

HURONIA
COMMUNITY
FOUNDATION



LA FONDATION
COMMUNAUTAIRE
DE LA HURONIE

ANNUAL REPORT

2010 - 2011

ELEVEN YEARS - OVER \$620,000 IN GRANTS

GIVE TODAY, HELP FOREVER

OUR VISION

To bring donors and charities together to enrich lives in Huronia.

OUR MISSION

To support and sustain Huronia forever by accepting, building and managing financial gifts, investing them for long term growth, and distributing the earnings to local charities based on their needs and the needs of our community.

Message from the President & Executive Director

It's hard to believe that our first decade is behind us. Time sure has flown!

We are launching our next decade well prepared, with a strong Board of Directors with well rounded professional skills. Our six Board appointed committees are strong and well organized with 56 volunteers who are talented and well respected in the community. These folks are ready to help propel us forward!

Asset development is the current top priority of the Foundation. We have established an Ambassadors program to train and recognize our volunteers who help spread the word in the community. We will be spending more time meeting with existing as well as prospective donors interested in the Foundation as well as meeting with Professional Advisers to better learn of their needs to assist in making more referrals to us.

Moreover, we are collaborating with Orillia, Barrie, and Bradford Community Foundations to increase awareness and understanding of community foundations in Simcoe County. Over the next 24 months, the four foundations will be developing new joint communication and marketing strategies in the areas they serve as well as using a new integrated management software program to improve external communications and build upon our databases management. The HUB project as this collaborative is known, is a result of an Ontario Trillium Foundation grant, which should help significantly increase the profile and giving to Simcoe County's community foundations. Additionally, we will be exploring opportunities to extend our reach to Wasaga Beach and Collingwood.

Hurononia Community Foundation will continue to build on our previous good work of linking over 40 family legacies (endowments) to their community. We are proud of the relationships we have built with our donors, our volunteers, of the thoughtfulness and consideration taken in the grant-making decisions and of the low costs of managing our funds and of the flexibility we provide to our donors.



Garry Morehouse



George Cornell

Thank you to all who have contributed to our success. We look forward to your continued support to make Huronia Community Foundation the vehicle of choice to connect donors to the needs of our community.

Garry Morehouse
Garry Morehouse,
Executive Director

George Cornell
George Cornell,
President



Our Mission in Action

Gift of Grace Soup Kitchen

As 'Mary' saw the group of people approach her table with a cake brightly lit with candles, she could hear their voices rising in unison, singing the birthday song. Her heart swelled and she couldn't stop the tears from sliding down her cheeks. This is the first birthday cake for the 45-year-old woman, the first time she ever heard those words directed at her.

Life is getting better now that she has found a welcoming place to go on Tuesday mornings. The volunteers at the Gift of Grace Soup Kitchen in Midland and the 40 – 75 clients who come each week have become friends. Although the food she receives nourishes her body, the camaraderie feeds her soul.



The soup kitchen is operated on a small budget but makes a huge difference to the needy people of Midland. For some, the food served on Tuesdays is the only decent meal they have all week.

Lately they have seen an increase in the number of people who need help, while donations have decreased. Without a Huronia Community Foundation grant of \$1,000 in 2011, the charitable organization would have run out of money.

YMCA Camp Kitchikewana



Swimming, canoeing, bonfires and friends – any Camp Kitchikewana alumnus will tell you that this and more is all part of the experience at the popular camp on the shores of Georgian Bay. But for one special camper who was immersed in the 'Kitchi' culture, the experience was life changing.

Although 'John' may not be developing the same as his peers, he was just as involved in the Camp Kitchikewana customs as every other child: developing friendships, exploring Beausoleil Island, and most importantly to him, overcoming his vertigo to jump the 'crazy tower'. The result was a more confident, healthier and calmer individual returning home with memories he'll cherish forever.

John's 2010 summer adventure was made possible with a grant by the Huronia Community Foundation to the YMCA Strong Kids Campaign. The \$1,140 award covered a two-week overnight camping session, including food, accommodation, programs, travel costs and staff wages.

The goal of the Strong Kids Campaign is to raise enough money so they never have to turn a child away for financial reasons. Without the generosity of community partners like the Huronia Community foundation, this would not be possible.



Message from the Grants Chair - Helmut Paddags

The Grants Committee awards money to local charities based on the criteria established by the Foundation. We were fortunate to be able to contribute to the work of many deserving organizations. Unfortunately, there were insufficient funds to help all the worthy applicants. We allocate the proceeds from the Unrestricted Funds, Field of Interest Funds and the Flow-through Funds, three of the six types of funds available at Huronia Community Foundation. Please see page 12 for the definitions of all types of funds.

Spring 2011 Grants:

- **The Huronia Museum: \$969 grant** for its travelling education program and exhibit of war medals received by men and women of Huronia.
- **Habitat for Humanity North Simcoe: \$1,500 grant** to assist with moving a house to a site in Penetanguishene.
- **YMCA of Simcoe Muskoka: \$1,140 grant** to enable two campers to enjoy a week of overnight camping at YMCA Camp Kitchikewana through the Strong Kids Campaign.
- **Catholic Family Services of Simcoe County: \$1,050 grant** to provide Critical Incident Stress Management Training.
- **Midland Community Gardens: \$1,250 grant** to create garden plots in Little Lake Park for personal and community consumption as well as education about sustainable gardening.
- **Shelter Now: \$1,250 grant** to build a therapeutic garden and healing waterfall with pond.
- **Gilda's Club Simcoe Muskoka: \$1,250 grant** to operate two cancer support one-day summer camps.
- **Junior Achievement of Central Ontario: \$1,000 grant** to provide Economics for Success programs in Huronia to help students understand the economics of life.
- **Midland Area Reading Council: \$1,100 grant** to assist with running tutor training workshops.
- **Gift of Grace Soup Kitchen - Knox Presbyterian Church: \$1,000 grant** to buy supplies to feed the hungry.
- **Quest Art School and Gallery: \$900 grant** to provide facilitators for the Brown Bag Series of educational programs.
- **Canadian Diabetes Association: \$700 grant** to install equipment for a low ropes course at Camp Huronda for diabetic children.
- **Life Skills and Independence for Teens: \$500 grant** to assist with food for youths to cook meals.
- **Eat Well to Excel: \$500 grant** to provide student nutrition programs in local schools.

Each recipient provides an evaluation of the success of their program and an impact report. A small sum of money is available to be allocated during the remainder of the year for youth oriented grants.

It has been a rewarding experience for me to work with such dedicated people on the Foundation Board, the Grants Committee and the media. We look forward to working with Barbara Jones who will assume the chair of the Grants Committee this year.



2010 - 2011 Grants

Grants totaling \$40,909 were awarded from April 1, 2010 to March 31, 2011:

Fund & Recipient	Amount
<i>Askennonia Cedar Ridge Pops Fund</i>	
Askennonia Senior Centre.....	\$500
<i>Bill Barnett Bursary Fund</i>	
MSS Scholarship Fund.....	\$300
<i>Bondar Nursing Fund</i>	
Scholarship.....	\$200
<i>Cedar Ridge Pops Fund</i>	
Boys and Girls Club of Midland.....	\$1,000
<i>Community Flow Through Fund</i>	
Atlantic Challenge.....	\$302
Beausoleil First Nations.....	\$1,053
Hurononia Foundation for the Arts.....	\$1,700
Midland Area Reading Council.....	\$160
Rotary Music in the Park.....	\$500
<i>David Finch Fund</i>	
Midland Secondary School.....	\$1,000
<i>Environment Fund</i>	
Wendat.....	\$1,000
<i>Helen Redman Fund</i>	
MSS Scholarship Fund.....	\$300
<i>Jake Just Fund</i>	
VOX Huronia.....	\$245
<i>James Bartleman Fund</i>	
Beausoleil First Nations Bursary.....	\$1,447
<i>Jim McCready Fund</i>	
Georgian Bay Land Trust.....	\$947
<i>JJ Gignac Fund</i>	
Our Best Care Campaign.....	\$1,000
<i>LabX Fund</i>	
Beausoleil First Nations Library.....	\$1,000
Catholic Family Services.....	\$1,000
Community Living Huronia.....	\$1,000
Georgian Bay Cancer Support Centre	\$1,000
Gift of Grace Soup Kitchen.....	\$1,000
Hurononia Museum Heritage Dinner.....	\$1,000
Kelly Shires Snow Run.....	\$500

Fund & Recipient	Amount
Midland Area Reading Council.....	\$3,000
Midland Public Library.....	\$300
OSPCA Domestic Shelter.....	\$200
Salvation Army.....	\$1,000
Scientists in School Program.....	\$2,000
<i>Midland Secondary School Fund</i>	
MSS Scholarship Fund.....	\$500
<i>Moss Bursary Fund</i>	
MSS Scholarship Fund.....	\$500
<i>Penetanguishene Public Library Fund</i>	
Penetanguishene Public Library.....	\$500
<i>Penetanguishene Youth Fund</i>	
Ball Hockey League - Town of Penetanguishene.....	\$1,000
Boys and Girls Club of Midland.....	\$450
<i>Professional Advisors Fund</i>	
Midland Area Reading Council.....	\$340
<i>Reach Fund</i>	
Ball Hockey League - Town of Penetanguishene.....	\$400
Georgian College.....	\$1,266
<i>Stanley Redman Fund</i>	
MSS Scholarship Fund.....	\$300
<i>Step up Awards Fund</i>	
Beausoleil First Nations - Bursary.....	\$1,000
<i>Tom & Lucille Gay Fund</i>	
Angels with backpacks.....	\$1,000
Askennonia Senior Centre.....	\$960
Atlantic Challenge.....	\$1,000
Habitat for Humanity.....	\$948
Midland Area Reading Council.....	\$1,500
Midland Domestic Assault Program.....	\$1,000
YMCA Camp.....	\$1,000
<i>Town of Penetanguishene Fund</i>	
Student Bursary.....	\$350
<i>Youth Fund</i>	
Big Brothers/Big Sisters.....	\$1,000
Boys and Girls Club of Midland.....	\$1,000
YMCA Camp.....	\$115
Total:	\$40,909



Celebrating Our Donors

The Attitude is Everything Endowment Fund

Marie and I have come to learn over the years that attitude really is everything when it comes to navigating the waters of life. A slight change in perspective can make all the difference in the world between thriving or just surviving!

Although we are both dedicated to giving back to our community through public service and volunteerism, we also heard the call of “building community” for the future through Huronia Community Foundation. We hope to use the proceeds of our fund to provide a graduation award in our local elementary schools to students that demonstrate that “attitude really is everything”

We would like to thank Huronia Community Foundation for providing the vehicle to contribute to our community in such a lasting way and we hope others will be inspired to consider their own unique ways to build our community through the Foundation.



- Stephan Kramp & Marie Godry-Kramp

Barbara Jones



After living in the Huronia area for 22 years, Barbara Jones isn't quite sure if she is considered 'a local' or not, but for her, her husband, Ian, and their two children, this community is home. It's a home that Barbara has given generously to since she married Ian and moved onto the Tay Township farm that he grew up on and still actively farms.

Barbara Jones is known throughout the community through her extensive volunteer work with organizations such as the Southern Georgian Bay Chamber of Commerce, where she is currently president, Meals on Wheels, the United Church in Vasey, and of course, the Huronia Community Foundation, where she sits as chair of the Grants Committee.

“I love that there is a place to put money that leaves a legacy long after I am not here to witness the benefits that the community receives,” says Barbara. “The Grants Committee lets me see many of the projects that are right here in Midland, Penetanguishene, Tiny and Tay. People have great ideas but often can't get them into action without money. That's where the Foundation can really make a difference.”

Barbara's philanthropic spirit truly knows no bounds as she continues to look for ways to give back to this community. After her mother-in-law passed away six years ago, and with her own mother presently not well, she and Ian have been thinking about how much these wonderful women mean to them and how much mothers mean to us all. They are in the process of creating a new endowment fund at the Huronia Community Foundation that honours mothers, one that would give people a place to put a donation that would benefit women in Huronia for years to come.



Volunteer Spotlight

Anita Dubeau



I was delighted when asked to sit on the Board in the fall of 2010. I have long admired the ‘Vision’ of the foundation: to bring donors and charities together to enrich lives in Huronia. It’s a very powerful statement and purpose.

Now having the time to commit to the foundation board, I am chairing the Ambassador Committee. An ambassador is “an agent of awareness and creator of connections”. By sharing information and spotting opportunities, an ambassador helps to promote and encourage growth of the community foundation. I look forward to this work.

My family has a long history of giving back to the community. Parents Bernard and Kay set a great example for me to follow. I first began my volunteering as a Leader and Commissioner in The Girl Guides of Canada. As a long time member of the Quota Club of Huronia, I served a term as President. I was a board member of the Community Advisory Board at the Mental Health Centre, Penetanguishene (now called Waypoint Centre for Mental Health) and served as Chair of the Building Committee for St Ann’s Parish. Currently, I sit on St. Ann’s Finance Committee. I have been a member of The Rotary Club of Penetanguishene since 2009 and will sit as a Board Director for 2011-2012. I am

also very proud to have served my community as a municipal and county politician for 19 years, with 10 years as Mayor of Penetanguishene.

Volunteering is a way for me to honour my parents’ memory and to continue to give back to my community. I am grateful for this opportunity to serve with the Huronia Community Foundation which brings donors and charities together to enrich lives in Huronia.

Joslyn Biggins



After years of living and traveling abroad, Joslyn and her family moved to Collingwood four years ago and consider it home. Joslyn is the Chair of Breaking Down Barriers Independent Living Centre in Collingwood and has volunteered with Huronia Community Foundation’s Hub project for three years.

Having worked in the state of Maine as a fundraising manager and earning her Masters in non profit management, Joslyn understands the value of community volunteerism and the importance of grassroots movements. She says, “I’ve seen a lot of disparity in the world and became attracted to the Community Foundation movement when I lived in the United States. To me it’s a terrific vehicle for communities to create their own safety net in which funding for community initiatives will remain secure forever.”

Joslyn joined the Huronia Community Foundation Board of Directors in July and will assist the board in expanding their reach into Wasaga Beach and Collingwood.



Donors

Hurononia Community Foundation sincerely thanks the following contributors for their gifts of \$50 or more this year:

Annette Brunelle Endowment Fund

- Estate of Annette Brunelle

Barber & Haskill Endowment Fund

- Barber and Haskill Limited

Butch LaFrance Memorial GBLT Endowment Fund

- Lu LaFrance

C P Stow Endowment Fund

- Penny McLaren
- Duncan McLaren

Community Endowment Fund

- Susan Robillard
- Roderic Ferguson
- Leslie Anne Kerry
- Michelle Pilon
- Tony V Hsiung

Community Flow-Through Fund

- Edward Hartley
- David J. Walker
- Edward F. Symonds

Community Living Huronia Endowment Fund

- Community Living Huronia

Duncan (James) McLaren Endowment Fund

- Duncan McLaren

Environment Endowment Fund

- Rob Thompson

Gammell Family Endowment Fund

- Jack & Jan Harvey
- Eileen Young

Geo Bay Land Trust - Huronia Endowment

- David & Michelle Mink

- Cathy Bayles

- John Catto

Gil Robillard Family Endowment Fund

- Eleanor Robillard

- Garry & Sandi Morehouse

- Robert & Rosemary Allen

Hacker Gignac Rice LLP Endowment Fund

- Hacker Gignac Rice LLP

Helen Dubeau Family Endowment Fund

- John Dubeau
- Rita Puddicomb
- Paul Dubeau
- Elizabeth Coyne-Dubeau

Jack Beauchamp Memorial Endowment Fund

- John Beauchamp
- Bill Beauchamp
- John & Joanne Coull
- Jack Courtemanche
- Wm. Dean Nicholls
- Royal Canadian Legion Br 80
- Murray & Carol Cooper
- Marie D. Leduc
- Margaret Payne
- Roderic Ferguson
- Midland Aires

Jake Just Endowment Fund

- Debbie Just

Jim McCready Endowment Fund

- Sandra McCready

JJ Gignac Memorial Endowment Fund

- Heather Gignac
- Lillian Gignac
- Mary Lou Gignac

John Arpin Music

Endowment Fund

- Larkins Family Foundation (The)

Lab X Flow-through Fund

- LabX

Lynda Zuidema Endowment Fund

- Mink Insurance Services Ltd
- Mink Insurance Staff

Medical Student Scholarship Fund

- Peter Cook

Music Festival Flow-through Fund

- Tom Hazell
- Midland Y's Men's Club
- William Burton

Operating Fund Donation

- Larry & Kate Arnold
- Ralph & Kathy Befort
- Naomi Bell
- Patricia Brunelle
- Harry & Betty Campbell
- Dr. Pam Chart
- Compu-Solve Technologies Inc.
- Arnold DeCarli
- Barbara Dodson
- Anita Dubeau
- Paul Dubeau
- Tim Dunlop
- Garfield Dunlop
- David Dupuis
- Nancy Durst
- Yvon & Anne Gagné
- John Gammell
- Joan Gregoire
- Edward Hartley
- Tom Hazell
- Healthworks
- Anne Hurd

- Doug & Marlene Jackson
- Knights of Columbus Council 1627

- LabX
- The Larkins Family Foundation

- Hudson Leavens
- Lorraine Lesperance-Jordan
- John Lister

- J. Scott Lowes
- Ken MacDonald
- Rosemary Marchand

- Philomena Marley
- Bert Mason
- Gord McKay

- Garry McPhail
- Helmut Paddags
- Michelle Pilon

- Planned Giving Counsel of Simcoe County
- Susan Robillard

- Peter & Doris Shirriff
- Andre St. Amour
- Jill St. Amant

- Bruce Stanton
- Anna Strahl
- Edward F. Symonds

- Elizabeth Valentine
- Laura Vaughan
- Kelly Weatherell

Reinhart Weber Penetanguishene Public Library Endowment Fund

- Friends of the Penetanguishene Library
- George Fontaine

Rev Cliff Pendlebury Outreach Fund

- St. Paul's United Church
- Jean Walters



***Vaughan Family
Endowment Fund***

- Laura Vaughan

***Wyevale School Endowment
Fund***

- Bonnie McDonald

Memorial and Tribute Gifts

In Honour of:

Allan James
Rob Thompson

In Memory of:

Ross Hawkins
Jules Maheu
Bernd Taeger
Mary Urquhart
Bill Black
John Hamelin
Irene Hardy
Frieda Kopeinig
Anisia Mordowanec
Willie St. Aubin

Note: Every effort has been made to ensure accuracy in this list. However, if your name has been omitted, misspelled or incorrectly placed, please accept our apologies and let us know so we can correct it.

In addition the Foundation administers donations on behalf of Physician Recruitment, the Georgian Bay Cancer Support Centre, PAK (Players Assisting Kids) and Beausoleil First Nations "Step Up" Award.

YOUR DONATION TODAY WILL BE YOUR GIFT FOR TOMORROW

YES, I WOULD LIKE TO DONATE.

Name

Address

Address

City

Postal Code

Telephone

Fax

Email

Please accept my donation of \$ _____ to the
_____ Fund to be held in perpetuity.

Cheque Enclosed VISA MasterCard

Card No.

Expiry

Signature

Give Today, Help Forever

info@huroniacommunityfoundation.com

www.huroniacommunityfoundation.com

705.527.5554

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Charity Registration No. 890875727 RR0001

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Volunteers

2010-11 Board of Directors

George Cornell, President
Laura Vaughan, Vice President
Blair Stotesbury, Treasurer
Garry McPhail, Secretary
Allan Arlett
Joslyn Biggins
Ron Crane
Keith Donaldson
Anita Dubeau
Dwayne Frans
Doug Jackson
Ellie Kirby

Staff

Garry Morehouse, Executive Director
Betty Valentine, Financial Officer

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John Gignac, Vice President
Kathy Elsdon-Befort
John Gammell, President
Ed Hartley
Joe Jurmain
Dunc McLaren, Secretary/Treasurer
Randy Robbins
Gil Robillard

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Brad Saunders
David Walker
Dr. Lynda Mickleborough
Dr. Pam Chart
John Griffiths
Owen Quilty, Treasurer
Phil Marley, Treasurer
Susan Robillard

Ted Symons, Secretary

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Barbara Jones
Dr. Lynda Mickleborough
Ellie Kirby
Fr. John Vella
Garry Morehouse
Jill St Amant
John Gammell
Kathy Elsdon-Befort
Michelle Pilon
Rosemary Marchand
Yvonne Wismer

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Dave Mink
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Susan Robillard
Steve Whittington

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Cathy Bayles
Doug Jackson
Patrick Kearns
Dunc McLaren
Jill St Amant
Blair Stotesbury

2011 Circle of Honour Philanthropic Awards

Anita Dubeau
Betty Valentine
Bonnie McDonald
Cathy Bayles
David Mink
Denise Hayes
Dianne Paddags
Dwayne Frans
Ellie Kirby
Fr John Vella
Garry McPhail
Garry Morehouse
George Cornell, M.C.
Helmut Paddags
Jack McFadden
Jackie McLaughlin-Welch
Keith Donaldson, Chair
Laurene Hilderley, Nominations

Marlene Jackson
Mary Brown, Communications
Michelle Armstrong
Nicole French
Rosemary Marchand, Selection
Sheila Storey
Susan MacDonald
Susan Robillard, Logistics
Suzanne McDonald
Suzanne Roy

Special Projects

Jane Barnett, E-News
Nicole French, Website
Donna Lister, IMS Accounting
Helmut Paddags, Photos
Gord Sedgwick, IMS Accounting
Betty Valentine, IMS Accounting
Jason Wilson, Website

HUB Steering Committee

Joslyn Biggins, Chair
George Cornell
Kim Goggins, Staff
Garry Morehouse
Plus reps from Orillia, Barrie and Bradford CFs



2011 Circle of Honour Philanthropy Awards Dinner

The Huronia Community Foundation Circle of Honour Philanthropic Awards provide the opportunity to recognize individuals of all ages, businesses and organizations that have contributed financially toward the improvement of the quality of daily life in Huronia.

Cathy Bayles received the 2011 Circle of Honour Individual Award from Garry McPhail.



Jim Elliott of the Elmvale & District Lions Club received the 2011 Circle of Honour Group Award from Anita Dubeau.



Mark Vaughan of Atlas Block received the 2011 Circle of Honour Business Award from Doug Jackson.



Representatives of the Midland YMCA Youth Leadership Program received the 2011 Circle of Honour Youth Award from Ron Crane.



Sponsors & Partners

- Scotiabank
- Birch Hill equity partners
- Home Cooked Website Solutions Inc.
- RBC Dominion Securities - Catharine Bayles
- TD
- Anonymous
- Atlas Block Co. Limited
- Clara's Creations
- Hacker Gignac Rice LLP
- Hazell Underwriting Group
- Midland TIM-BR Mart
- Mink Insurance Services Ltd.
- SCHOTT Gemtron (Canada) Corporation
- the co-operators - Barbara Jones
- Blair Stotesbury, CFP CGA
- Bourgeois Midland Ford
- Bruce Stanton, M.P. Simcoe North
- Canadian Tire Midland
- S. Charlebois Haulage and Excavating Ltd.
- General Mills
- Georgian Queen Boat Cruises
- James Whittier, CA
- Leclair Cremation Centre
- Midland Printers
- Parkbridge Lifestyle Communities Inc.
- Claustro
- Brooklea Golf & Country Club
- Full Line Electronicss
- Midland Golf and Country Club
- Phil's Catering
- Skyline Investments Development Inc.
- Shop Midland.com
- The Doc 104.1FM
- The Free Press
- Vague FM 88.1
- Askennonia Seniors Centre
- Community Link North Simcoe
- Community Living Huronia
- Georgian Bay General Hospital
- Shelter Now
- Southern Georgian Bay Chamber of Commerce
- Waypoint Centre for Mental Health Care
- Wye Marsh



Funds

UNRESTRICTED COMMUNITY

Endowment Funds

Annette Brunelle
Penetanguishene Student*
Community In-Memoriam
Leah P. Gignac Penetanguishene
Community
Professional Advisors
Tom and Lucille Gay

DONOR ADVISED

Endowment Funds

Barber & Haskill Fund
Cedar Ridge Pops Festival
Cliff Pendlebury Outreach
Duncan (James) McLaren *
Hacker Gignac Rice LLP
Jack Beauchamp Memorial
Jake Just Memorial
Jim McCready Memorial
JJ Gignac Memorial
Len Self Youth Memorial

Midland in Motion (MiM)
PAK (Players Assisting Kids)
Penetanguishene Youth
REACH
Town of Penetanguishene
Community
Vaughan Family
Wyevale Scholastic

DONOR DESIGNATED Endowment Funds

Administration
Askennonnia Seniors
Butch LaFrance Memorial
Georgian Bay Land Trust*
C P Stow Memorial
CLH (Community Living
Huronian) *
Gammell Family
Georgian Bay Land Trust
Huronian Stewardship*
Gil Robillard Family
Helen Redman Bursary
Iris Catherine Stotesbury

Memorial
James Bartleman Bursary
Lynda Zuidema
MSS 100th Anniversary
MSS Bill Barnett Bursary
MSS Jas Roberts Bursary
MSS Moss Bursary
Penetanguishene Library
Stanley Redman Bursary

FIELD OF INTEREST *Endowment Funds*

Bondar Nursing Bursary
David/Delva Finch Youth
Environment
John Arpin Music
Youth

MANAGED FUNDS

Admin Reserve Fund
Huronian Museum Heritage
Medical Student Scholarship
Rosewood Shelter

FLOW THROUGH

Georgian Bay Cancer Support
Centre*
Huronian Community
LabX
Physician Recruitment
Step Up Awards Program
First Nations

DEFERRED GIFTS

Life Insurance

The Foundation is owner and beneficiary of Life Insurance Policies for three individuals totaling \$145,000.

Bequests

The Foundation will be the beneficiary of bequests by Garry Morehouse and Tom Hazell.

** New Funds established in 2010-11*

Fund Definitions

Community Unrestricted Endowment Funds This is a general Fund that gives the Foundation the greatest flexibility in awarding Grants to charities. This type of Fund is not tied into any specific charity or area of interest, allowing the Foundation to respond to the immediate and changing needs of the community.

Donor Advised Endowment Funds

This fund enables donors to have ongoing participation in the selection of charities that will benefit from their gift.

Designated Endowment Funds

This type of Fund gives the donor the opportunity to specify, at the time the Fund is established, which particular charity or charities they would like to support in perpetuity.

Field of Interest Endowment Funds

Donors identify an area of interest that they would like their donation to support. Examples include the arts, environment, health, seniors, children, youth, recreation, relief of poverty, or education.

Managed Funds

Managed Funds are held on behalf of a charity or charitable group with the annual returns periodically distributed back to the group.

Flow-Through Funds

The capital and income from these Funds are distributed over a one year period.



Making A Difference Now and Forever

Funds Inspired by Penny & Dunc McLaren

The McLaren's are two selfless people who have had a profound impact on Huronia Community Foundation and the community at large.

Some time ago, Penny McLaren established the Len Self Youth Challenge in memory of her dad, the Reverend Len Self. "Dad taught us well," says Penny. "Life is measured by our good deeds. It is in the giving that we receive and the gifts we give today will leave positive footprints in our communities." In order to better manage the trust, the trustees of the Len Self Youth Challenge incorporated in the spring of 2000 to become the 99th 'community foundation' in Canada – the Huronia Community Foundation. The original fund, now called the Len Self Youth Endowment Fund, creates grants for youth in the community, a passion of the Reverend Len.

Huronia Community Foundation helps donors build funds to make the difference they want to make in the community – to give back in a way that has meaning to them. For instance, Dunc and Penny helped establish a second fund - the Bondar Nursing Endowment Fund. The aim is to provide financial assistance to students entering the nursing field. Grants have been made to students at the local schools.

Undaunted, Dunc McLaren set up "Ticker" (Christopher) Stow Endowment Fund in memory of his stepfather. "Ticker" was a long-time supporter of the local Alzheimer's Association, the Salvation Army, Red Cross, Penetanguishene Public Library and Severn Sound Environmental Association. With this fund, Dunc has assured that these organizations will continue to benefit from the late "Ticker's" annual donations. What a great way to remember and acknowledge a loved one!

The dynamic duo established a fourth Endowment Fund. The Duncan James McLaren Fund, a dual purpose fund, will use its earnings to help cover the foundation's administrative costs and to further its charitable purposes.



Dunc and Penny see the Foundation as the perfect vehicle for donors to keep both large and small donations coming back to the community. "We like how a fund can be tailored to suit you and how it can be managed for or by you. The foundation provides good returns for both building the principal and granting. You can be involved as much as you wish in determining the grants" notes Dunc.

There are no stronger supporters of Huronia Community Foundation than Dunc and Penny and on behalf of the community, we thank you.



Financial Highlights

(000's)	2011	2010	2009
Total Assets	\$1, 806	\$1, 524	\$1,289
Investment Returns (Gross of Fees)			
One Year	11.1%	19.5%	-18.1%
Ten Years	5.2%	5.4%	4.2%
Net Assets Under Management			
Endowments	\$1,218	\$1,055	\$963
Managed	\$101	\$89	\$75
Flow-Through	\$131	\$131	\$145
Fund Balances			
Restricted for Endowment Purposes	\$1,218	\$1,055	\$963
Unrestricted (Accumulated Operating Surplus)	\$61	\$70	\$53
Donations Received	\$168	\$100	\$125
Flow-Through Donations	\$153	\$187	\$179
Grants Awarded	\$41	\$45	\$60
Operating Fund			
Revenues	\$66	\$91	\$85
Expenses	\$75	\$74	\$77
Excess (Deficit)	(\$9)	\$17	\$7
Expenses as % of Assets	4.1%	\$4.8%	\$6.6%
Number of Endowment Funds	55	51	47

The financial statements of Huronia Community Foundation were audited by the firm of Tony V. Hsiung, Chartered Accountant. The complete audited financial statements, with accompanying notes, are available from the Foundation on the Foundation's website. The figures for the above financial highlight are consistent with that of the audited financial statements

Endowment donations are held in perpetuity and the earnings are used to support the changing needs and opportunities of the community. Managed Fund contributions such as for the Medical Student Scholarship program are not held in perpetuity but are invested over time. Flow-Through contributions are distributed over a one-year period.

The Foundation administers flow through donations on behalf of Physician Recruitment, the Georgian Bay Cancer Support Centre, PAK (Players Assisting Kids) and Beausoleil First Nations "Step Up" Award.



The Benefits of Giving

Tax Benefits of Giving

Here are some scenarios to help you understand the tax benefits of giving to charity.

- 1) The potential tax savings for donations in excess of \$200 in any one year: with a donation of \$10,000 you will potentially receive federal & provincial credits of \$4,640 for a total tax savings of 46.4% (as a % of the gift.)
- 2) Rather than pay taxes on your RRSP and RRIF income, donate this income to charity for a tax benefit.
- 3) Donating publicly traded stocks, bonds, mutual funds or other securities is a tax-smart way to give. Electronically transfer your securities from your brokerage account to the charity brokerage account and receive a tax receipt for the full appreciated value - similar to when you donate cash gifts. As of May 2, 2006, you will not be subject to any capital gains tax, making donating securities the most tax-effective way to make your donation.
- 4) Don't make the CRA your prime beneficiary! Once you have considered the needs of your family and loved ones, consider including a charitable bequest in your Will to ensure that your

final wishes are fulfilled and to help keep that taxman at bay. If your estate includes stock with capital gains, this tax will be triggered. You can reduce the estate taxes by donating some of the stock to charity through your Will. When you make a bequest to Huronia Community Foundation, your personal legacy of giving is created when we establish a special fund that benefits the community forever. A gift of insurance can work in much the same way. Donating an insurance policy to the charity can provide tax relief to the estate.

By carefully planning your bequest, you can reduce or eliminate the taxes payable on your estate. Your estate can claim gifts in the year of death equal to 100 per cent of your net income in that year and the preceding year. And, you will have the satisfaction of knowing that your bequest will be helping your community forever.

We recommend you consult your Professional Advisor for the best approach for you. We would be pleased to recommend a professional advisor at your request.

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