



Community Report

“Resilience is the capacity to thrive in a changing context.” *Sherri Torjman*

A changing context certainly describes this past year. The ambiguity that still surrounds us as we move into 2009 defies our tendencies to seek stability, certainty and resolution. As the new year unfolds, nothing seems resolved. The markets are still uncertain, unemployment is rising, the need for assistance programs increasing, and the charitable sector is faced with the ever-increasing challenge of doing more with less. If there ever was a time when resilience was required it's now.

In her 2006 discussion paper, *Shared Space: The Communities Agenda*, author and social policy analyst Sherri Torjman sets out a framework for promoting strong and vibrant communities. She concludes that while there is no single best approach to making communities great places, resilience is the essential attribute of every healthy community. A resilient community, she argues, implies a state of wellness characterized by the ability to survive, adapt, and thrive.

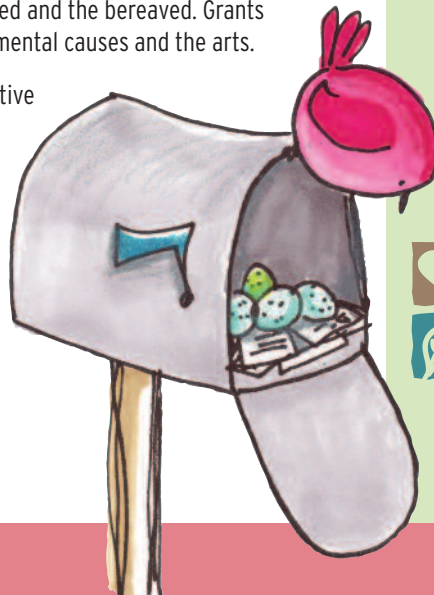
When we began our 2007-08 year the economy was strong. Although we eventually recognized the predictors of a downturn, investments in Stratford and Perth County through the Foundation remained strong. Donors continued to invest in projects, causes, and organizations which enhanced community vitality. In all, five new funds were created:

Sid and Margaret Henry Fund | Mansbridge Environment Fund | Judi Hemmingway Memorial Fund | Orr Family Fund | Meulensteen Tire Environment Fund

We also saw the impact of investments made in previous years. In January, grants totalling more than \$27,000 were awarded to 14 community organizations representing all areas of Perth County. These grants funded projects which helped children, seniors, youth, the visually impaired and the bereaved. Grants were also awarded to projects supporting environmental causes and the arts.

Another rewarding part of 2007-08 was our innovative partnerships with other sectors. We joined forces with the Benjamin Moore Company, facilitated by Community Foundations of Canada, to provide paint and funding to five area organizations for restoration projects. We also initiated a corporate sponsorship program and invited area businesses to partner with us to build strong communities in Perth County.

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Community Foundations promote resilience to build strong and vital communities in three unique ways. Community Foundations...

BRING DONORS TO THE TABLE AS COMMUNITY BUILDERS

We help them formulate and realize their philanthropic goals, matching their interests and concerns with community needs and organizations. We help them find innovative and responsible ways to give their investments lasting impact.

TAKE THE BROADEST VIEW OF WHAT A COMMUNITY IS AND WHAT IT NEEDS TO SUCCEED

That's why our grants support everything from shelter, sustenance and care for those most in need, to recreation, the arts, and the environment.

TAKE THE LONG-TERM VIEW FOR OUR COMMUNITIES

We identify long-term needs and opportunities and invest in sustainable solutions, helping our communities become resilient, resourceful, and ready for the future they want.





continued from front...

We continued to work with the City of Stratford and donors to the Rotary Complex to facilitate gifts of securities to that community project. And the City of Stratford remained committed to the Foundation through its annual grant to us. We also embarked on a new partnership with the provincial government through the Ontario Trillium Foundation to raise awareness of the Foundation's work and strengthen relationships within and between sectors.

Community foundations are well-equipped to respond to the challenges

facing their communities. Since 1921, when the first Canadian foundation was launched in Winnipeg, contributing to community resilience and vitality has been the purpose, promise and passion.

The Stratford and Perth County Community Foundation is continuing this legacy here in Perth County by connecting donors with community needs and opportunities and helping them to invest in building strong and resilient places to live, work and play.

Tim MacDonald
Chair, Board of Directors

Elizabeth Hachborn
Executive Director

Picture: Perth-Wellington MPP John Wilkinson (left) presenting Trillium Foundation grant to Elizabeth Hachborn and Tim MacDonald.

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Gail Willson, Stratford

STAFF

Elizabeth Hachborn, Executive Director

Ten reasons people choose to give through the Community Foundation

1. We are a local organization with deep roots in the community.
2. Our staff and volunteers have broad expertise regarding community issues and needs.
3. We provide highly personalized service tailored to each individual's charitable and financial interests.
4. Our funds help people invest in the causes they care about most.
5. We accept a wide variety of assets and can facilitate even the most complex forms of giving.
6. We partner with professional advisors to create highly effective approaches to charitable giving.
7. We offer maximum tax advantage under federal law for most gifts.
8. We multiply the impact of gift dollars by pooling them with other gifts and grants.
9. We build endowment funds that benefit the community forever and help create personal legacies.
10. We build community vitality, fostering collaboration on issues of broad interest to create positive change.



NEW COMMUNITY INVESTMENTS

Sid and Margaret Henry Fund

Initiated by siblings Jim Henry (Stratford), David Henry (Ottawa), Don Henry (Listowel) and Jane Morley (Waterloo) this fund was the result of the Henry family's vision of how best to honour the memory of their parents, Sid and Margaret Henry. Sid and Margaret, active and long time residents of Listowel, were dedicated to volunteering and giving to the community. The annual beneficiary of income from the fund is the North Perth Community Hospice. Because of the Henry family's belief in the value of education, the fund income will be applied specifically to the costs of educating Hospice staff and volunteers, and for community education workshops. "We're very grateful to the Henrys for initiating this fund in support of the Hospice," said Hospice board chair Sara Trainor. "It's a wonderful way to keep the memory of Sid and Margaret and their acts of caring alive in the community."

(Pictured from left: Don, Jane, David, Mary - Don's wife, and Jim.)



Mansbridge Environment Fund

"Our family believes in returning something to the community that has been so good to us," said Peter Mansbridge and Cynthia Dale *(pictured)* on initiating the Mansbridge Environment Fund. "Stratford and Perth County are beautiful, an area that people the world over love to visit. Hopefully the Fund in its small way will help worthy environmental projects keep it that way."

The Stratford and Perth County Community Foundation is pleased to have one of the most trusted faces in Canadian news and two well-respected Canadians invest in environmental causes in Perth

County. As well as serving the intended purpose of giving back to the community, the Mansbridge Environment Fund will also 'give forward' as future generations will benefit from the positive environmental changes that will result. Grants from the Mansbridge Environment Fund will support a variety of environmental organizations and causes.

Judi Hemmingway Memorial Fund

Family and friends of the late Judi Hemmingway *(pictured)* joined together to create a fund they are sure would have pleased Judi. A life-long advocate on behalf of women and the issues they face, Judi worked on the front lines and behind the scenes to advance the wellbeing of women in the community. Judi passed away in February 2006 on her birthday at the age of 54 as a result of complications following surgery.

Judi approached life with a quick wit and twinkle in her eye, qualities which served her well in living her passion of helping others, whether in her personal or work life. She was employed in the charitable sector for fifteen years first at



S.A.A.I.L. (now ShelterLink Stratford-Perth) and then at Optimism Place. "Judi was a great social activist, especially around women's issues," said Anne McConnell, Executive Director of Optimism Place. "And she had a deep concern for children...she always rooted for the under dog!" Grants from the Judi Hemmingway Memorial Fund will support a variety of organizations and projects in Perth County that work to improve the lives of women and children.

Orr Family Fund

In recognition of the generations of Orr family members who contributed hard work and foresight in making Stratford the vibrant community it is today, brothers Jeff and Rick Orr initiated the Orr Family Fund. "I guess it's in our blood," said Jeff Orr. "Our great-grandfather, R. Thomas Orr, the first Orr to be born in Stratford, started what has become a family culture of volunteering and giving back. Our parents have reinforced the importance of service to the community." In the late 1800s and early to mid 1900s R. Thomas Orr was instrumental in many activities that resulted in the creation of Stratford's parks system and the Parks Board. Equal to this concern was his interest in the area's

civic and economic development. "While we want to honour the past and continue the legacy of giving back we also want to begin a new tradition of giving forward," said Rick Orr. "By setting up this permanent endowment we are making an investment in Stratford and contributing to a strong and vibrant city in which to live, work and play." Grants from the Fund

will support a variety of organizations and projects that contribute to the betterment of the City of Stratford. *(Pictured from left: Jeff, Tom and Rick Orr)*



Meulensteen Environment Fund

Brothers Steve and Dave Meulensteen *(pictured)*, owners of Meulensteen Tire and Auto in Listowel are serious environmentalists.

This past summer they celebrated the success of North Perth Green Day, a community event they initiated. One of the event's outcomes was the creation of the Meulensteen Environment Fund.

"Not many people realize this, but our business is an environmentally oriented business," said Dave Meulensteen. "We promote safe, clean and emissions reducing services, we recycle tires, oil, filters and steel, we operate our facility using as little electricity as possible - all to reduce our carbon footprint as much as possible." The brothers believe that supporting environmental causes is a wise choice - something they can do for future generations. "Our goal is not only to have an impact on the environment now through The Meulensteen Environment Fund but to create a means to support the environment in an ongoing way, something our children can hopefully carry on," said Steve Meulensteen. Grants from the Fund will support environmental projects in North Perth.



An Innovative Partnership



Pictured with grant recipients and Foundation representatives, in front of newly painted Gallery Stratford, are Bob Sbrubsall, local Benjamin Moore dealer; Vincenza Travale, Community Foundations Canada Board Chair (third from right); Doug Funston, Benjamin Moore Central Region (second from right); and Jamie Hahn, Mayor of St. Marys (far right).

Since 1998 Benjamin Moore and Community Foundations of Canada have partnered in an innovative way to help provide community groups with funds, materials and expertise to refurbish buildings and facilities of historical and human interest. In the fall of 2007 the Benjamin Moore Community Restoration Program awarded five grants to projects in Perth County assisted by the Stratford and Perth County Community Foundation. Recipient organizations were Gallery Stratford, St. Marys Museum, Perth County Historical Foundation (Fryfogel's Inn), Stratford-Perth YMCA Youth Centre and Knollcrest Lodge.

Protecting Our Environment Together (POET)

In the 2007-08 year the Foundation's focus was on the environment. Two new community investments were initiated to help the environment: The Mansbridge Environment Fund and the Meulensteen Environment Fund. The Foundation's environment program is outlined in our brochure, shown here, also a project of our 2007-08 year.



Community Funds

Unrestricted Funds

These discretionary funds provide donors with the greatest amount of flexibility for their contribution. This type of fund is not tied to any specific charity or area of interest, allowing the Foundation to respond to changing needs in the community.

Community Fund	\$253,650
Founders' Fund	6,100
Ideal Supply Community Fund	90,100

Field of Interest Funds

These funds allow the donor to designate a specific area of interest (education, children, arts) in which charitable grants will be made. Field of Interest Funds ensure that the donor's interests and values are supported now and in the future.

Foundation's Operating Endowment	13,150
George & Edna Hislop Family Fund	7,189
IPM 2005 Fund	75,000
John & Colleen MacDonald Family Fund	15,000
Mansbridge Environment Fund	10,700
McCully Centre for Rural Learning Fund	500
Meulensteen Environment Fund	1,300
Reading Fund	5,030

Donor-Advised Funds

These funds provide donors with the opportunity to be actively involved in recommending grant recipient organization or programs.

Judi Hemmingway Memorial Fund	10,000
Donald McTavish Conservation Fund	101,032
Mathieson Family Fund	5,500
Orr Family Fund	10,000

Designated Funds

These funds are established to benefit a specific charitable organization or organizations named by the donor. The earnings from these funds are distributed to the designated organization on an annual basis.

Sid and Margaret Henry Fund	6,349
North Perth Public Library Fund	9,542
Timothy Findley Fund	4,279



Community Grants

FROM THE COMMUNITY FUND - \$14,470

A grant to **Anne Hathaway Public School** of \$500 supported the school's program for developmentally delayed students by providing funds to develop life competencies. This was done through visits to the swimming pool for recreation, physical activity, sensory opportunities and the development of social and water safety skills. Photo by Scott Wishart/The Beacon Herald



The **Galbraith Optimist Camp for Kids** received partial funding from this fund (\$1,470) to provide an Environment Counsellor for their summer day camp. Staff members and campers received training in ecological systems and activities that promote environmental awareness and conservation. (Additional funding from the IPM 2005 Fund.)

Mitchell and Area Community Outreach was awarded \$1,500 to fund "Making Memories" a project to help seniors – their families, caregivers, and health professionals – deal with memory loss and end-of-life issues. The project brought together seniors with trained volunteers who through conversations created a life story album.



Funding to the **North Perth Community Hospice** helped launch their "Bears and Kits for Kids" project. A grant of \$3,000 provided funds to purchase items for the kits including bears, books, crafts, music CDs. The kits will help children in the community deal with the bereavement process and the life-threatening illness of a parent, relative or friend.

The **North Perth Public Library** received a grant of \$1,000 to purchase a subscription to Visunet Canada. The project is a partnership with CNIB and allows the library to borrow DAISY books, Braille books, and descriptive VHS and DVD movies for patrons with print disabilities.

A grant to the **Stratford Civic Orchestra** in the amount of \$4000 was awarded to fund an educational concert of Peter and the Wolf for children in grades 4-6. During the concert, the young audience was introduced to the orchestra's instruments and heard the sound each makes.



A grant of \$3000 helped to fund the **HERO Project** (Helping Everyone Respect Others) a multimedia, interactive high energy assembly program for elementary schools. The project assisted students by reinforcing good character traits, identified by Avon Maitland School Board, through stories, skits, music and video.

FROM THE FOUNDERS' FUND - \$500

Funding to **Epilepsy Huron Perth** helped the agency raise awareness of their programs, services and the resources available to residents of the community. A grant of \$500 was awarded to fund a professionally designed and printed marketing brochure.

FROM THE IDEAL SUPPLY COMMUNITY FUND - \$4,500

A grant of \$1,500 was awarded to the **North Perth Arts and Culture Council** to fund the Kids Summer Art Camp '08. The art workshops, including visual and performing arts under the direction of professional artists, involved children and youth 7-14 years of age.



Friends of the St. Marys Museum received a grant of \$3,000 to digitize the photographic collection of the St. Marys Museum. This project, involving a partnership with Knowledge Ontario, will allow the museum's collection to be accessible 24 hours a day through the Knowledge Ontario's website.

FROM THE IPM 2005 FUND - \$2,630

The **Galbraith Optimist Camp for Kids** received partial funding from this fund (\$630) for an Environmental Counsellor (see above for more details).

A grant to **Stratford-Perth Museum** of \$2,000 funded "Weather Wise" an educational program for grade 3-6 students in Perth County. Aligned with the provincial curriculum students learned about weather basics, climate change, groundwater and the water cycle.

FROM THE DONALD MCTAVISH CONSERVATION FUND - \$4,400

A grant of \$1000 was awarded to the **Rotary Club of Stratford** for a project involving a partnership with the Upper Thames River Conservation Authority. The project involved the creation of an interpretive trail for Ellice Swamp, a wetland area in Perth East.



The **Shakespeare Optimists** in partnership with the Upper Thames River Conservation Authority received a grant of \$2000 for the second phase of the Shakespeare Conservation Area Trail Enhancement Project. The project extended an existing boardwalk keeping walkers on the trail lessening the environmental impact on surrounding vegetation.

Funding of \$1,400 to the **Upper Thames River Conservation Authority** allowed two conservation projects to take place in Perth South. One project involved block tree planting and the other flood plain retirement, both along the Avon River.



**Stratford and Perth County Community Foundation
Summarized Financial Statements**

**Statement of Operations
For the year ended August 31, 2008**

Balance Sheet As at August 31, 2008		
	2008	2007
Assets		
Cash	\$ 38,089	\$ 4,495
Accounts receivable	3,627	500
GST recoverable	438	366
Prepaid expenses	2,711	855
Investments	611,776	643,046
	<u>\$ 656,641</u>	<u>\$ 649,262</u>
Liabilities		
Accounts payable	\$ 4,401	\$ 4,506
Grants payable	12,100	11,450
	<u>16,501</u>	<u>15,956</u>
Fund Balances		
Operating fund	29,594	47,662
Endowment fund	596,699	556,485
Funds for distribution	13,847	29,159
	<u>640,140</u>	<u>633,306</u>
	<u>\$ 656,641</u>	<u>\$ 649,262</u>

Statement of Operations For the year ended August 31, 2008		
Revenue		
Donations	\$ 129,089	\$ 101,289
Corporate sponsorships	12,300	1,000
County and Municipality grants	10,000	5,000
Ontario Trillium Foundation	-	11,000
Investment income	26,345	19,918
Unrealized gains and losses	(41,568)	13,514
	<u>136,166</u>	<u>151,721</u>
Expenditures		
	<u>103,905</u>	<u>80,655</u>
	<u>32,261</u>	<u>71,066</u>
Grants and Distributions		
Arts and culture	5,500	2,000
Health	500	3,000
Education and literacy	1,827	4,500
Environment	8,500	3,000
Social welfare	1,000	5,950
Heritage preservation	3,000	700
Seniors	1,500	-
Children and youth	3,600	3,000
	<u>25,427</u>	<u>22,150</u>
Excess of revenue over expenditures for the year	<u>\$ 6,834</u>	<u>\$ 48,916</u>

This summarized financial information is extracted from the audited financial statements of Stratford and Perth County Community Foundation and, not containing all of the information contained therein, is therefore incomplete. The financial statements, audited by Deanne L. Metzloff, Chartered Accountant, Professional Corporation are available upon request by contacting us by email info@spccf.ca or phone 519-271-1503.

Thank you to all our Donors!

Accumulated donations to August 31, 2008

Over \$100,000

Estate of B.J. (Bo) Sibold
Ideal Supply Company Ltd.

\$50,000-\$99,999

International Plowing Match 2005
Ontario Trillium Foundation

\$25,000-\$49,999

The Bickell Foundation
Alec & Mary "Sam" McTavish
Lillian McTavish
City of Stratford

\$10,000-\$24,999

Elizabeth Hachborn
McConnell Foundation
John & Colleen MacDonald
Don McDougall
Bob & Mary McTavish
Orr Insurance
County of Perth

\$5,000-\$9,999

Culliton Brothers
Glen & Ruth Hebel
Tim & Alexandra MacDonald
Peter Mansbridge & Cynthia Dale
Stuart & Susan McTavish
Tom & Laura Tanner

\$1,000-\$4,999

Arden Park Hotel
Bank of Montreal
Dr. Harry Brightwell
Brown ClimateCare
Dale Carnegie

Cavalier Equestrian
Roger Cotton & Marcia Matsui
David Henry
Don & Mary Henry
James Henry
Hyde Construction Limited
Jim & Laurel Laughton
Bob & Patricia Lightfoot
John & Norma MacDonald
Jane Morley
Meulensteen Tire and Auto
Mornington Communications
Friends of North Perth Library
Dr. Dennis & Laurie Nuhn
Berny Nymeyer
Jane Proudlove
Lorne & Sarah Proudlove
RBC Foundation
Peter & Michelle Sibold
Town of St. Marys
Annabell Thomson
UAP Inc.
Peter & Mary Jo Van Drunen
Paul & Joan Waechter
Anne Walsh
William Whitehead

\$100-\$499

Abbott Laboratories Employees
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James & Wendy Anderson
Dr. Glenn & Susan Armstrong
Nikolaos & Virginia Arouzidis
Ted Blowes
Scott Brookshaw
Marc Devlin
Charles Dunphy
Eric Eberhardt
The Gentle Rain
Susan Greer
Johnathon & Gregory MacDonald
Manulife Financial
Dan & Carolyn Mathieson
Paul & Colleen Mathieson
Michael & Ernestine McKenna
Scotia Bank Intek Staff
Kirk & Lori Speiran
Stratford Public Library Board
TigerTel Communications
Touch of Dutch
Steve Van den Hengel
Pauline Yang

\$500-\$999

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Tom and Heather Clifford
Community Foundations of Canada
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Norman & Catherine MacLennan
Maxims Limited Partnership
Bert (deceased) & Helen Merrill
Brenda Mitchell
Eric Proudlove
Scotia Bank

Richard & Jean Smelski
Bill Somerville (deceased)
Rheo and Sally Thompson
Tim & Madeline Woodhead

Under \$100

139 contributions

Gifts-in-Kind

Blowes Office Supplies
Country Computer Store Inc.
Festival Furniture
Shawna Gigacz/Just Spiffy
Ideal Supply Company Ltd.

Tim MacDonald
Rambri Manangement
Sun Signs
Anne Marie Tymec/Mountain Mitchell LLP
Juli Waller/Grrraphics
Zellers, Stratford

MEMORIAL GIFTS

During this year gifts were received in memory of the following :

Veronica Marcelissen Barton
Rev. Hugh Burtch
Bessie Coulthard
Carol Francis
John Hyde
Jim Kelly
John Killer
Ruth Kropf
Murray Lane
John Mathieson
Ethel McArdle
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Gerald Pafford
Margaret Richardson
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Ivan Walden
Percy Way
Len Young



Thank you to our Corporate Sponsors

Platinum

annual support of \$4,000



Silver

annual support of \$2,000



Bronze

annual support of \$1,000

