

# 60 years

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**2014 ANNUAL REPORT**

**HAMILTON  
COMMUNITY  
FOUNDATION**

History made, future intended.

## 2014 Financial Highlights

Record granting and community leadership spending at \$6.4 million  
• A 60-year total of more than \$81 million

Total assets: \$155.8 million  
• Highest ever and an increase of 14 percent over last year

Impact investing commitment of \$42 million  
• Includes \$5 million available specifically for investments and loans to Hamilton charities, non-profits and social enterprises

## *Our Vision*

**A vibrant, inclusive Hamilton**

## *Our Mission*

**To drive positive change by connecting people, ideas and resources**

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Terry Cooke  
President & CEO

Paul Gibel  
Board Chair

## MESSAGE FROM

# *the Board Chair and President & CEO*

On this 60<sup>th</sup> anniversary of Hamilton Community Foundation, we are pleased to report a banner year, with approved grants of \$6.3 million, donations of \$6.6 million, record assets of \$155.8 million, and a host of community leadership initiatives that support our mission to drive positive change.

While we are thrilled with this year's results, we never forget, especially in this celebratory year, that they reflect the sum of the work of successive generations over six decades: donors who put their trust in the Foundation, boards whose foresight enabled us to weather economic storms, and community partners who carried out the front line work with innovation and compassion. Our new tagline "History made, future intended" pays tribute to this collective legacy and

invites others to join us in shaping the Hamilton we want for citizens today and tomorrow.

We thank retiring board members Dr. Jane Aronson, Dr. Patrick Deane, Matthew Green, Ruth Liebersbach and Dr. Gary Warner for their many contributions especially to shaping our vision of a vibrant, inclusive Hamilton. We are pleased that Gary continues as our 60<sup>th</sup> anniversary ambassador along with long-time volunteer Terry Yates. We also thank Pioneer Energy LP for their generosity as the signature sponsor for our 60<sup>th</sup> anniversary celebrations.

As you read through this annual report and the stories of what's happening and what's ahead, we hope you are inspired and confident that the best is yet to come.



# *In 1954 we invested in Hamilton*

The seeds of today's Hamilton Community Foundation were sown in 1954 by a small group of people who created it based on a model they had seen in Winnipeg - Canada's first community foundation. They saw it as a new way to give back to the city they loved.

One of the founding board members in 1954 was James V. Young, whose leadership launched three generations of support for Hamilton through HCF. James' son Bill and his wife Joyce made a landmark gift to HCF in 2000. One of the largest charitable donations in Canada at the time, it transformed the Foundation's granting, leadership and ability to meet Hamilton's greatest needs.

Today, James' grandson Bill Young Jr. continues to encourage and support the Foundation in finding new ways to use its assets in service to our community, most notably through impact investing and other innovative social finance initiatives.

The Young legacy is just one example of the commitment that generations of many Hamilton families feel to their community and its future. Hamilton may change over the decades, but Hamiltonians remain steadfast in caring about their city and each other.

60  
years



## Responding to a critical need

### Grant Story | Cutting treatment delays for abused children

It's hard to accept that children as young as three are being sexually abused. But that is a reality the Community Child Abuse Council faces squarely every day. They provide proven treatment, education, and prevention programs to Hamilton's abused children.

Timely treatment is transformative for children who suffer sexual abuse and the devastating effects of that betrayal of trust, says the Council's executive director Karen Smith. "The good news is that when children receive prompt treatment from our professional clinicians, they do recover from this trauma and live healthy, productive lives. We know that. But the longer they wait for treatment, the worse their symptoms get."

When the Council came to Hamilton Community Foundation and explained that referrals to their program were so high that children were waiting too long for treatment, we responded.


The Edith H. Turner Foundation Fund provided a grant. HCF also approached The Lillian and Marvin Goldblatt Family Fund, which has a similar focus on children and youth. Deeply moved by

the situation of these youngsters, this fund too stepped forward with additional support.

Together these grants allowed the Council to cut the waiting list by 70 percent - saving many young children lifelong turmoil.

HCF fundholders Pioneer Energy Foundation and the Losani Family Foundation Fund also generously support the Council, and Karen says she is grateful to HCF for shining light on this issue. Some donors have even offered help to raise awareness about the need to have stable resources for these essential services.

"The bigger picture is this," says Smith. "We can give kids their lives back when we're able to treat them early - but if resources don't allow that to happen, the future of our community suffers as much as these young people do. The long-term solutions to child abuse are a responsibility of the whole community. Support from HCF and its donors creates a vital ripple effect. By facing the reality of child abuse, they help us open a community conversation about how thriving children are essential for thriving communities."



Prompt treatment is critical to recovery from abuse

## Cooking up a brighter future for women in transitional housing

### Grant Story | When your order is catered by *At the Table: Recipe for Change*, you're getting a meal with a message

The name says it all, says Denise Doyle, CEO of the YWCA which launched and operates the business. It was inspired by a woman who told staff she had never eaten at a table with others before coming to the Y. "We never forgot her words," says Denise. "This is the beginning for women moving on to independent living. Food is a part of that."

The short-term goals of *At the Table* are to provide delicious, healthy, high-quality food to local organizations that require catering, including the Y's own programs, and to offer culinary skills development opportunities to women in transitional living. The big dream is to operate a café.

*At the Table* is a social enterprise, using for-profit business strategies to earn revenue that is used to achieve social and community outcomes. Money earned from catering supports women in the YWCA's transitional living program—a 65-bed bridge between homelessness and independent living that serves more than 150 women in Hamilton every year. The catalyst was a grant from the Marchese Health Care

50th Anniversary Legacy Fund at HCF to put together a feasibility study and business plan. "This small investment allowed the program to blossom," says Denise. "The more people hear the story, the more interested they get in the work we're doing, which has allowed us to leverage additional support." A recent grant from HCF's Edith H. Turner Foundation Fund will allow the YWCA to pay for food handling training and certification, increasing the employment skills of the women in transitional living.

*At the Table* proves there's a real appetite in the community for a service that combines gourmet eats with food for thought. The program is breaking even months before celebrating its first birthday—an achievement for any small business, but especially impressive in the hospitality industry.

Alternate funding models like *At the Table* help to sustain these kinds of programs. Government funding for transitional living is difficult to secure and homeless women need significant support

on their journey. "I used to worry about where they would get food," says Denise. "Today, thanks to *At the Table*, they're eating two meals a day at the YWCA."



Gourmet eats from *At the Table*





## Love of community translates into meaningful results

### Grant Story | The Dougher Community Fund grew from a quiet appreciation of life in Dundas

Grants from the fund are dedicated to enabling others to have the same opportunity, now and forever.

The donor had a single goal: to ensure future residents would enjoy the community's many assets as she and her family had. It only made sense then that the first grant, in 2012, went to Dundas Community Services to reach out to the town to determine its highest needs. Focus groups, a community open house and an online survey pointed to priorities that included resources for seniors, accessibility for those with physical disabilities, poverty reduction, environmental education, youth engagement and access to the arts. As a result, these became the focus areas for the Dougher Community Fund.

Since this review, the fund has supported 15 projects, including playground naturalization, family art days, restoration of the Desjardins Canal, an information program for seniors, a youth centre and an assistive devices program.

This year, a grant to the 36-year-old Dundas Valley Symphony Orchestra will help its music reach new ears. "We want to attract a broader

audience and expand our repertoire by connecting with choral groups," says president Olga Hencher. The grant will be used to hire vocalists and coaches, purchase music and pay for additional rehearsal space to prepare for the group's annual lineup of six free concerts.

Another grant is providing a part-time community garden co-ordinator for four Dundas affordable housing sites. "We want to increase food security, reduce isolation and build capacity among Dundas residents, especially seniors," says Matt Bowen of City Housing Hamilton. "A staff person is critical to getting the project off the ground in a way that meets tenants' needs and is sustainable." When the project wraps up this fall, tenants will have a how-to handbook, a cookbook and connections with other food security programs, such as the Good Food Box, to see them through until the next growing season.

With its "forever focus" on the quality of life in Dundas, The Dougher Community Fund is a textbook case of helping people give in a way that has meaning to them and impact in their community.



The Dundas Valley Symphony Orchestra

## Read to Your Baby offers a prescription for lifelong learning

### Grant Story | A physician's prescription for learning invites parents to share the gift of literacy with their kids

There isn't a pill to improve literacy. But a new program is offering a prescription that's getting families off to a great start.

*Read to Your Baby* provides family physicians with the tools to start important conversations with parents about reading, including a free picture book (available in English and French), a fun "prescription" for daily reading and an invitation to get a library card for the child. It all takes place at the 18-month well baby visit.

"We're educating parents as the primary educators of their children," says Evette Sauriol, early literacy specialist with Affiliated Services for Children and Youth. "We believe the gift of literacy supports children in reaching their full potential." Research shows reading to preschoolers gives them the literacy skills necessary for early school success. Storytime also strengthens the parent-child bond.

The program is working: an evaluation by the Best Start Early Years team showed that more than 80 percent of parents who

weren't reading to their child previously said being given the book has made a difference to their literacy activities.

An HCF grant will allow *Read to Your Baby* to expand from 49 to 150 physicians—covering half of the babies born in the city each year—as well as support an awareness initiative to ensure long-term sustainability of the program. HCF also connected *Read to Your Baby* to First Book Canada, an organization that provides access to new books for children in need. Additional funding for book purchases has come from Telling Tales. The prescription pads were developed by the Canadian Paediatric Society and printed by the Offord Centre for Child Studies.

The program is founded on strong partnerships with healthcare, early learning and education groups and the library. Dr. Jean Mullens, a family physician with the Hamilton Family Health Team, is a true champion. "Parents are thrilled to get the book from our nurses and are usually reading it to their baby when I come into the room," she says. While some of the families

Jean sees may be economically disadvantaged, she stresses that this is a universal program. "All parents need the reminder to read to their babies."



photo courtesy Read to Your Baby

Dr. Jean Mullens with a *Read to Your Baby* kit

## Renowned actor demonstrates hometown love

**Donor Story** | John Frid's bequest culminates generations of support from one of Hamilton's most community-minded families

John Frid – also known by his stage name Jonathan Frid – was an accomplished actor with a 50-year career that began in a school play at Hillfield School, the precursor to Hillfield Strathallan College.

He pursued his love of acting at the Hamilton Players' Guild and, after serving in the Royal Canadian Navy during WWII, John graduated from McMaster University in 1948. He went on to the Royal Academy of Dramatic Arts in London and later to the Yale School of Drama.

To the public, he was best known for his role as vampire Barnabas Collins in the gothic TV daytime drama *Dark Shadows* that aired 1,225 episodes between 1966 and 1971. He received a reported 6,000 fan letters a week at the height of the show's popularity and continued to attend *Dark Shadows* festivals throughout his life. But that role was just one aspect of a distinguished career that included starring roles in theatre and television in the U.S., Canada and England, opposite stars like Katharine Hepburn and Jean Stapleton.

Although he spent much of his life in New York City, he remained a Canadian citizen and kept strong ties to Hamilton, ultimately moving back to Ancaster in 1994. Says his nephew Donald Frid, "I think he wanted to be close to family and friends in the latter stages of his life. Despite living away for so long, he knew his heritage was here. He was very proud of the city."

John believed in the Foundation as a way of supporting a vibrant community. His father Herbert Frid was one of the founders of HCF in 1954 and his mother Flora served on the Foundation's Board in the 1960s. Their generous philanthropy continues to this day through the Community Fund's Herbert P. & I. Flora Frid Fund. Their son is following in their footsteps.

"My uncle John was warm, encouraging, and generous, like his mother was," says Don.

John established his fund in 2002 and enjoyed seeing the difference his gift made during his lifetime. His gift ensures that the John H. Frid Fund will continue that legacy to the Hamilton community he loved.

## A commitment to the community

**Donor Story** | The Creaghans believe in small changes making big differences to build and nurture a community

Michael and Louise Creaghan share the belief that commitment to family then community is crucial. Both have volunteered extensively throughout their lives and know first-hand that working with others on grassroots projects gives people a sense of caring for their neighbours. Whether it's through daycare, school organizations, sports, church and volunteer associations, people need to find ways to contribute. They point to the Cathy Wever Elementary School in north Hamilton as a good example of the difference community involvement can make for a neighbourhood. The steps may be small and it may take time to see results, but the approach works.

The couple both spent long careers in education in Hamilton – Michael as a teacher and guidance counsellor; Louise as an English and physical education teacher and then, after raising their own children, as an ESL teacher giving young new Canadians 180 minutes each day of, as she calls it, "fundamental survival English." After working in many Hamilton schools, they retired together from Sir John A. Macdonald Secondary School in the downtown.

It's natural that their philanthropic passion is helping nurture community vitality. The Creaghans approached Hamilton Community Foundation with a general sense of what they wanted to do through their fund: provide support to organizations that are building and improving the community. To achieve this, Michael and Louise rely on the Foundation's research and knowledge to propose specific projects that target community priorities.

"The Foundation staff identify urgent needs and present them to us, knowing the kinds of change we want to support," says Louise. Examples of their contributions include support for the Native Women's Shelter renovations and the Neighbourhood Leadership Institute that HCF has launched to encourage and train local grassroots leaders. As Michael points out, their investment has often been the catalyst for others to provide support as well.

The Creaghans rely on the skill and sensitivity of the Foundation's staff, their in-depth knowledge and understanding of community needs and opportunities.

They also commend Hamilton Community Foundation's ability to provide co-operation and leadership to other organizations in a non-partisan way.



Michael & Louise Creaghan



Vampire Barnabas Collins, as played by Jonathan Frid

## 100 percent commitment

### Donor Story | We've always known that HCF staff are committed to this community

An outstanding measure of that commitment: they all give to Hamilton Community Foundation and have for many years.

"It hammers home to me how dedicated the staff are to HCF's mission," says Board chair Paul Gibel. "There are other places they could work with their great skills, but they are fully engaged in what we are trying to achieve. It's more than a job. They prove that with their work, and they prove it with their financial contributions. As chair, it gives me a tremendous feeling of confidence."

The staff fully embrace the idea that anyone can be a philanthropist and the Foundation can meet anyone's charitable goals. Each employee gives to the cause he or she cares most about, supporting more than a dozen funds overall.

"We believe in the work we do," says Morag Halsey, whose voice has welcomed callers to HCF for most of her 14 years at the Foundation. "It just makes sense to contribute financially too." Morag's special cause is children and she

directs her gifts to the Hamilton Spectator Summer Camp Fund. She remembers the challenges of being a single parent and appreciates the opportunities the Summer Camp Fund gives disadvantaged kids every year.

Anne Lupkoski has worked at HCF for 25 years, assisting three CEOs. She supports the Youth Advisory Council (YAC) program. Her own children have participated over the years and she is passionate about the growth she sees in them and others because of the YAC opportunity.

As grants manager, Sharon Charters knows Hamilton's needs well. She also knows from family experience the importance of mental health initiatives, so she chooses to donate to the Angel Fund, started by Shirley Elford, to focus on programs in this area.

"I think each of us gets a sense of fulfillment from supporting the priority that's closest to our heart," says Sharon. "It's something we all feel as staff contributors, just the way other donors do."

## A shared history in Hamilton

### Donor Story | ArcelorMittal Dofasco is one of a growing number of companies establishing funds with HCF

ArcelorMittal Dofasco Inc. has been a key player in Hamilton's history since 1912 and is known for over a century of service to this community. This year, the company has established a new resource for its corporate philanthropy: the ArcelorMittal Dofasco Fund at Hamilton Community Foundation.

Continuing its long-standing tradition of building community strength, ArcelorMittal Dofasco's new fund aims to invest in organizations that enrich the community and change the lives of children and youth in the Hamilton region. Access to inspiring programs, imaginative arts, nourishment, and nurturing health care are some of the youth priorities.

"We know the importance of sparking a child's curiosity," says Tony Valeri, the company's Vice President of Corporate Communications and Public Affairs. "It can be the seed of great things to come. Children need only a glimpse of what's possible, followed by the support to make it happen. Hamilton can be the best place to raise a child and we are proud to play a role in making this happen."

"Hamilton Community Foundation and ArcelorMittal Dofasco share a long history in Hamilton and some

crucial connections," says HCF's President & CEO, Terry Cooke. "For many of the Foundation's 60 years, Dofasco has offered leadership to us in the form of Board members. Trixie Sherman, spouse of past-chairman and CEO Frank H. Sherman, was the first to serve in 1965 and many others have contributed their time and expertise since."

In addition to funding current grants, the newly established fund is permanently endowed for long-lasting impact.

"Like our company, Hamilton Community Foundation has expertise in creating innovative solutions and partnerships to advance our community," says Tony Valeri. "We're looking forward to working together to continue building the community's strength."

"We are thrilled to be part of ArcelorMittal Dofasco's philanthropic outreach," says Terry Cooke. "The company has a history of charitable giving in the community that is legendary. We are honoured to be a part of it."



Hamilton Community Foundation staff



Excited about ArcelorMittal Dofasco's community investment at Supercrawl 2013



# *A Hamilton landmark leaves its legacy*

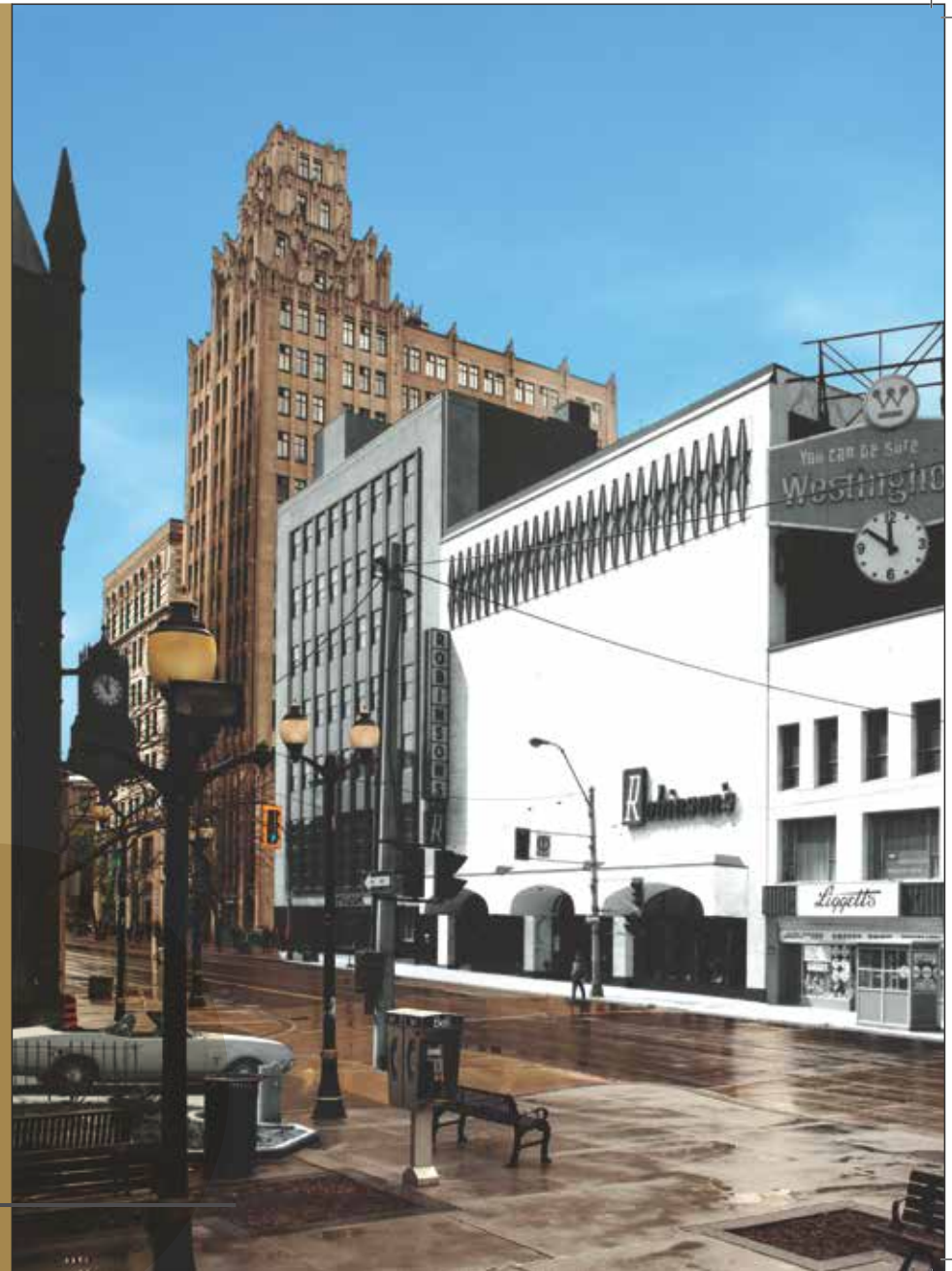
**1964 to 1973** Robinson's department store was a landmark for decades in Hamilton and many people fondly remember shopping there in the 1960s and 70s.

The stores are gone now, but the legacy of the founding family lives on at Hamilton Community Foundation.

When Kathleen Robinson McBride, the daughter of the department store's founders, passed away she left her estate to HCF's Community Fund. Her generous bequest was the largest unrestricted gift the Foundation had ever received. To this day, it fulfills her intentions of addressing the community's highest needs and priorities.

Kathleen and her husband Robert McBride also had a daughter, Peggy, who created a private foundation in 1966. She later transferred her foundation to HCF and in honour of her long-time lawyer, Doug McCallum, who had devoted much time and energy to her foundation, it was renamed the McCallum, McBride Fund. Its annual grants for environmental issues and abused women and children touch hundreds of lives in Hamilton every year.

60  
years



# Community leadership

Leadership on issues that affect Hamiltonians is one way the Foundation works to improve the quality of life in this city.

## Building healthy neighbourhoods

For over a decade, HCF's Community Fund has focused on reducing poverty and improving the quality of life in challenged neighbourhoods. This year, working in conjunction with the City of Hamilton's Neighbourhood Action Strategy, the fund focused on enabling residents to realize the action plans they have developed for their communities. Representing the input of hundreds of citizens, the plans touch on activities as varied as beautification, improved safety, traffic calming and block parties which help neighbours to meet and engage in community building.

Our work also included spearheading the Neighbourhood Home Improvement Program which engaged businesses, non-profits, the City and provincial government, demonstrating the strength of partnerships focused on neighbourhoods. HCF continues to fund the services of community development workers who help resident leaders engage and connect neighbours with each other.

## Neighbourhood Leadership Institute

This pilot program aims to enhance the skills of neighbourhood leaders. This year the program has evolved to include more community organizations in creating and delivering training

content alongside Mohawk College. Mohawk has also certified the program, enabling graduates to receive a college credit. Researchers from McMaster University are evaluating the program to determine how it can be most effectively delivered including the potential for rolling it out more broadly across Hamilton.

## Increasing access to post-secondary education

Recognizing the impact that changes such as higher rates of literacy, high-school graduation and post-secondary access would have on our community, HCF is increasingly focused on education as a means to a vibrant, inclusive Hamilton.

We are completing our research on what a "Promise" program—an initiative to support graduates of publicly funded schools to go on to post-secondary education—could look like in Hamilton. A key finding to date is that finances are only one barrier to successful post-secondary access and completion, so we are expanding our research to better understand current thinking on how to address the range of barriers. Our partners include Dr. Doug Willms, a respected international scholar on the effects of poor early literacy in future learning, as well as the Higher Education Quality Council of Ontario. The Council is a provincial agency whose mandate

includes enhancing access to Ontario colleges and universities. Its extensive research covers many influencing factors, including the community context — those aspects that are unique to any one jurisdiction. Based on this knowledge, which will include community input, we expect to design a "made-in-Hamilton" intervention.

## Hamilton Roundtable for Poverty Reduction

The Foundation and the City of Hamilton continued to co-convene the Hamilton Roundtable for Poverty Reduction which focuses on system-level change to reduce and eliminate poverty. This year, the Roundtable launched *Speak Now Hamilton*, a speakers bureau that has brought together 25 people, who have diverse but direct experiences with poverty, to share their stories. Members have received training in public speaking, media engagement and public policy and are available to speak at schools, faith organizations, service clubs and to business audiences. The goal is to inform, educate and break down stereotypes.

The Roundtable's action on Living Wage gained momentum in 2013 through efforts to engage private, public and non-profit sector employers in the value of lifting all workers above the poverty line. Following the Hamilton-Wentworth District School Board's leadership in becoming Ontario's first public sector employer to adopt a living wage policy, several local businesses have committed themselves as living wage employers. The Roundtable continues to engage all levels of government around the need to invest in

poverty reduction, and to support adequate income security programs and a livable, vibrant community.

## Hamilton Action Revitalization Campaign

The Action Campaign is a project designed to accelerate James Street North revitalization. Citizen engagement is central to the Action Campaign, and will integrate existing community plans and projects, with the goal of catalyzing redevelopment in this area and providing a model for other areas of the city. Possible projects include neighbourhood parks, food gardens, a greenway corridor along the railway tracks and remediation of waterfront industrial lands. The project manager is Evergreen CityWorks, a national charity whose mission is fostering sustainable infrastructure in Canada's cities. Evergreen has conducted a number of Hamilton projects and is best known for the Brick Works, a former brick quarry and factory in Toronto's Don Valley that has been converted into an urban environmental park.

The Action Campaign was sparked by a gift to HCF from The Michael Young Family Foundation, and a contribution from The Young Fund, leveraging additional funds from the City of Hamilton. James Street North was selected as the ideal location to advance many of the City's strategic plan elements including developing the downtown and waterfront. The area is also central to two of the communities in the Neighbourhood Action Strategy where HCF has been working for more than a decade.

# *The first fund is still powerful*

**1974 to 1983** The first fund established outside of the Community Fund, was the Chaney-Ensign Bursary Fund in 1976.

Genevieve Chaney and Cordelia Ensign were twin sisters, both teachers, and their intent was to help Hamilton young people who were in serious financial need to access higher learning.

The impact of this fund is hard to overestimate: close to 700 local students have received support over the years, without which they might never have progressed to post-secondary education. They include scientists, lawyers, teachers, business leaders, and countless others who continue to have an influence in Hamilton today.

Hamilton lawyer Sandra Stephenson and her three sisters all received Chaney-Ensign bursaries after their father suffered a stroke and the family's sole source of income fell dramatically. Sandra, a past HCF chair, was recently awarded the prestigious Law Society Medal recognizing those who have "advanced the core principles of access to justice and equality through their unique contributions to their communities."

Almost 40 years since its creation, the Chaney-Ensign Bursary Fund continues to support the educational aspirations of young Hamiltonians – an outstanding example of the power of the community foundation model.

60  
years



# Funds and contributors in 2013-2014

People who give to Hamilton Community Foundation share the desire to make a difference for Hamilton, forever. Gifts to HCF are pooled and invested; investment income is the primary source for grants made.

As a Foundation donor, you can create your own fund or give to an existing one. We are pleased to work with you and your professional advisor to find the approach that meets your goals and circumstances. Please call us at 905-523-5600 or visit [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca) for more information.

*Amounts shown reflect total accumulated gifts to each fund.*

## Community Fund

Giving to the Community Fund provides HCF with the greatest flexibility in responding to the community's needs. Gifts of any amount are welcome. Donors whose accumulated endowed gifts total \$5,000 may choose to have a named fund within one of the following Community Funds.

### Community Fund/Unrestricted funds

This fund addresses the highest charitable priorities in the community. The individual funds are listed below.

Donald J. Allan Fund	103,514	William F. Brand Fund	8,404
Marjorie L. Allan Fund	5,000	Marnie & Bill Brehm Family Fund	23,500
Doris M. Allen Fund	172,918	Dorothy & Travice Broadbent Fund	7,000
Caroline May Alvey Fund	118,000	Mary & Earl Brooks Fund	1,130,000
Frances W. Ambrose Fund	5,600	Ernest & Ruth Brunton Fund	20,000
Helen Mary Archambeault Fund	25,316	Irene Caldwell Memorial Fund	10,000
Lillian Boyd Barnby Fund	10,000	Henrietta F. Campbell Fund	104,959
Gilbert P.V. Belton Fund	175,088	Donald & Alice Cannon Fund	9,225
Horace A. Bennett	10,000	Charlotte Cauley Fund	34,987
Anne M. Biggar Fund	460,327	Dorothy Cauley Fund	78,831
Doreen & Gordon Birk Fund	98,409	M. Jessie Chagnon Fund	71,196
Sandra & John Black Fund	104,330	Harold E. Clarke Fund	86,120

Florabel Condy Fund	25,000	Francis Spence Hutton Fund	32,650
Cooke Family Fund	12,850	Ralph E. Ingraham Fund	16,017
Petra Cooke Memorial Fund	22,650	W. Jones Fund	25,920
Donald A. Cooper Fund	40,126	William Gordon Kitchener Fund	60,000
Ralph W. & Evelyn J. Cooper Fund	151,000	Lakin Family Fund	8,850
<b>Ian &amp; Donna Cowan Fund</b>	<b>5,350</b>	Langs Family Fund	67,639
Robert D. Crockford Fund	14,075	Daniel T. Lawrie Fund	115,529
Vangie M. Crosthwaite Fund	40,000	Mabel D. Leadlay Fund	75,891
Renate & Bob Davidson Fund	9,000	Elizabeth Lee Fund	11,775
A. May Davis Fund	41,598	Russell & Mae Lindley Fund	10,400
E. Francis Dennee Fund	24,322	Dorothy I. Linfoot Fund	20,588
Alphonse Dirse Fund	48,344	Evelyn Patricia Lyons Fund	5,000
Vera M. Elwin Fund	536,235	Cameron K. MacGillivray Fund	9,325
Fell Family Fund	30,065	Josephine Magee Fund	204,057
Eleanor Foster Fund	869,072	D. Argue Martin Fund	20,340
Herbert P. and I. Flora Frid Fund	325,000	Dr. Carl Martin Memorial Fund	5,000
John H. Frid Fund	547,369	Kathleen L. McBride Fund	11,632,794
Gallagher Family Fund	52,700	Robert P. McBride Fund	1,636,012
Margaret & William Gilmour Fund	8,380	The Samuel & Dora McFarlane Fund	14,000
Robert C. & L. Ann Glass Fund	70,000	Brenda & Reg McGuire Fund	5,150
Erma Z.L. Goering Fund	888,437	Lindsay M. McLennan Fund	78,022
Alice Redman Gooch Fund	25,025	Flora L. McNeil Fund	30,165
Dr. Ronald P. Graham Fund	16,814	Jack McNie Fund	26,000
Averil Gray & Florence Gray Fund	1,172,308	Meredith Family Fund	14,550
J.M. Walter Hahn Fund	5,000	Frederick J. Mills Fund	26,189
Elizabeth Mary Hamilton Fund	30,000	Eleanor Jean Milton Fund	63,610
Christina I. Hammant Fund	250,000	Alice Vera Morgan Fund	338,065
Helen Gertrude Harrison Fund	34,222	Brenda Morris Fund	5,000
Robert J. & Joan Harrison Fund	10,266	Mount Hamilton United Church Legacy Fund	20,000
Lulu Blanche Hart & Harry Utter Hart Memorial Fund	778,782	Catherine C.H. Murray Fund	50,050
Mary E. Hatch Fund	116,000	Annie S. Nieman Fund	36,081
Margaret Anne Hayward Fund	797,598	Dr. Alexander A. Numbers Fund	5,844
Donald H. Henderson Fund	408,597	<b>Peter &amp; Rose Marie Palmer Fund</b>	<b>5,215</b>
Gordon & Ethel Holmes Fund	97,572	Laurence Cholwill Patterson Fund	351,146
Erie Hossack Fund	58,638	Stewart Philp Fund	45,000
Clare B. Hunter Fund	13,079	James & Mary Phin Fund	106,545
Mildred E. Hunter Fund	100,878	Project Sunday Fund	8,771
Elsie M. Husband Fund	12,300	Ethel H. Prouse Fund	181,684

*Funds shown in **bold** were established in 2013-2014.*





Charles & Catherine Ralph Fund	43,131	Ruth G. & Fred J. Spencer Fund	22,000
James D. Redmond Fund	6,033	Leanora M. Spicer Fund	26,600
Edna E.R. Reeves Fund	78,766	Evelyn & Richard Geraghty Storms Memorial Fund	25,000
Reynolds Family Fund	131,939	Mabel Beatrice Studd Fund	15,000
Samuel Ringer Fund	70,586	Alfred Charles & Pearl Gertrude Swanwick Fund	200,000
Edna Robertson Memorial Fund	29,000	A.H. Tallman Bronze Co. Ltd. Fund	21,790
Royal Hamilton College of Music Faculty Fund	5,963	Vincenza Travale Fund	16,200
Jessie Rumney Fund	10,000	Margaret E. Tschetter Fund	383,739
Joan W. Rutherford Fund	5,000	Howard & Edna Tugman Memorial Fund	100,000
Bertha Savage Fund	47,806	Eulalia D. Wall Fund	170,977
Martha McKinnell Serrels Fund	94,682	West-Moynes Fund	8,500
John Shea Memorial Fund	8,387	Gladys A. Whittaker Fund	26,205
Eleanor M. Smith Fund	10,000	Noreen & Seymour Wigle Fund	15,000
Grace J. Smith Fund	13,030	Marjorie Wild Fund	30,666
Patricia Eileen Smith Fund	5,150	James & Irene Wilson Fund	6,000
Sarah Smith Fund	230,729	Jack A. Winser Fund	155,007
William S. Sparham Fund	25,236	Anonymous and other gifts combined	1,385,348
Robert George Sparre Fund	34,410		
The Spectator Fund	10,000		
Marnie Spears Fund	16,820		

### Community Fund/Arts and culture endowment funds

This fund addresses needs and priorities in the arts and cultural sector in Hamilton. The first \$1 million of gifts will be matched by the Foundation. As of March 31, 2014, there have been no contributions to this fund.

### Community Fund/Environment endowment funds

This fund supports a range of initiatives and organizations that are key to Hamilton's environmental well-being. The first \$1 million of gifts will be matched by the Foundation. As of March 31, 2014, gifts totalling \$316,007 have qualified for a matching contribution. The individual funds are listed below. The amounts listed include matching funds.

Robert D. Crockford Fund	10,120	The Young Fund	15,145
Irene Emily Lowes Fund	21,494	Other gifts under \$5,000	6,245
U.S. Steel Canada Environment Endowment Fund	600,000	Fund matched gift total	\$653,004

## Field-of-interest funds

These funds enable donors to support a specific interest area, e.g. the environment, children's needs, the arts, etc. The Board of Directors selects the most appropriate recipients each year.

Ike & Shahnaz Ahmed Foundation Fund	51,650	Ray Lowes Environmental Fund	455,716
The Alice Jean Ainsworth Memorial Fund	1,711,648	Marchese Health Care 50 <sup>th</sup> Anniversary Legacy Fund	50,000
Nelson Allan Fund	141,040	George & Shirley McBride Foundation Fund	1,062,576
The Angel Fund*	117,405	Carolyn A. Milne Leadership Forum Fund	46,662
Mary Lauder Cassidy Fund	126,142	<b>Barbara North Fund</b>	<b>25,000</b>
Community Health, Education & Research Fund	1,054,547	Note-Able Music Fund	59,030
Dorothy & Frank Bliss Fund	508,839	Pioneer Energy Fund*	1,038,055
McGregor Clinic Fund	118,478	Alfred & Joan Robertshaw Memorial Fund	609,050
Mary S. & James P. Phin Respiratory Disease Research Fund	426,180	Royal Canadian Humane Association Fund	69,233
Giovanni & Grazia Criminisi Literacy Fund*	31,135	School Sisters of Notre Dame Legacy Fund	
Delaware Fund	360,552	Jeanne Scott Fund*	27,568
Dougher Community Fund	2,409,200	Bill & Tina Seale Fund	123,120
Shirley M. Elford Gift of Today Fund	112,900	The Glenn & Sidney Sellick Fund	10,000
Russell I. Elman Fund	233,473	Lillian M. Shaw Fund	166,713
First Place, Hamilton Tomorrow Fund	236,075	W. Robert & Marion S. Shivas Conservation Trust Fund	280,547
Foxcroft Family Youth Fund	37,200	Charles & Ret Swire Fund	154,835
Betty & Jack George Family Fund	35,060	Fund for Underprivileged Children	438,525
Gibson Trust/Town of Flamborough	30,885	The Van Dusen Fund*	465,601
Edward & Gladys Halloran Memorial Fund	808,885	Joan C. Watt Memorial Fund	38,000
Hambro Fund	40,000	Women 4 Change Fund	103,918
Barbara & Bob Harwood Fund	104,903	Kenneth Boothe Young & Marie Catherine Young Fund	1,294,919
Florence E.S. Hutton Fund	523,907	Youth & Philanthropy Fund	105,008
Arthur & Helena Lemon Fund	75,000		
Jane C. LeWarne Fund	15,000		
Antonina Lombardo Fund	145,000		

\* These funds contribute to the Community Fund/Unrestricted funds





## Ontario Endowment for Children & Youth in Recreation Fund

The amounts listed include funds matched by the Province of Ontario until March 2002 to encourage the participation of children and youth in recreation.

The Emma Templeton Fund	293,116	PricewaterhouseCoopers LLP Hamilton Children and Youth Millennium Fund	10,500
The Mildred E. Hunter Fund	163,626	The Deslauriers Fund	10,200
The Hamlin Family Fund	100,000	Judith & Peter McCulloch Fund	10,200
Anonymous Fund	75,624	Bank of Montreal Fund for Children & Youth in Recreation	10,000
Mr. & Mrs. Colin S. Glassco Fund	40,000	The CHML Children's Fund	10,000
The Junior League Centennial Endowment Fund for Youth	40,000	The Clark Family Fund	10,000
Pioneer Energy Fund for Children & Youth	40,000	Gallagher Family Fund	10,000
The David Gow Fund	20,000	Morgan Firestone Foundation Fund for Youth	10,000
Hamilton – Hydro Electric Company Fund	20,000	Zonta Club of Hamilton #1 Fund	10,000
TD Bank Financial Group Fund	14,000	Other gifts under \$5,000	90,734
The Foxcroft Family Fund	12,000	Fund matched gift total	\$1,000,000

## Donor-advised funds

These funds enable donors to recommend the charitable organizations or programs to receive grants.

Hugh C. Arrell Memorial Fund	11,638	Mildred Dixon Holmes – Youth Orchestra Fund	366,278
Ella Baird & Grace Baird McQueen Memorial Fund/A.J. McQueen	27,000	Hutton Family Fund*	
W.L. Carpenter Memorial Fund*	2,256,064	Kirkpatrick Fund	51,350
Michael Chamberlain Fund	241,055	Lawyers' Legacy for Children	198,309
Clark Family Foundation Fund	981,500	<b>Losani Family Foundation Fund</b>	<b>163,125</b>
Lois Evans Natural Heritage Fund	80,000	John & Esther Marshall Memorial Fund	220,409
Elham & Joseph Farah Family Foundation Fund*	50,250	The Martin Foundation Fund	1,210,653
Fengate Community Foundation Fund*	1,000,000	Mayberry Family Fund	154,500
The Ron & Gina Fraser Endowment Fund	25,000	McCallum, McBride Fund	928,494
The Gilmour Fund	183,204	Carolyn & Paul Milne Fund	37,105
Tara Lynn Giuliani Foundation Fund	214,254	Audrey & Alan Moffett Fund	
Lillian & Marvin Goldblatt Family Fund	200,000	Mark & Barbara Nimigan Fund	106,519
Heather & Ross Hamlin Fund*	8,678,151	Kathleen C. Nolan Education Fund	35,235
Heels Family Vocal Award Fund*	147,144	John & Mary Reesor Fund	150,000
		Ed Smee Conserver Society Environmental Fund	33,953

Glen & Debra Swire Fund	48,100	Edith H. Turner Foundation Fund	8,279,932
Thorne Family Fund	32,276	Williams Family Fund*	66,000
Tran Family Fund*	31,000	The Young Fund*	40,534,900
Karen & Peter Turkstra Family Foundation Fund		Several anonymous funds	711,679

## Designated funds

These funds have been established to benefit specific charities named by the donor.

Douglas J. Clark Fund*	100,000	PHOG Endowment Fund	311,220
Cygnus Fund	104,300	Samaritans' Tithe Fund	244,967
Walter & Mildred Danby Fund*	352,336	Stoney Creek Health Fund/ Dr. Bob & Mildred Kemp	561,583
Frank Charles Miller Fund*	1,260,912	United Way Fund/Kenneth R. Walsh	144,291
Phenix Fund for Animal Welfare	107,896		
James P. & Mary S. Phin Charitable Fund	177,575		

## Scholarship and bursary funds

These funds assist and encourage promising students, including those challenged by education costs.

General Bursary Fund/Genevieve A. Chaney & Cordelia C. Ensign	509,486	Lee Hepner Award Fund	17,813
<b>Cowan Family Fund</b>	<b>25,000</b>	Mildred Dixon Holmes – Artist of the Year Fund	30,000
James Darby Bursary Fund	410,301	Russell & Elizabeth Lindley Fund	145,370
Eugene B. Eastburn Fellowship Fund	511,438	Music Bursary Fund	38,304
Howard Fairclough Organ Scholarship Fund	51,922	Rundle Foreign Study Bursary	32,070
Geritol Follies Bursary Fund	118,175	John E. VanDuzer Scholarship Fund	27,118
Daniel Giannini Fund	958,562	Albert & Betty Walters Fund	57,488
Christina Hamilton Scholarship Fund	26,734	Jervis B. Webb Company of Canada Scholarship Fund	200,000
William Allison Haynes Fund	20,700	Ross F. Webb Bursary Fund	40,000

## Agency endowment funds

These charitable organizations have established funds to provide a source of income to carry out their work.

AbleLiving Services Inc. – Mary Traini Legacy Fund	81,557	Hamilton Public Library – Library Legacy Fund	413,491
Art Gallery of Hamilton – Building a Legacy Fund	253,678	Interval House (Hamilton) Freedom and Hope Fund	90,080
Catholic Children’s Aid Society – Ralph and Rose Sazio Scholarship Fund	107,666	<b>Dr. Bob Kemp Hospice Endowment Fund</b>	<b>109,909</b>
Hamilton Naturalists’ Club:		Rotary Club of Hamilton – Rotary Forever Fund	81,195
Habitat Preservation Endowment Fund	156,545	Scouts Canada, Hamilton Wentworth Endowment Fund	164,070
Conservation & Education Endowment Fund	42,706	United Way Tomorrow and Forever Fund	1,423,951
Ecological Research Endowment Fund	26,107	YWCA Hamilton Endowment Fund	752,296

## Administration funds

These funds have been established to support the administration of the Foundation’s community leadership, development, grantmaking and communication programs.

Cameron K. MacGillivray Fund	21,140	Marjorie & Bill Nelson Fund	100,000
Ross & McBride, LLP Fund	24,609	Thérèse & Kent Newcomb Fund	10,000
Judith McCulloch Tribute Fund	11,041	Brenda & Terry Yates Fund	107,090
Judith & Peter McCulloch Fund	42,538	Other gifts combined	12,654

## Funds held on behalf of others

These funds have been placed with the Foundation for long-term investment by other charitable organizations.

Burlington Community Foundation Fund	5,374,400	Hamilton Public Library Funds:	
Children’s International Learning Centre Fund	1,544	Capital Endowment Fund	238,635
		Ketha McLaren Fund	14,880
		Special Gifts Fund	465,128

## Funds in progress

Donors interested in working with HCF may choose to build their funds gradually.

Bay Area Science & Engineering Fair Fund	CPRS Hamilton Legacy Fund	Hundred Waters Foundation Fund*
Robert P. Beres Fund	<b>Jeffrey Croonen Foundation Fund*</b>	Porto Family Fund
Board Leadership Fund	David Davis Memorial Fund	Mark Preece Family House Endowment Fund
Bruce Trail Conservancy Endowment Fund	Jeff Dickins Memorial Fund	Revolution Hope: Claire Lewis Foundation Fund
Marjorie Dell Clark Fund	Dream Weaver Fund	
Conductive Fund	Shirley M. Elford Artist’s Fund	
Amanda Marie Cowan Memorial Scholarship Fund	Bruce Hamilton Family Fund*	

## Flowthrough funds

The capital and income from these funds is distributed over time.

Ambery Fund	Farah Charitable Fund	Pioneer Energy Foundation
Bay Area Arts & Heritage Fund	Ron & Gina Fraser Fund	Protecting Our Environment Together (POET) Fund
Bruce Trail Expedition for Kids Fund	Hamilton Prosperity Fund	School Nourishment Fund
Children’s International Learning Centre Growth Fund	Hamilton Spectator Summer Camp Fund	Social Enterprise Fund
Marlies & Alan Clark Fund	The Hogarth Family Foundation Fund	True Sport Fund
Ellen Creaghan Fund	Payne Fund	Young Response Fund
		Anonymous funds*

## Life insurance policies

The Foundation owns and is beneficiary of life insurance policies donated by Sheila Davies, Margaret E. Gage, Diana Hogarth, Helen F. Lofthouse, Judith McCulloch, Barbara Bethune Souter, Joan VanDuzer, Ronald J. Zabrok and two anonymous donors.

Total face value: \$5,058,130

## Estates and funds under trustee administration

At the time of publication, the Foundation had been notified of a charitable gift (subject in some cases to the life tenancies of others) in the following estates or trusts: Alice J. Ainsworth, Mary Blanche Brooks, James Walker Culhane, Isabel Dougher, Clara Isobel Elman, Barbara Luella Farnan, Victor Roy Farr, Edna Fern Flewelling, John Herbert Frid, Dr. C. Robert & Mildred Kemp, Mary Joan Bonner Renison, Joan Kathryn Robertshaw, George Kookson Seliga, Vincent Michael Wajar.

## Contributors

Hamilton Community Foundation sincerely thanks the following contributors for their gifts this year:

AbleLiving Services Inc.	Bob & Maggie Carr	Shirley M. de Leeuw	Grant Thornton LLP	Dr. Jack & Ann Laidlaw	Alan Moffett
Ike Ahmed	Catholic Children's Aid Society of Hamilton	Tom & Laurie Deans	Mary Guise	Madeleine P. Laing	Lauren More
Alzheimer Society of Niagara Region	Chafrid Holdings Ltd.	Marnie Souter Denton	Dr. John & Gillian Gunstensen	Kathryn Lakin	Alex & Heather Moroz
Lise Andreana	Fred & Sharon Charters	Belma Diamante	Ken Hall	Paul & Pam Lakin	Dr. Henry & Betty Muggah
Maria Antonakos	Harold & Joanne Cheatley	Terry & Grace Diffey	Brian & Morag Halsey	Lorraine Langham	Robert Munroe & Sheila Sammon
Caroline Archer	Jennifer Chivers	The Synod of the Diocese of Niagara	Hamilton Law Association	Tim & Dale Langs	Sarah M. Murphy
Dr. Jane Aronson	David & Anne Church	Kevin & Karen Dore	Bruce & June Hamilton	Colin G. & Barbara Lazier	George Nakamura
The Honourable Mr. Justice Harrison Arrell & Diane Arrell	Benjamin J. Ciprietti	Sandra L. Edrupt	Annette Hamm	The Honourable Mr. Justice Colin S. Lazier & Jocelyn Lazier	Daniel & Joan Nathanson
Affiliated Services for Children & Youth (ASCY)	City of Hamilton	Ann Elford & family	Paul & Helen Hanover	Paul Lee-Chin	Joyce Neal
Heidi Balsillie	Alan & Marlies Clark	Arlene Elford	Joseph & Joan Harbell	Dr. Arthur L. Lesser	Dermot P. Nolan
JoAnne Barresi	Bryan & Donna Clarke	William Ernst	Charles & Judy Hare	Angel Li	Denise O'Connor
Philippe & Mary Barrette	Stephen Clemens & Jill Anderson	Marion Fair	Nancy Harkness	Ruth Liebersbach	Erin O'Neil
Bay Area Science & Engineering Fair	Philip F. Connell	FEI Canada, South Golden Horseshoe Chapter	The Honourable Mr. Justice C. Raymond Harris & Beth Harris	Edward Liptay	Larry & Marnie Paikin
Duncan G. Bell	James Conner	Don Fell	Bob & Barbara Harwood	Faye Little	Peter & Rose Marie Palmer
Bethesda United Church	Connor, Clark & Lunn Private Capital	FELLFAB Limited	John & Leone Harwood	Lodge of the Ancient Landmarks	Gina Panavas
Bike for Mike supporters	Frank A. Cooke Sr.	Fengate Capital Management Ltd.	Dr. Joan B. Heels	Helen Lofthouse	James Pearson
John & Sandra Black	Terry Cooke & Maureen Wilson	Deirdre Finlay	Rob & Tami Henderson	Losani Family Foundation Fund supporters	Al & Lorraine Peckham
Fay Booker	William Cooke	Margaret Fischbuch	Neil Hendry & The Honourable Madam Justice Jane A. Milanetti	Bill & Anne Lupkoski	Christy Pettit
Wendy Brawn	Dr. Justin & Jessie Cooper	Frank & Lydia Fitz	Susan Hertell	Peter & Barb MacMillan	M. Geraldine Phenix
Bill & Marnie Brehm	Tom Cooper	Dr. Shawn Forbes	Murray & Diana Hogarth	Barbara Mahaffy	Shirley Picken
Hazel M. Broker	Chantal Copithorn	Brent & Sally Foreman	Charlie Hogg & Heather Gilmour	David Malcolm & Annette Aquin	Pioneer Energy LP
Bruce Trail Expedition for Kids supporters	Sandra Cornett	Bob & Margaret Freeborn	Dr. Sargent & Ruth Horwood	Glenn A. Mallory	Paul & Eunice Porritt
Ernest & Ruth Brunton	Anita Counter-Woolfenden	Jeremy Freiburger	Wendy J. Hough	Tom & Shahrone Marlor	Lydia Potocnik
Mary Buzzell	Pam Cowan	Patricia Fulton	Irene Hubar	Virginia Mattuzzi	PricewaterhouseCoopers LLP
Robert Byrnes	R. Ian Cowan	Thomas & Joan Gallagher	Luisa Hubner	Joan McAuley	Steve & Mary Prime
Don & Helen Callaway	Charles Criminisi	Paul Gibel	Michael & Linda Hughes	Mary McCallum	Probus Club of Hamilton
Canadian Association of Gift Planners	Donna Cripps	Grant & Sandy Gillies	Human Resources & Social Development Canada-NFP	Sheila M. McDougall	Judith Pyke
Alice A. Cannon	Robert D. Crockford	Mary S. Gilmour	Bruce & Linda Hutchinson	Norman & Marion McGugan	Diane Rawsthorn
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Jane Capell	Warren & Jean Currie	Robert C. & L. Ann Glass	Dean Jefferies	Janet McNaught	Donna Robertson
Richard & Carole Capling	Andrew Cushnie	Sarah Glen	Tom & Cheryl Jensen	Rev. Alan & Maureen McPherson	Paul Robinson
David Capson	Lisa Dalia	Jay Goldstein	Shirley A. Johnson	Archie J. McQueen	Rotary Club of Hamilton Sunshine Fund
James & Helen Cardwell	Dark Shadows Festival	Matt & Sarah Goodman	Ginny Jones	Ruth McQueen	John & Dr. Leila W. M. Ryan
	Adrienne Davidson	Susan Goodman	Kathryn Jones	Grahame & Sheree Meredith	Robert & Peggy Savage
	Bob & Renate Davidson	W. Ian Gordon, QC	Anju Joshi	Frank C. Miller	James A. Scarfone
	Dr. Meghan Davis		Sylvia Kajiura	Paul & Carolyn Milne	Michael Schwenger
			Hilary Kaler	Ruth Milne	Sandy J. Schwenger
			John Keeler & Nancy Rundle	Bill & Jane Milne	Tina S. Seale
			Helen Kirkpatrick	James Milner	Liza Sheard
				Evelyn Mitchell	Donna Sheldrake
					John Simpson

John & Darlaine Skirving  
 J. Neil Smith  
 Teresa Smith  
 Society of Arts & Science Students  
 Marnie Spears  
 Frederick J. & Ruth G. Spencer  
 Robert & Miriam Stanbury  
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 Glen & Debra Swire  
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 Peter & Karen Turkstra  
 Kenneth J. Tyler  
 U.S. Steel Canada Inc.  
 United Way of Burlington & Greater Hamilton  
 Joan Van Damme  
 Joyce Vanderpost  
 Joan VanDuzer  
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 Bill & Marilyn Wilson  
 The Winnipeg Foundation  
 Terry & Brenda Yates  
 Marita Zaffiro  
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 Christel Zeyl  
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Kumie Pather  
 Jenny Pearce  
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 Philip & Rose Sawka  
 Edna Schleichauf  
 Sherry Sleightholm

Jane M. Smith  
 Betty Soden  
 George Truman  
 Neil Vanderwal  
 Elizabeth Ward  
 Arthur Weisz

## Hamilton Spectator Summer Camp Fund

Hamilton Community Foundation thanks all donors who contribute to sending children to camp. Gifts of \$500 and over are listed below:

Beverly Armstrong  
 Burlington Concert Band & Pops Orchestra  
 CIBC World Markets Children's Foundation

Elizabeth Eldridge  
 Fabris Inc.  
 Hamilton Philharmonic Youth Orchestra  
 Imperial Vending Services Inc.

Real McCoys  
 Rotary Club of Ancaster AM  
 Rotary Club of Hamilton AM  
 Elizabeth Whetham  
 Eric & Marnie Willis

## Memorial gifts received in honour of

Anne Aquin  
 William Balfour  
 Joyce Barrett  
 John Bell  
 Marie Boyle  
 Don Brown  
 Linda Brown  
 Marion Campbell  
 Joseph & Mildred Cardwell  
 Michael Chamberlain  
 Marjorie Dell Clark  
 Wayne Cochrane  
 Joyce Cooke

Amanda Marie Cowan  
 Annie Mae Cowman  
 Peter Creer  
 Edna Cutler  
 Réal Dubé  
 Greg Elford  
 Justice Eugene Fedak  
 Thelma Gibb  
 Tara Lynn Giuliani  
 Beverly Guy  
 Bob Harwood  
 Hilda Henderson  
 Roy Howard

Dan Jodouin  
 Philippe Labrosse  
 Isobel Laidlaw  
 Clare & Sarah Lakin  
 Valerie Lennard  
 Norman Levitt  
 Rudy & Margaret Lupkoski  
 Lawrence Mills  
 Bernie Morelli  
 Bill Muir  
 Betty Newlands  
 Bill Newman  
 John O'Connor

## Tribute gifts received in honour of

Paul Berton  
 Molly Beube  
 Elaine Burgess  
 Janet Cannon  
 Mark Chamberlain  
 Charles Criminisi & Joanne Cupido

Lori Dessau Tauber  
 Glenn Gibson  
 Michael Lynes & Cathy Simon  
 Douglas Marrs  
 Ginny Mattuzzi  
 Sheree Meredith

Al & Donna Parker  
 Marc Pommainville & Stacy Allerton  
 Mr. & Mrs. Ken Robins  
 Ron & Eleanor Steepe  
 Joshua Thorne  
 Joshua & Amy Thorne  
 Marita Zaffiro

## Holiday gifts received in honour of

Irene Booker  
 Spencer Garel  
 Connor, Trevor & Samantha Goodes

Ryan & Isabella Hood  
 Bill & Lois Reynolds  
 Jex, Josh & Paige Tew  
 Patricia Timson

Karen Turner  
 Heidi Van Damme  
 Westmount Secondary School teachers

## Gifts in kind

Art Gallery of Hamilton  
 Boys and Girls Club of Hamilton  
 Christ's Church Cathedral  
 Connor, Clark & Lunn Private Capital  
 Core Collaborative Learning  
 Dr. Tom Deans  
 Elation Design Studio  
 Evans Sweeny Bordin LLP  
 Freeway Café  
 Hamilton Best Start Network  
 Hamilton Centre for Civic Inclusion  
 Hamilton Community Legal Clinic

Hamilton Public Library  
 The Hamilton Spectator  
 Hamilton-Wentworth District School Board  
 Immigrant Women's Centre  
 ImpactLink Capital  
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 Vijay Jos  
 KITESTRING  
 KPMG  
 Loyola House  
 Mohawk College  
 New Motto  
 Perkins Centre

Pier 8 Group  
 Riverdale Community Centre  
 Rodgers Investment Consulting  
 Katherine Roy  
 St. Giles Church  
 St. Helen's Catholic School  
 St. Peter's Church  
 Margaret Secord  
 Dr. Kristina Trim  
 Jodi Vanderheyden  
 Volunteer Hamilton  
 Dr. Doug Willms  
 Yale Properties

# The Hamilton Spectator Summer Camp Fund

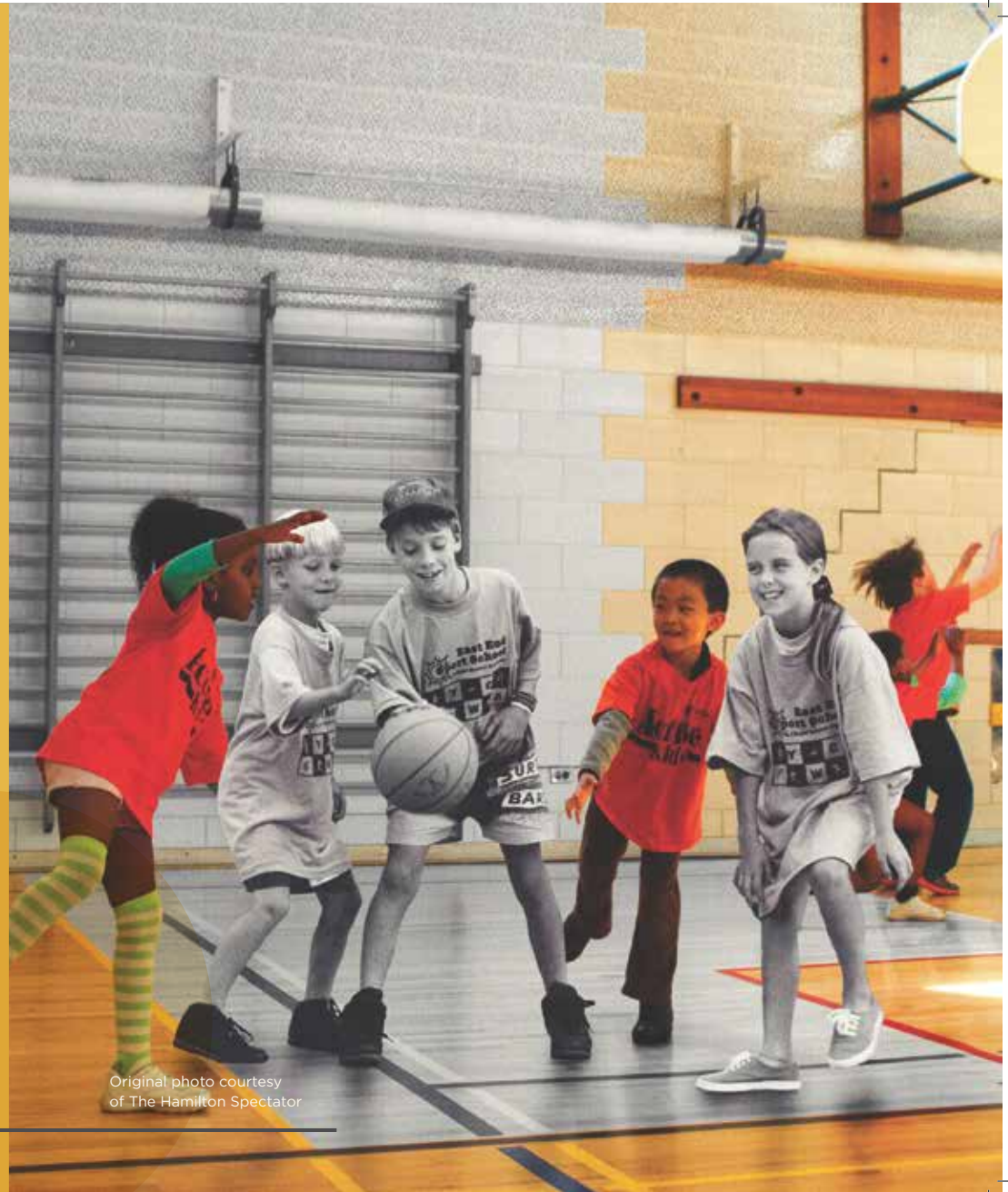
**1984 to 1993** One of the city's best-known charitable endeavours, The Hamilton Spectator Summer Camp Fund, came under the auspices of the Foundation in 1984.

While the camp fund dates back to 1898, "The Spec" joined forces with the Foundation in the 1980s to do what each could do best: the Foundation to use its financial and granting expertise to administer the fund; the newspaper to use its community reach to raise awareness and educate citizens about the benefits of camp.

Since that time, thousands of Hamilton children have had the opportunity to experience the joy of summer camp thanks to this fund, and thousands of Hamiltonians have experienced the pleasure of knowing their contribution makes it possible.

The Spectator Summer Camp Fund, established so many years ago, has had and continues to have a huge influence on child development in this community.

60  
years

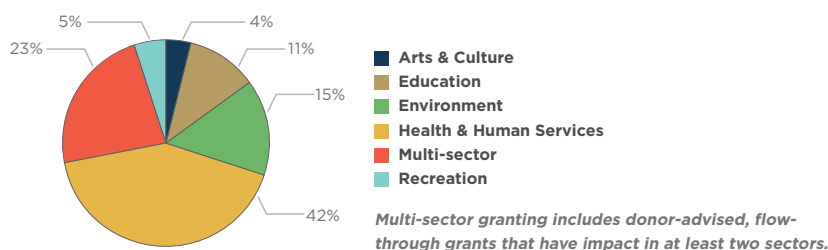


Original photo courtesy  
of The Hamilton Spectator



# Grants made in 2013-2014

Hamilton Community Foundation offers donors powerful opportunities to make a difference. We are unique in that we enable donors to grant to the widest possible range of charitable organizations and initiatives: arts and culture, health and human services, environment, recreation and education. Through prudent investment and sound financial practices, we ensure that donors' wishes are respected forever. Details about our grants and projects can be found at [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca)



## Grants from Community Fund

### Unrestricted Funds

City Kidz Ministry	1,000	Hamilton-Wentworth District School Board	2,000
Community Foundations of Canada	26,773	HCF: Hamilton Roundtable for Poverty Reduction	50,000
Compass Point Bible Church	5,000	HCF: Youth Advisory Council	15,000
Conserver Society of Hamilton & District, Inc./Green Venture	19,880	HCF: Youth-led Community Action Projects	12,000
Dr. Bob Kemp Hospice Endowment Fund	5,000	McMaster University	29,152
Elizabeth Fry Society	16,000	Mission Services of Hamilton	2,204
First Hamilton Christian Reformed Church (New Hope Church)	20,000	North End Neighbours	1,601
Hamilton Association for Residential & Recreational Redevelopment Programs	332	North Hamilton Community Health Centre	5,416
Hamilton East Kiwanis Boys' and Girls' Club	5,660	Robert Land Community Association	6,800
Hamilton-Wentworth Catholic Child Care Centres Inc.	36,000	Shalem Mental Health Network	13,928
		Social Planning & Research Council of Hamilton	293,695

Social Planning & Research Council of Hamilton*/Campaign for Adequate Welfare and Disability Social Action	4,560
The Hamilton Dream Centre	3,000
The John Howard Society	15,673
Welcome Inn Community Centre of Hamilton	5,953
Welcome Inn Community Centre of Hamilton*/Jamesville Hub	2,000
YMCA Hamilton*/Open Streets Hamilton	5,000
<b>TOTAL</b>	<b>603,627</b>

### Immediate Response Fund

Community Child Abuse Council of Canada	10,000
Elizabeth Fry Society	5,000
St. Joseph Immigrant Women's Centre	974
Wesley Urban Ministries	1,000
<b>TOTAL</b>	<b>16,974</b>

*In addition to these grants from the Community Fund, \$70,000 was paid this year for grants approved in prior years.*

## Grants from field-of-interest funds

### Ike & Shahnaz Ahmed Foundation Fund

Brock University	1,453
Mohawk College	1,400
University of Ottawa	3,500
Trent University	1,283
<b>TOTAL</b>	<b>7,636</b>

### The Alice Jean Ainsworth Memorial Fund

Centre 3 for Print and Media Arts	15,000
Hamilton East Kiwanis Boys' and Girls' Club	17,751
Hamilton Public Library	15,231
HCF: Hamilton Spectator Summer Camp Fund	7,398
North Hamilton Community Health Centre	4,860
<b>TOTAL</b>	<b>60,240</b>

### Nelson Allan Fund

Burlington Community Foundation	5,109
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### The Angel Fund\*

Hamilton Community Foundation	204
North Hamilton Community Health Centre	3,884
<b>TOTAL</b>	<b>4,088</b>

### Mary Lauder Cassidy Fund

Neighbour to Neighbour Centre (Hamilton)	3,975
St. Matthew's House	5,000
<b>TOTAL</b>	<b>8,975</b>

### Giovanni & Grazia Criminisi Literacy Fund\*

Elliott Heights Baptist Church	883
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Hamilton Community Foundation	94
<b>TOTAL</b>	<b>977</b>

### Delaware Fund

Hamilton East Kiwanis Boys' and Girls' Club	6,654
Mission Services of Hamilton	6,400
<b>TOTAL</b>	<b>13,054</b>

### Dougher Community Fund

Canadian National Institute for the Blind	4,000
City Housing Hamilton	7,200
Conserver Society of Hamilton & District, Inc./Urquhart Butterfly Garden	5,600
Dundas Central Public School Home & School Association	10,000
Dundas Historical Society Museum	5,000
Dundas Valley Orchestra	4,000
Dundas Valley School of Art	10,000
Dundas Youth Chaplaincy	17,294
Hamilton Conservation Foundation	15,000
Hamilton Council on Aging	9,000
Montessori Adolescent School of Hamilton	5,000
Ontario March of Dimes	5,000
St. Joseph's Villa Foundation	5,772
<b>TOTAL</b>	<b>102,866</b>

### Shirley M. Elford Gift of Today Fund

Wellwood Resource Centre of Hamilton	4,680
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### Russell I. Elman Fund

Collège Boréal	250
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\* These funds contribute to the Community Fund/Unrestricted funds  
 † Denotes lead partners for this grant

McMaster University	5,000
Neighbour to Neighbour Centre (Hamilton)	3,377
<b>TOTAL</b>	<b>8,627</b>

<b>First Place, Hamilton Tomorrow Fund</b>	
St. Joseph's Home Care	8,595
<b>Foxcroft Family Youth Fund</b>	
Fit Active Beautiful (FAB) Foundation	981
<b>Betty &amp; Jack George Family Fund</b>	
Living Rock Ministries	667
<b>Gibson Trust/Town of Flamborough</b>	
Hamilton Niagara Haldimand Brant Community Care Access Centre	1,205
<b>Edward &amp; Gladys Halloran Memorial Fund</b>	
Robert Land Community Association	13,200
Social Planning & Research Council of Hamilton	15,221
<b>TOTAL</b>	<b>28,421</b>

<b>Hambro Fund</b>	
Hamilton Public Library	1,559
<b>Barbara &amp; Bob Harwood Fund</b>	
Conservator Society of Hamilton & District, Inc./Green Venture	1,902
<b>Florence E.S. Hutton Fund</b>	
HCF: Hamilton Spectator Summer Camp Fund	12,586
<b>Arthur &amp; Helena Lemon Fund</b>	
Catholic Family Services of Hamilton	3,571
<b>Jane C. LeWarne Fund</b>	
Mission Services of Hamilton	608
<b>Antonina Lombardo Fund</b>	
Alzheimer Society of Hamilton and Halton	4,400
<b>Ray Lowes Environmental Fund</b>	
Hamilton Conservation Foundation	7,508
Hamilton Naturalists' Club	7,508
<b>TOTAL</b>	<b>15,016</b>

<b>Marchese Health Care 50th Anniversary Legacy Fund</b>	
Threshold School of Building	2,700
<b>George &amp; Shirley McBride Foundation Fund</b>	
Burlington Community Foundation	8,367
Habitat for Humanity Hamilton	10,000

Hamilton Association for Residential & Recreational Redevelopment Programs	19,668
<b>TOTAL</b>	<b>38,035</b>

<b>Note-Able Music Fund</b>	
Hamilton East Kiwanis Boys' and Girls' Club	1,095
<b>Pioneer Energy Fund*</b>	
Affiliated Services for Children & Youth (ASCY)	20,000
Children's Aid Society of Hamilton	5,000
Elliott Heights Baptist Church	15,333
<b>TOTAL</b>	<b>40,333</b>

<b>Royal Canadian Humane Association Fund</b>	
Royal Canadian Humane Association	2,550
<b>School Nourishment Fund</b>	
Social Planning & Research Council of Hamilton*/Tastebuds (formerly Partners in Nutrition)	80,000

<b>School Sisters of Notre Dame Legacy Fund</b>	
Good Shepherd Centres Hamilton*/Healthy Birth Weights Coalition	7,238
<b>Bill &amp; Tina Seale Fund</b>	
Living Rock Ministries	2,700
Rotary Club of Hamilton Sunshine Fund*/Wever Community Development Committee	2,700
<b>TOTAL</b>	<b>5,400</b>

<b>The Glenn &amp; Sidney Sellick Fund</b>	
Social Planning & Research Council of Hamilton	354

<b>Lillian M. Shaw Fund</b>	
Community Child Abuse Council of Canada	10,073
<b>W. Robert &amp; Marion S. Shivas Conservation Trust Fund</b>	
Halton Region Conservation Foundation	2,750
Hamilton Conservation Foundation	2,750
Hamilton Naturalists' Club	2,750
Royal Botanical Gardens	2,750
<b>TOTAL</b>	<b>11,000</b>

<b>Charles &amp; Ret Swire Fund</b>	
HCF: Hamilton Spectator Summer Camp Fund	5,355
<b>True Sport Fund</b>	
Fit Active Beautiful (FAB) Foundation	1,507

<b>Fund for Underprivileged Children</b>	
Community Foundation Grey Bruce	8,360
Hamilton East Kiwanis Boys' and Girls' Club	1,840
HCF: Hamilton Spectator Summer Camp Fund	9,463
Mission Services of Hamilton	6,400
<b>TOTAL</b>	<b>26,063</b>

<b>The Van Dusen Fund*</b>	
Burlington Community Foundation	2,182
Hamilton Community Foundation	779
Shalem Mental Health Network	12,472
<b>TOTAL</b>	<b>15,433</b>

<b>Joan C. Watt Memorial Fund</b>	
McMaster University	600
Threshold School of Building	1,261
<b>TOTAL</b>	<b>1,861</b>

<b>Women 4 Change Fund</b>	
Hamilton-Wentworth District School Board	10,000
<b>Kenneth Boothe Young &amp; Marie Catherine Young Fund</b>	
Centenary United Church	5,379
Hamilton's Centre for Civic Inclusion	15,000
McMaster University	17,593
Welcome Inn Community Centre of Hamilton	3,030
<b>TOTAL</b>	<b>41,002</b>

## Grants from donor-advised funds

<b>Ambery Fund</b>	<b>86,000</b>
<b>Hugh C. Arell Memorial Fund</b>	<b>300</b>
<b>Ella Baird &amp; Grace Baird McQueen Memorial Fund/A.J. McQueen</b>	<b>1,200</b>
<b>Board Leadership Fund</b>	<b>2,883</b>
<b>Bruce Trail Expedition for Kids Fund</b>	<b>26,500</b>
<b>W.L. Carpenter Memorial Fund*</b>	<b>121,668</b>
<b>Michael Chamberlain Fund</b>	<b>40,904</b>
<b>Clark Family Foundation Fund</b>	<b>44,000</b>
<b>Marlies &amp; Alan Clark Fund</b>	<b>59,000</b>
<b>Ellen Creaghan Fund</b>	<b>20,000</b>
<b>Farah Charitable Fund</b>	<b>4,000</b>
<b>Elham &amp; Joseph Farah Family Foundation Fund*</b>	<b>123</b>
<b>Fengate Community Foundation Fund*</b>	<b>31,285</b>
<b>The Gilmour Fund</b>	<b>15,000</b>
<b>Tara Lynn Giuliani Foundation Fund</b>	<b>7,308</b>
<b>Lillian &amp; Marvin Goldblatt Family Fund</b>	<b>7,000</b>
<b>Hamilton Spectator Summer Camp Fund</b>	<b>60,975</b>
<i>Grants to 21 organizations supporting 692 children to attend one week of camp.</i>	
<b>Heather &amp; Ross Hamlin Fund*</b>	<b>622,000</b>
<b>Heels Family Vocal Award Fund*</b>	<b>2,226</b>
<b>Mildred Dixon Holmes - Youth Orchestra Fund</b>	<b>9,271</b>

<b>The Hogarth Family Foundation Fund</b>	<b>60,000</b>
<b>Hutton Family Fund*</b>	<b>3,452</b>
<b>Kirkpatrick Fund</b>	<b>1,800</b>
<b>Lawyers' Legacy for Children</b>	<b>1,000</b>
<b>Losani Family Foundation Fund</b>	<b>110,775</b>
<b>John &amp; Esther Marshall Memorial Fund</b>	<b>8,190</b>
<b>The Martin Foundation Fund</b>	
Art Gallery of Hamilton	2,000
Bach Elgar Choir	2,000
Chamber Music Hamilton	2,000
Christ's Church Cathedral	2,000
CNIB Ontario	2,000
Dundas Valley School of Art	2,586
Elizabeth Fry Society	5,000
Good Shepherd Centres Hamilton	4,000
Hamilton Conservation Foundation	6,000
Hamilton Council on Aging	2,645
Hamilton East Kiwanis Boys' and Girls' Club	2,000
Hamilton Music Collective	2,000
Hamilton-Wentworth District School Board	1,269
HCF: Hamilton Spectator Summer Camp Fund	2,000

Interval House of Hamilton	2,000
March of Dimes Canada	
Non-Profit Housing Corporation	2,000
St. Matthew's House	2,000
The John Laing Singers	2,000
<b>TOTAL</b>	<b>45,500</b>

**Mayberry Family Fund 6,976**

**McCallum, McBride Fund**

Ancaster Community Services & Information	500
Canadian Mental Health Association	500
Eagles Nest Association of Waterdown	250
Elizabeth Fry Society	1,000
Hamilton & District Extend-a-Family	500
Hamilton Naturalists' Club	5,000
Hamilton-Wentworth District School Board <sup>†</sup> /Mountain Secondary School	1,000
Living Rock Ministries	1,250
Mission Services of Hamilton	1,500
Native Women's Centre	1,000
Neighbour to Neighbour Centre (Hamilton)	3,000
Niwasa Head Start Preschool	1,000
Rotary Club of Hamilton Sunshine Fund <sup>†</sup> /Wever Community Development Committee	2,000
St. Matthew's House	1,500
The Hamilton Dream Centre	1,500
Urban Native Homes	1,000
Welcome Inn Community Centre of Hamilton	1,000
Wesley Urban Ministries	2,000
<b>TOTAL</b>	<b>25,500</b>

**Carolyn & Paul Milne Fund 1,500**

**Mark & Barbara Nimigan Fund 3,250**

**Payne Fund 15,000**

**Pioneer Energy Foundation 358,500**

**Ed Smee Conserver Society Environmental Fund 4,000**

**Glen & Debra Swire Fund 1,508**

**Thorne Family Fund 2,000**

**Tran Family Fund\* 90**

**Karen & Peter Turkstra Family Foundation Fund 35,000**

**Edith H. Turner Foundation Fund**

Conserver Society of Hamilton & District, Inc. <sup>†</sup> /Green Venture	5,000
Conserver Society of Hamilton & District, Inc. <sup>†</sup> /Hamilton Conservation Foundation	5,000
Culture for Kids in the Arts	15,000
Dundas Valley School of Art	5,000
Elliott Heights Baptist Church	4,667
Fit Active Beautiful (FAB) Foundation	7,353
Flamborough Information & Community Services	5,500
Good Shepherd Centres Hamilton <sup>†</sup> /Healthy Birth Weights Coalition	2,762
Good Shepherd Centres Hamilton <sup>†</sup> /Liberty for Youth	5,000
Hamilton Naturalists' Club	9,400
Hamilton Philharmonic Orchestra (2000) Inc.	5,000
Hamilton-Wentworth District School Board <sup>†</sup> /Cardinal Heights	2,000
Hamilton-Wentworth District School Board <sup>†</sup> /Catholic Family Services of Hamilton	6,429
Hamilton-Wentworth District School Board <sup>†</sup> /Mountain Secondary School	6,000
Hamilton-Wentworth District School Board <sup>†</sup> /Neighbour to Neighbour Centre (Hamilton)	6,623
Living Rock Ministries	29,333
Lynwood Hall Child and Family Centre	5,000
Mission Services of Hamilton	6,500
Native Women's Centre	20,000
Neighbour to Neighbour Centre (Hamilton)	1,025
North Hamilton Community Health Centre	6,000
Rotary Club of Hamilton Sunshine Fund <sup>†</sup> /Wever Community Development Committee	5,000
Rotary Club of Hamilton Sunshine Fund <sup>†</sup> /YMCA of Hamilton/Burlington/Brantford	20,000
Royal Conservatory of Music	15,000
Social Planning & Research Council of Hamilton <sup>†</sup> /Art Forms	10,000
Social Planning & Research Council of Hamilton <sup>†</sup> /Breakfast Club of Canada	10,000
St. Joseph Immigrant Women's Centre	15,000
Start2Finish	5,000

Student Open Circles	10,000
The Easter Seals Ontario	5,000
The John Howard Society	9,855
Threshold School of Building	31,039
Welcome Inn Community Centre of Hamilton	15,000
Wellwood Resource Centre of Hamilton	5,000

Wesley Urban Ministries	11,434
YWCA Hamilton	10,000
<b>TOTAL</b>	<b>335,920</b>
<b>Williams Family Fund*</b>	<b>2,250</b>
<b>The Young Fund*</b>	<b>1,272,919</b>
<i>In addition to these grants, \$100,000 was paid this year for grants approved in prior years.</i>	
<b>Anonymous</b>	<b>139,741</b>

**Grants from scholarship and bursary funds**

General Bursary Fund/Genevieve A. Chaney & Cordelia C. Ensign	19,000	Russell & Elizabeth Lindley Fund	5,370
CPRS Hamilton Legacy Fund	1,000	Music Bursary Fund	2,350
James Darby Bursary Fund	3,200	Rundle Foreign Study Bursary	2,500
Jeff Dickins Memorial Fund	1,000	United Nations Association, Hamilton & District Bursary Fund	12,677
Eugene B. Eastburn Fellowship Fund	80,000	John E. VanDuzer Scholarship Fund	2,000
Geritol Follies Bursary Fund	3,000	Albert & Betty Walters Fund	1,900
Christina Hamilton Scholarship Fund	932	Jervis B. Webb Company of Canada Scholarship Fund	6,000
William Allison Haynes Fund	742	Ross F. Webb Bursary Fund	2,258
Lee Hepner Award Fund	1,500		
Mildred Dixon Holmes - Artist of the Year Fund	2,000		

**Grants from designated funds**

<b>Douglas J. Clark Fund*</b>	<b>4,107</b>	<b>Samaritans' Tithe Fund</b>	<b>8,632</b>
<b>Walter &amp; Mildred Danby Fund*</b>	<b>15,595</b>	<b>Stoney Creek Health Fund/Dr. Bob &amp; Mildred Kemp</b>	<b>27,109</b>
<b>Frank Charles Miller Fund*</b>	<b>1,138,220</b>	<b>United Way Fund/Kenneth R. Walsh</b>	<b>7,450</b>
<b>Phenix Fund for Animal Welfare</b>	<b>3,532</b>	<b>Anonymous</b>	<b>153,634</b>
<b>James P. &amp; Mary S. Phin Charitable Fund</b>	<b>7,134</b>		
<b>PHOG Endowment Fund</b>	<b>10,416</b>		

**Total grants and community leadership**

Total grants approved	6,336,135	The Promise Education Strategy Research	21,164
Adjustment for deferred grants	(219,137)	Youth in Philanthropy Program	16,794
<b>TOTAL GRANTS PAID</b>	<b>6,116,998</b>	Neighbourhood Action Strategy Evaluation (formerly Tackling Poverty Together)	10,290
<b>Community leadership projects</b>		Other leadership projects	15,600
Hamilton Roundtable for Poverty Reduction	232,630	<b>Total community leadership projects</b>	<b>338,957</b>
Neighbourhood Leadership Institute	42,479	<b>TOTAL</b>	<b>6,455,955</b>

# *A Focus on Neighbourhoods*

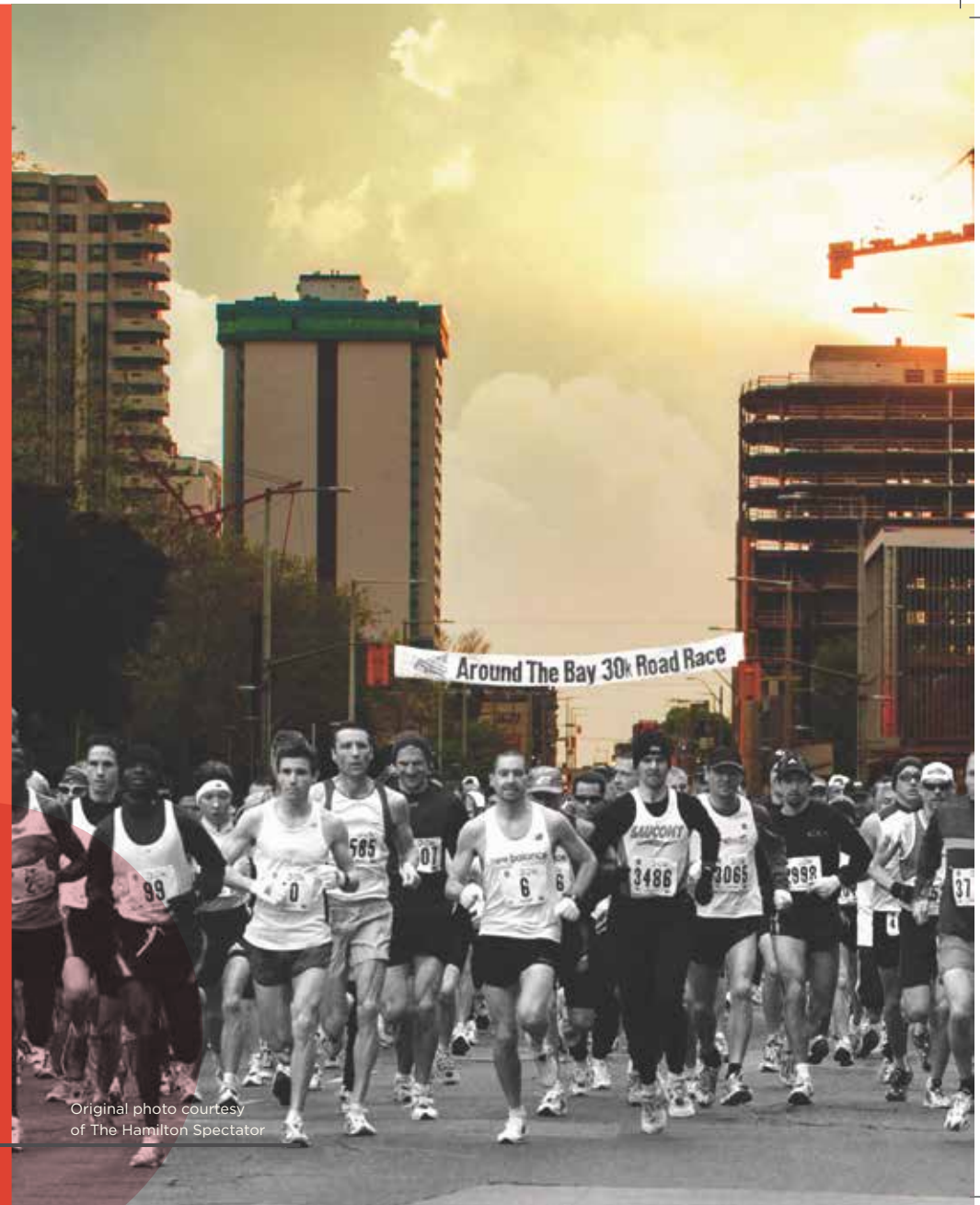
**1994 to 2003** For HCF, this was the decade that launched strategic philanthropy, as we moved toward proactive, planned, focused use of our burgeoning resources. The generous Young family gift prompted us to reach out in a broad community consultation and best practices review to determine the most useful way to play the community foundation's unique position.

The findings clearly demonstrated that neighbourhoods were the key to developing Hamilton's strengths and vitality. We launched the Growing Roots...Strengthening Neighbourhoods initiative in 2002 and have proven the power of small grants and leadership development to help the city's most challenged neighbourhoods identify and build on their assets.

Working side-by-side with residents—the people who best know a neighbourhood and its needs—this approach uncovered safer, beautified, welcoming communities and nurtured local leaders.

The lessons we learned in the process informed our direction in the coming decade.

60  
years



Original photo courtesy  
of The Hamilton Spectator

# Financial highlights

The financial results for the year ended March 31, 2014 are outstanding and a wonderful start to Hamilton Community Foundation's 60<sup>th</sup> Anniversary.

Thanks to the generosity of our donors, we received donations of \$6.6 million and annual granting is the largest in our history. Financial markets provided an annual 17.7% return, with the 10-year return close to 7%. These strong returns have allowed HCF to top up our reserve which enables us to continue to grant and maintain operating capacity when the market is weak. We continue to be pleased with the progress on diversifying our investments through alternative investment strategies, including "impact investment" commitments which align more of our assets with our mission. Following are financial highlights and key historical trends. In keeping with our commitment to financial accountability and transparency, full audited financial statements are available at [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca) or by mail. You may also access the HCF T3010 tax return information via [www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html](http://www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html)

(\$000's)	2014	2013	2012
Total assets	155,844	137,014	124,964
Investments at market*	153,366	135,935	124,074
Investment returns			
One year	17.7%	10.9%	2.7%
Five years	12.1%	4.6%	1.6%
Ten years	6.7%	6.5%	4.1%
Funds balance			
Endowed funds	118,062	111,957	108,514
Restricted funds	28,374	15,914	8,751
Operating funds	52	90	149
Total HCF funds balance	146,489	127,961	117,414
Funds held on behalf of other parties	8,315	7,392	6,676
Donations received	6,557	5,906	4,797
Grants and community leadership	6,456	5,155	5,393
Operating expenses	2,149	2,037	2,088
As a % of average total assets	1.5%	1.6%	1.7%

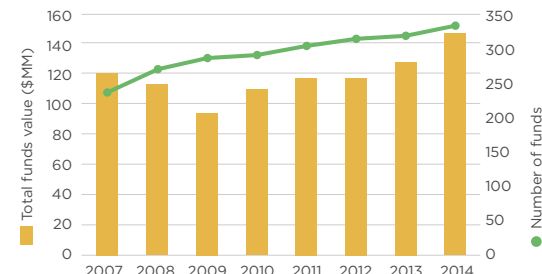
\*In addition, HCF assets at March 31, 2014 include alternative investments recorded at cost totalling \$1,655,000.

## Total Assets

Hamilton Community Foundation's total assets of \$155.8 million at March 31, 2014 include HCF funds balance and funds held on behalf of third parties at \$8.3 million.

## HCF Funds Balance

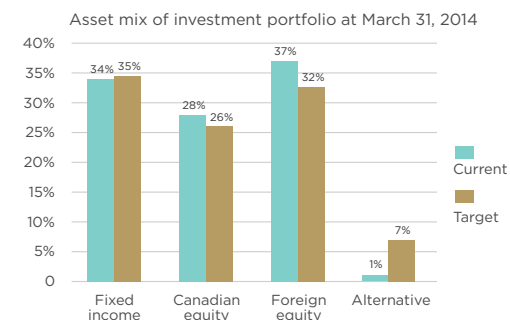
Hamilton Community Foundation's funds balance represents accumulated donations plus the net investment earnings on these donations, less granting and operating costs. Funds include both endowed and flowthrough funds. Endowed funds are held permanently, granting from investment earnings. Flowthrough funds are fully distributed as grants over a pre-determined term.



The funds balance has grown 22% from \$119.7 million in 2007 to \$146.5 million at year ended March 31, 2014. The funds balance eroded in 2008 and 2009 when donations did not offset the impact of worldwide investment market declines. Increased donations and very strong investment returns for 2014 supported an annual 15% funds growth. The number of funds at 333 has increased 42% from 235 in 2007.

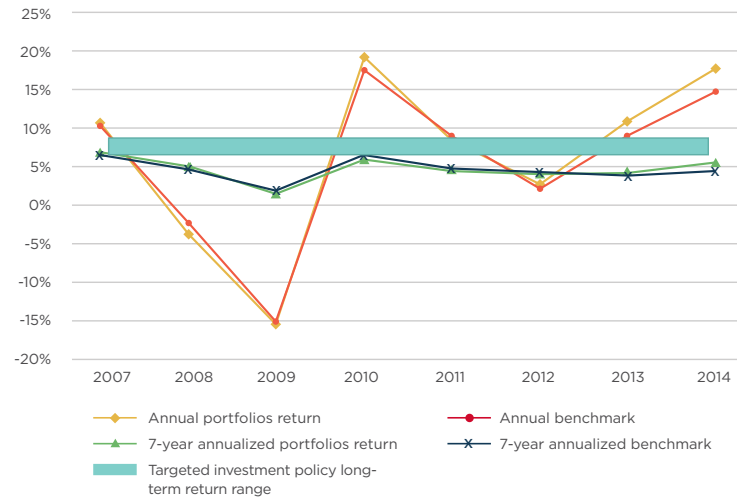
## Investments

Investments which are traded in active markets are reported at their fair market value. Investments not actively traded are recorded at their cost less any impairment of their value. In a continuing effort to provide a more diverse and robust portfolio, HCF has committed to investing in alternative asset classes including real estate, private equity and infrastructure. These alternatives are consistent with the Foundation's long-term investment horizon and liquidity requirements. As these investments are not actively traded, they are valued at cost on the financial statements. Portfolios are invested according to investment policy guidelines established by HCF's Board of Directors. HCF's portfolios are managed by three professional investment managers in accordance with the policy and overseen by the Board's Finance and Investment Committee. This committee reviews the investment managers' reports quarterly to assess each manager's performance. In addition, the committee meets with the investment managers semi-annually to complete a formal evaluation. The investment policy sets out a target asset mix as well as a range around these targets. The managers use their discretion to invest the portfolios within this range. The following reflects the current and target asset mix. For the alternative investments, 'target' is the amount committed to this asset class; 'current' is the amount actually invested at year end.





## Investment returns



This graph compares:

- HCF's portfolios return for publicly traded securities for each year against the annual investment policy benchmark for that year.
- HCF's seven-year annualized return against the seven-year annualized investment policy benchmark.
- Both of these against the targeted investment policy long-term range.

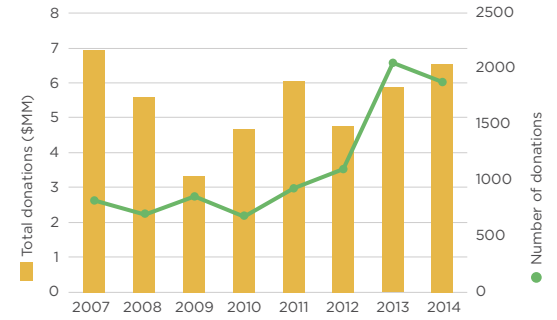
Benchmarks reflect the performance of each market index based on HCF's specific target asset mix. Comparing actual results to the benchmark measures the value added by investment managers compared to the average market performance. HCF's investment policy is targeted at achieving a long-term investment return in the 7% to 9% range.

As illustrated, investment returns over the past seven years have been extremely volatile. Investment returns were very strong in 2014 with a 17.7% return compared to a 14.6% investment policy benchmark for the year. The seven-year annualized return, although below target, reflects a much lower volatility. As noted in the financial highlights, the current 10-year annualized return of 6.7% is nominally less than the lower end of the target range and reflects the challenging market conditions over the past decade. The five-year return at 12.1% has increased 7.5% from last year due to the weak 2009 results at -15.2% being replaced by the very strong 2014 results in the five-year average.

## Donations

Donations to the Foundation are from individuals, corporations and other charitable organizations. Donors may contribute to named endowment or flowthrough funds or to the Board-directed Community Fund.

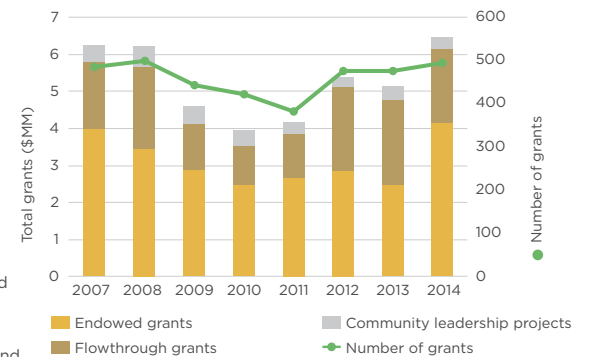
Total annual donations have ranged from \$3.4 million to \$7.0 million over the past eight years. Although fewer donations (1,895) were received in 2014 than in the previous year, this number continues to be significantly higher than it has been traditionally. The number of donations changes based on the number and nature of donor-sponsored events to raise money for their funds as well as on the level of in memoriam gift activity.



## Grants

Grants are made annually from both endowed and flowthrough funds. As flowthrough fund balances are granted in a shorter time period, granting from these funds can materially influence the total amount granted.

This year's granting at \$6.1 million represents the largest amount of financial support provided by HCF in its history. Grants and the cost of community leadership projects has ranged from \$4 million to \$6.5 million annually over the last eight years. Granting from endowment funds was reduced in 2009 and 2010 as a result of the decline in investment returns which a) lowered the asset base used for the granting calculation (currently 3.5% of the fund balances), and b) resulted in less income available to grant. Over the past three years, flowthrough granting has grown to more than 40% of total granting compared to approximately 30% on average over the previous five years.

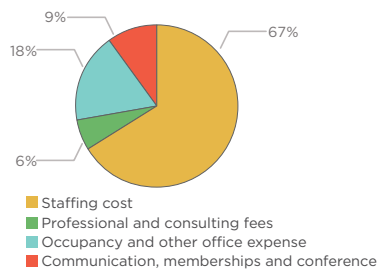


## Operations

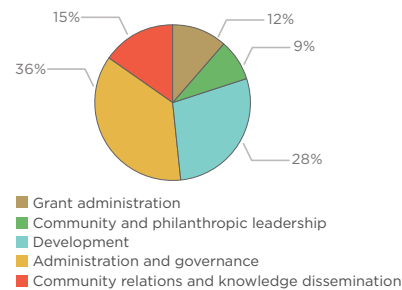
Operating expenses for the fiscal year ended March 31, 2014 total \$2.1 million, an increase of 5%. This increase reflects the costs of bi-annual professional development travel, initial costs supporting HCF's 60<sup>th</sup> anniversary, rebranding and website redesign. The Foundation has a staff of 17 under the direction of the President & CEO, who reports to an independent board of directors. Staffing costs represent 67% of HCF operating costs.

In addition to breaking out cost by type, operating costs are allocated to each of the Foundation's operating areas: granting, community and philanthropic leadership, community relations and knowledge dissemination, asset development, and administration and governance. Examples of community and philanthropic leadership include convening around the city's critical issues as described on page 18 of this report. It also includes fostering the growth of philanthropy by supporting other charities through sharing staff time and knowledge. Leadership costs include time and facility contribution to the Hamilton Roundtable for Poverty Reduction.

Fiscal operating expenses by category

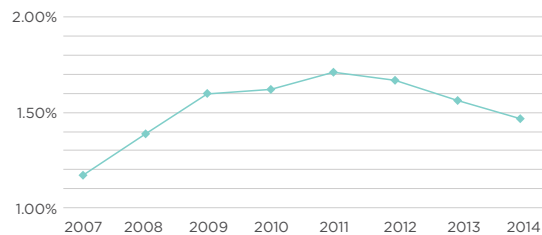


Fiscal operating expenses by operating area



The Foundation's annual development expenses are not necessarily attributable to the donations received in that year. The nature of donations to the Foundation can result in costs preceding the receipt of the donation by several years (for example, donations through wills). As a result, consistent with the community foundation sector, operating costs are evaluated by a ratio of total operating expenses to average total assets. Ratios fall within a range depending on the size and stage of the community foundation's development.

Management considers the ratio of 1.5% (1.6% in 2013) to be within an acceptable range compared with benchmarks established in the community foundation sector. We continue to monitor both the actual results and the benchmarks on an ongoing basis.



## Impact investing update

Hamilton Community Foundation continues to put more of our assets to work for social as well as financial return. By setting aside a portion of our endowment for impact investing, we can significantly multiply the Foundation's positive effect on our own and other communities while supporting sustainable and socially relevant investments aligned with our mission.

Locally, the Hamilton Community Investment Fund offers loans that work alongside granting for impact and "recycles" capital for charitable use. This year HCF has supported:

- Operations of Hamilton's first grocery co-operative
- Purchasing land for a greenhouse that will support a variety of healthy food programs
- Increasing the fundraising capacity of a local artist-run centre

Potential future projects include affordable housing development and land/building acquisition for a local charity's multipurpose facility.

The balance of our impact investing portfolio is seeded by the Young Fund, and includes \$30 million invested in public market securities where environmental, social and governance (ESG) practices are an important investment consideration. It also includes direct investments in funds and organizations that seek social and

financial returns where, this year, commitments have been made to three organizations:

- **Renewal 3**, a social venture fund investing in early growth stage businesses in the organic and natural food, green products and environmental and social innovation sector in Canada and the U.S.
- **Mercer Private Investment Partners III-Sustainable Opportunities**, a global portfolio of highly rated private market funds that provides investments expected to benefit from the global shift towards a lower carbon economy and the need to address resource scarcity issues.
- **Trillium Housing Trust**, established to help low-to-modest income Canadian families gain homeownership by developing affordable housing.

Together with prior commitments to Sarona Frontier Markets, Resilient Capital and Greenchip Global Equity, these commitments total \$5.8 million of the \$7.0 earmarked for direct impact investment.

Source	Impact Investment	Amount
The Young Fund	<b>ESG Public Market</b>   Public market investments using investees' environmental, social and governance practices as important investment considerations. Managed by Guardian Capital	\$30 million
	<b>Direct impact</b>   Investment in funds and organizations made intentionally to produce both positive social and/or environmental returns while also seeking financial return	\$7 million
Community Fund	<b>The Hamilton Community Investment Fund</b>   Invests in and provides loans to Hamilton charities, not for profits and social enterprises. Our partner is the Community Forward Fund, a Canadian non-profit specializing in financing for non-profits and charities	\$5 million
<b>Total impact investing portfolio</b>		<b>\$42 million</b>

# Turning Knowledge into Strategic Action

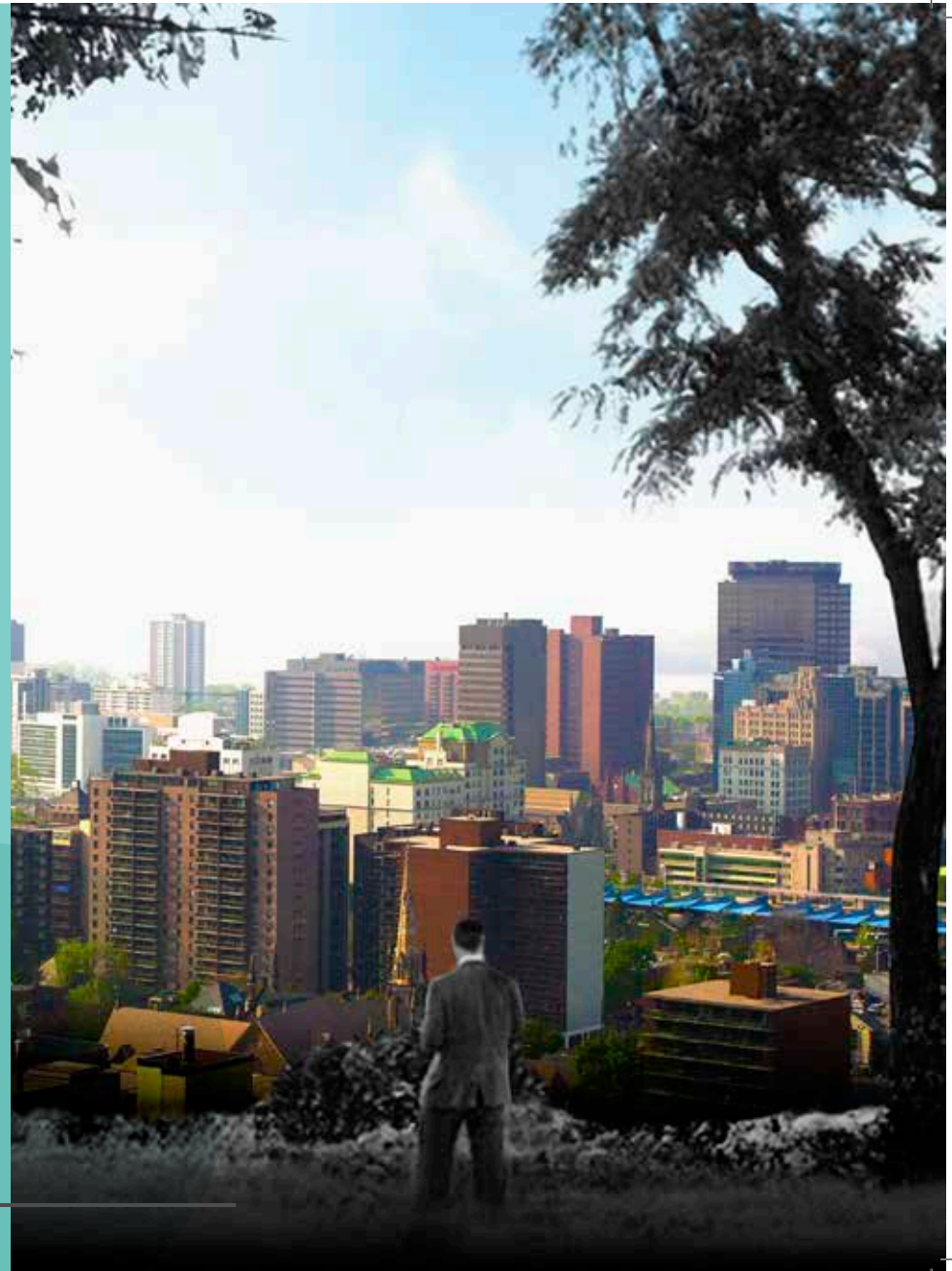
**2004 to today** It was in this decade that all the Foundation's research and experience pointed to one pervasive barrier to Hamilton's vitality: poverty. HCF's board decided to tackle this complex, long-term problem head-on, focusing the bulk of its discretionary granting on this single issue. It was a bold approach, unheard of in the community foundation world at the time.

Since that time, the Foundation has invested some \$10 million into reducing and preventing poverty through strategic grantmaking and community leadership. We established the Hamilton Roundtable for Poverty Reduction to address policy-level changes while stressing the pivotal role of neighbourhoods in strengthening the city—an approach since adopted by the City of Hamilton.

As we look back and look ahead on this 60<sup>th</sup> Anniversary, we remain committed to addressing Hamilton's toughest challenges, ever mindful that the gifts entrusted to us over six decades are a powerful force for good.

Based on research, community knowledge, best practices in philanthropy—and Hamiltonians' deep love for their city—we will continue to steer a course that puts those resources to work for Hamilton's vitality.

60  
years



# Board members, volunteers and staff

## Board Advisory Committees 2013–2014

Hamilton Community Foundation's work is supported by both standing committees of the Board of Directors and board advisory committees. Membership of the board advisory committees includes both board members and a wide range of community volunteers whose expertise we rely on and appreciate. Standing committees of the board include: Governance and Board Effectiveness, Development, Finance and Investment, and the Impact Investment Advisory Committee.

### Audit Committee

Mario Frankovich, MBA, CFA, *Chair*  
Cameron J. Beatty, CPA, CA  
Steve Borsellino, CMA  
Brent Foreman  
Paul Lee-Chin

### Chaney-Ensign Bursary Fund

Sandra Stephenson, *Chair*  
Terry Costello  
Jill Davren  
Myrna Kelly  
Dr. John Misale  
Nancy Rundle

### Community Fund

Jeremy Freiburger, *Chair*  
Dr. Jane Aronson  
Suzanne Brown  
Angela Dawe  
Treena Ley  
Tom Marlor  
Teresa Smith  
Marita Zaffiro

### Community Health, Education and Research Fund

Dr. Jane Aronson, *Chair*  
Paul Armstrong  
Marion Emo  
Dr. Gianni Parise  
Dr. Jenny Ploeg  
Dr. Leila Ryan

### Advisory Committee on Diversity and Inclusion

Dr. Jane Aronson, *Chair*  
Matthew Green  
Anju Joshi  
Milé Komlen  
Dr. Carolyn Rosenthal  
Dr. Gary Warner

### Edith H. Turner Foundation Fund

Renate Davidson, *Chair*  
Dorothy Bartalos  
Timothy Bullock  
Sondra Cornett  
Terry Horne, *Honourary Member*

### Geritol Follies Performing Arts Bursary Fund

Kathy Brown, *Chair*  
Jeanne Scott\*  
John Simpson  
\*deceased April 2014

### Hamilton Spectator Summer Camp Fund

Jane Allison

### McCallum, McBride Fund Advisory Committee

John McCallum, *Chair*  
Kevin Beattie  
Carole Capling  
Linda Hughes  
Debbie-Ann Rashford

### Nominating Committee

Dr. Gary Warner, *HCF Past Chair/Committee Chair*  
Mayor Bob Bratina, *City of Hamilton*  
Police Chief Glenn De Caire, *Hamilton Police Service*  
Dana Robbins, *Chair, United Way of Burlington & Greater Hamilton*  
Louise Dompierre, *Chair, Hamilton Chamber of Commerce*  
Michelle Stark, *President, Hamilton Law Association*  
Paul Gibel, *Board Chair, Hamilton Community Foundation*

### Ontario Endowment for Children & Youth in Recreation

Matthew Green\*, *Chair*  
Cecelia Carter-Smith  
Nicki Glowacki

Katherine Houston  
Greg Maychak  
Evelyn Myrie  
Kelly Scott  
\* *resigned during the year*

### United Nations Bursary Award Fund

Brian Reid, *Chair*  
Gail Rappolt

### Women 4 Change Founders Advisory Committee

Beth Webel, *Chair*  
Annette Aquin  
Lisa Dalia  
Renate Davidson  
Lori Dessau Tauber  
Susan Goodman

Kathryn Lakin  
Sheree Meredith  
Sandy Schwenger  
Sandra Stephenson

### Youth Advisory Council

Stephanie Bertolo, *Co-Chair*  
Ashley Yu, *Co-Chair*  
Nora Abdalaal  
Batoul Al-waadh  
Amna Ali  
Muhammad Ali  
Zoé Haskell-Craig  
Rakhshan Kamran  
Heather McBrien  
Salma Mobasher  
Hira Nadeem  
Sachin Patel

Kishan Patel  
Olivia Prunean  
Shahbano Syed  
Hannah Tobias-Murray  
Arjuna Yusuf  
Becky Schmor, *Co-Chair\**  
Justine Williams, *Co-Chair\**  
Samna Aziz\*  
Tony Borsellino\*  
Mark Bursey\*  
Elliot Davis\*  
Nida Mahmood\*  
Haman Mamdouh\*  
Nadia Nadeem\*  
Austin Strutt\*  
\* *completed term June 2013*

## Board of Directors 2013–2014

**Paul Gibel**, FCPA, FCA  
Partner, Grant Thornton  
*Board Chair*

**Dr. Gary Warner**, CM  
Former Director, Arts & Science Program, McMaster University  
*Past Chair*

**Marita Zaffiro**, BScPhm, MBA  
President & CEO, Marchese Health Care  
*Treasurer*

**Dr. Jane Aronson**  
Director, School of Social Work, McMaster University

**Dr. Justin Cooper**  
President Emeritus, Redeemer University College

**Tyler Cowie**  
CEO/Creative Director, factor[e] design initiative

**Dr. Patrick Deane**  
President & Vice Chancellor, McMaster University

**Brent J. Foreman**, BA, LL.B  
Partner, SimpsonWigle LAW LLP

**Jeremy Freiburger**  
Chief Connector & Cultural Strategist, CoBALT CONNECTS

**Anju Joshi**  
Associate (Teaching) Professor, Department of Health, Aging & Society, McMaster University

**Stephen Kulakowski**  
Partner, Core Urban Inc.

**Paul Lee-Chin**  
Investment Advisor and Branch Owner, Mandeville Private Client Inc.

**Ruth Liebersbach**, BA, FCMA, C.DRI  
Chief Financial Officer, McMaster Innovation Park

**Tom Marlor**  
Deputy Chief of Police, Hamilton Police Service (retired)

**Teresa Smith**  
President, Hamilton General Hospital

**Beth Webel**, MBA, CPA  
Tax Partner, PwC

**Matthew Green\***  
President & CEO, Integrated Active Living Inc.  
\*resigned from board Oct. 2013

**Stephanie Bertolo Ashley Yu**  
Co-Chairs, Youth Advisory Council (ex-officio, non-voting positions)

**Terry Cooke**  
President & CEO  
*Secretary of the Board*

## Volunteers 2013-2014

The Foundation is grateful to these dedicated volunteers and professionals who made a special contribution by assisting the Board and staff with special projects:

Patricia Amos  
Cameron J. Beatty, CPA, CA  
Ian Bird  
John & Sandra Black  
Steve Borsellino, CMA  
Alan Broadbent  
Suzanne Brown  
Dr. Jean Chamberlain  
Alan & Marlies Clark  
Hugh Clark  
Dr. Tom Deans

David Derbyshire  
Mary Lou Dingle  
Dr. Jim Dunn  
Mario Frankovich  
Murray Hogarth  
HRPR Roundtable and Working Groups  
Paul Johnson  
Dr. John Malloy  
Judith McCulloch  
Carolyn Milne

Sarah Murphy  
Marnie Paikin  
Steve Paikin  
Dr. Leila Ryan  
Nancy Rundle  
Glen Swire  
Dr. Brian Underdown  
Dr. Gary Warner  
Gwyn Williams  
Terry Yates, FCA  
Bill Young, Jr.

## Hamilton Community Foundation Staff

**Terry Cooke**  
President & CEO

**Annette Aquin, CPA, CA**  
Executive Vice-President,  
Finance & Operations

**Grace Diffey, APR, FCPRS**  
Vice-President, Community  
Relations

**Matt Goodman**  
Vice-President, Grants &  
Community Initiatives

**Sheree Meredith**  
Vice-President, Philanthropic  
Services

**Jill Anderson**  
Director, Development

**Helen Callaway**  
Co-ordinator, Donor Services

**Sharon Charters**  
Manager, Grants

**Margaret Freeborn, CGA**  
Manager, Accounting &  
Information Technology

**Morag Halsey**  
Receptionist/Foundation  
Support Assistant

**Tami Henderson**  
Administrative Assistant, Grants

**Pamela Lakin, CPA, CA**  
Director, Donor Services

**Angel Li**  
Junior Accountant

**Anne Lupkoski, CAP-OM**  
Corporate Secretary & Executive  
Assistant

**Investment Counsellors**  
Connor, Clark & Lunn  
Private Capital Ltd.  
Guardian Capital  
Jarislowsky Fraser Limited

**Melissa Ricci**  
Adult Advisor, Youth Advisory  
Council

**Rose Taylor-Weale**  
Administrative Assistant,  
Executive Office & Development

**Tracy Varcoe**  
Administrative Assistant,  
Finance & Community Relations/  
Webmaster

**Hamilton Roundtable for  
Poverty Reduction:**

Tom Cooper  
Director

Jennifer Chivers  
Administrative Co-ordinator

Celeste Licorish  
Co-ordinator, Speakers Bureau

**Bankers & Custodian**  
Bank of Montreal and  
BMO Harris Private Banking

**Auditors**  
BDO Canada LLP  
**Solicitor**  
Evans Sweeney Bordin LLP

## Our 60th Anniversary Sponsor—Pioneer Energy LP

**A commitment to value beyond the pumps.**

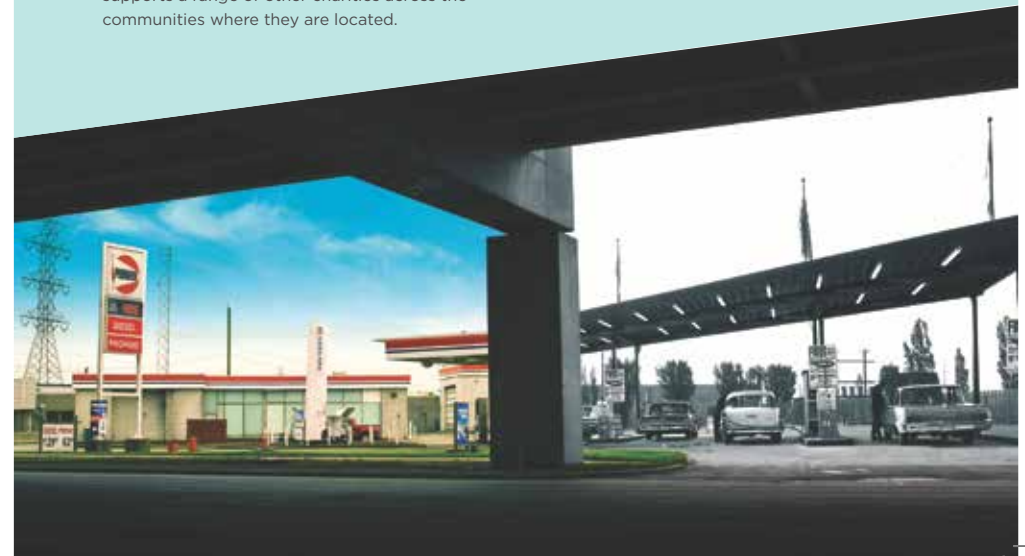
For close to 60 years, one of Hamilton's outstanding corporate partners has been Pioneer Energy LP, founded by Murray Hogarth.

The homegrown company started in 1956 with one gas station on Upper James St. It's now a multi-billion dollar corporation with gas/convenience retail locations across Ontario, Manitoba and into Atlantic Canada—and it fosters a stellar commitment to giving back.

In 1999, Pioneer marked the millennium by establishing the Pioneer Energy Foundation at HCF and has since granted close to \$4 million focused on the needs of children and young adults. The company also created the Pioneer Petroleum Foundation Fund within HCF's Community Fund to help deal with Hamilton's most pressing needs. Pioneer also generously supports a range of other charities across the communities where they are located.

Pioneer paves the way for others to make a difference through community philanthropy. Programs at their retail outlets like *Cent a Litre Days*, *Give What You Can*, and *School Bucks Community Bucks* encourage customers and partners to join them in meeting local needs.

It's hard to overestimate the value of Pioneer's commitment to Hamilton and the other cities where the company does business. We thank them for their anniversary sponsorship, but even more for decades of support to our community—past and future





## Contact Us

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