja Zanuttini
Vija Howe	Judy Mason	Barbara Peacock	Mary Smith	Geraldine & Tim Zavitz
David S.Howes	Ray Matthews	Derek Pederson	Chuck & Judy Smith	Ron Zimmerman
Bill Hughes	Francis & Mary Matthews	Laurie & Jack Peets	John & Linda Smith	Debbie Zimmerman
Roger Hughes	Anthony Mazzei	Carmen Pelletier	Nancy Smith-Merritt	Elisabeth Zimmermann
Fred & Laurie Huneault	McAsphalt Industries Ltd.	Michael Parris	Betty-Lou & Ken Souter	<i>Please see Financials for information</i>
Consulting Engineers Hydromantis, Inc.	Jean McBrain	Pete Juhlke Signs	Sparrow Family	<i>about Memorial and Deferred gifts.</i>

Summarized Financial Information

For Years Ended December 31, 2002 and 2003

Balance Sheet

	2003	2002
Assets		
Cash and cash equivalents	562,860	382,634
Investments	1,570,892	938,387
Other assets	9,204	6,311
TOTAL ASSETS	2,142,956	1,327,332
Liabilities and Fund Balances		
Liabilities		
Accounts payable and accrued liabilities	5,918	11,716
Deferred revenue	396,191	35,470
Total Liabilities	402,109	47,186
Fund Balances	1,740,847	1,280,146
TOTAL LIABILITIES AND FUND BALANCES	2,142,956	1,327,332

Statement of Revenue, Expenses and Fund Balances

Revenue	Operating Fund	Endowment Fund	2003	2002
Donations	37,469	459,239	496,708	604,551
Investment income (loss)	1,929	177,830	179,759	(27,571)
Sundry and special events	40,040		40,040	42,405
Grants and other income	39,437		39,437	67,636
TOTAL REVENUE	118,875	637,069	755,944	687,021
Expenses				
Advertising and promotion	5,588		5,588	4,991
Depreciation	1,237		1,237	694
Education services				2,909
Grants		137,691	137,691	31,442
Investment counsel fees		15,219	15,219	7,845
Office and administration	30,761		30,761	26,761
Salaries and benefits	67,116		67,116	63,803
Special events and projects	37,631		37,631	3,861
TOTAL EXPENSES	142,333	152,910	295,243	142,306
Excess of Revenue over Expenses for the Year	(23,458)	484,159	460,701	544,715
Fund Balance, Beginning of Year	95,914	1,184,232	1,280,146	735,431
Transfers				
Administrative Fee	12,138	(12,138)		
Other	(614)	614		
FUND BALANCE, END OF YEAR	83,980	1,656,867	1,740,847	1,280,146

► The summarized financial information presented here was extracted from the audited financial statements of the Niagara Community Foundation. The firm of Crawford, Smith and Swallow Chartered Accountants LLP performed the audit and issued an auditor's report on the financial statements. Complete audited financial statements, with accompanying notes, are available from the Foundation upon request.

Notes to the Financial Statements

Organization: Niagara Community Foundation was incorporated without share capital in April, 2000 as a non-profit corporation under the laws of Canada. The Foundation is a public foundation registered under the Income Tax Act (Canada) and, as such, is exempt from income taxes and able to issue donation receipts for income tax purposes. Niagara Community Foundation services the Niagara Peninsula by building permanently endowed charitable funds for the changing needs and opportunities in the community.

Significant Accounting Policies

The financial statements have, in management's opinion, been properly prepared within reasonable limits of materiality and within the framework of the accounting policies summarized below:

Fund Accounting – The operating fund reports resources available for the foundation's general operating activities including fixed assets. The endowment fund reports resources that are required to be maintained by the foundation on a permanent basis.

Investments – Investments are recorded at year-end market values.

Memorial Gifts

This year we received donations in memory in memory of Winnifred Babcock, May Ballett/Pless, Frank A. Branscombe, Helen Chippie Feldman, Marguerite Grammar, Eric E. Hojczyk, Wilma R. Kyle, Stephen Leaf, Dolores Leskiw, John Mascia, Gertrude Otonicar, Helen Pickles, Anne Rigby, Stephen Souter, Keith Sullivan, Wilhelm Uhrig and Harvey Yalonetsky.

Tribute Gifts

This year we received gifts in honour of Michael Boggs.

Deferred Gifts

By remembering the Foundation in one's estate plan donors can make 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, Norm Bradshaw, F. William Ford, Anne Kemp, June Munro, Chuck & Judy Smith, Liz Palmieri and Jessie Thompson.

REPORT DESIGN BY

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