



NOW  
**PICTURE**  
THIS

**2016** HAMILTON COMMUNITY FOUNDATION  
**ANNUAL REPORT**





## NOW **PICTURE** THIS

Creating positive change is an art. Our donors and partners share in the vision to improve the social landscape of our city, and that's the idea behind the theme of this year's annual report, NOW PICTURE THIS.

This year we're presenting five stories in a way unlike any before. We know that the progress made through our donors' generosity and our partners' frontline work can't be fully captured in a photograph. So we've given five Hamilton artists free creative rein to depict these stories in their distinctive visual styles and, in doing so, to inspire us all to see the bigger picture.

We are thrilled to share with you the results of their inspiration in the following pages. To learn more about the artists and their work, please visit [hamiltoncommunityfoundation.ca/nowpicturethis](https://hamiltoncommunityfoundation.ca/nowpicturethis)

## OUR VISION

A vibrant, inclusive Hamilton

## OUR MISSION

To drive positive change by connecting people, ideas and resources

**HAMILTON**  
**COMMUNITY**  
**FOUNDATION**

# MESSAGE FROM THE BOARD CHAIR AND THE PRESIDENT & CEO

Picture an organization that acts as a catalyst to bring individuals and resources together to build a vibrant and caring Hamilton. Picture Hamilton Community Foundation.

This annual report features the creations of local artists, inspired by stories of the Foundation's work over the last year. We hope as you read this report that you, too, will be inspired both by HCF's impact and reach and by those who have chosen the Foundation to help them make a difference through philanthropy.

This has been a remarkable year for HCF, with record high granting of \$7.9 million and the culmination of key initiatives that position us well to address our community's critical issues. This year, our Board also made the decision to increase our impact investment allocation to 20 percent of HCF's assets by 2020. Beyond putting more of our resources to work for good, we also believe it will spark new relationships that can benefit Hamilton.

We launched ABACUS, an initiative to improve both the trajectory of young lives and the prosperity of our city through access to education. It's both our signature leadership undertaking and a strategy that was affirmed in an inspiring message from Governor General David Johnston during his visit to Cathy Wever school: *A smart, caring community is one that does everything it can to make barriers to learning easier to overcome...it's also how we will build a better country.*

We thank retiring Board member Tom Marlcor for his contributions, and as always we remain ever grateful to our donors, partners, board, staff and all who work toward realizing the picture of a vibrant, inclusive Hamilton.



Terry Cooke, President & CEO  
Brent Foreman, Board Chair



# NEWEST LINK IN COOTES TO ESCARPMENT CHAIN MAKES HAMILTON “NATURALLY CONNECTED”

Buying property, they say, is all about location—especially when it comes to the purchase of two critical pieces of land in the Dundas Valley, made possible by Hamilton Community Foundation.

The properties sit in the Cootes to Escarpment EcoPark System, an ongoing initiative to protect, connect and restore more than 9,600 acres of some of Canada’s most biologically diverse land. The two properties, both located in the Pleasant View area, now create a protected wildlife corridor stretching from marsh to Mountain.

“These two properties were the key to everything,” says Jen Baker, land securement co-ordinator for the EcoPark System. “We wanted them for years. Now there’s a permanent dark green link between Cootes and the escarpment.”

Both properties are nesting sites for endangered birds and home to wild plants. “They are significant both in terms of the role they play in the landscape and the habitat they provide,” Jen says.

The EcoPark System’s partner organizations had enough funds to buy one property and had been told the second would have a year-long closing, giving them time to raise the extra money.

Suddenly the game changed: they would have to purchase both properties at once. That’s where HCF came in.

The Foundation stepped up with support on a number of fronts. A grant from the Frank Charles Miller Fund helped buy the first property, and the Heather and Ross Hamlin Fund not only provided a grant to help with the land purchase but is also offering another \$150,000 to match funds raised from individuals in the community. The Foundation also provided a loan through its Hamilton Community Investment Fund.

“The whole deal would have fallen through without HCF,” Jen says. “We might have been able to go back to the table at some point, but it would have put the whole project in jeopardy for an indefinite period of time.”

“This project is not only exciting because of the land it protects,” says Annette Aquin, HCF’s Executive Vice-President, Finance and Operations. “It also uses HCF’s full complement of resources to drive positive change. When the loan is repaid, the money will be directed to other important projects and the interest will be used for future granting. It’s really a win-win for Hamilton.”



“ I have found in my work with landscape painting a very interesting phenomena. I find that a location, while the image seems like it could be anywhere, is so recognizable to the people of the area. Our landscape is precious to us. Cootes Paradise is a refuge and a resource that I am honoured to have translated into my language of colour, shape and light. I ‘own’ it now. Just like Hamiltonians do too.”  
**Julia Veenstra, Artist**



# New fund helps Canadian Warplane Heritage Museum fund take off

## Hamilton treasure is HCF's newest agency fund

Establishing a long-term endowment fund at Hamilton Community Foundation has given the Canadian Warplane Heritage Museum “instant credibility” with contributors says the museum’s President and CEO, David Rohrer.

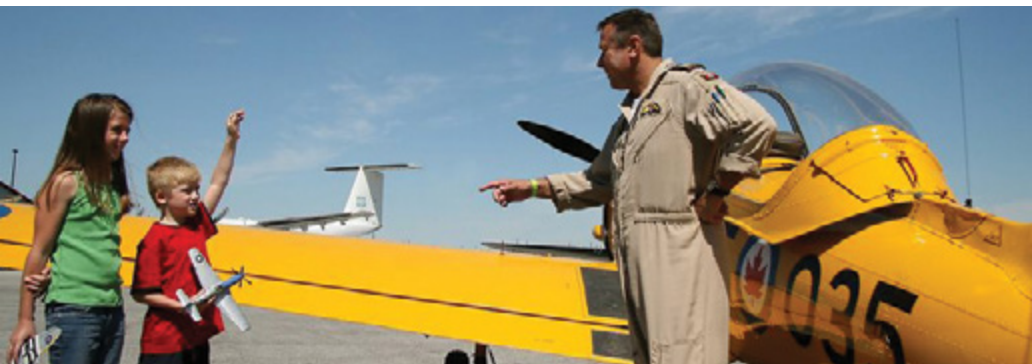
“We needed to develop a legacy gifts program for the museum,” he says, “and we quickly realized that we weren’t best suited internally to manage those investments. The community foundation offers the expertise we need. We are very pleased to be affiliated with HCF in this way. It was the right step.”

David points out that placing its endowment with HCF — the organization made its initial investment in 2015 — also exposes the museum to a wider range of potential supporters. The museum has a goal of contributing 10 percent of undesignated gifts to the fund, he says, and having the endowment at arm’s length protects it from the pressures of day-to-day operations.

“We are community-based and proud to be in Hamilton,” says David, “and we are very grateful for HCF’s support of the museum’s High Flight program, in addition to the endowment fund.”

The High Flight initiative offers field trips and approved curriculum to Grade 6 science and Grade 10 history students. Twenty-five schools in the region participated this year. David illustrates the influence of the program: one of Canada’s current CF-18 fighter pilots reports that he got his first taste of aviation with a visit to the museum decades ago.

“The Canadian Warplane Heritage Museum is the largest flying museum in Canada,” says Terry Cooke of HCF. “It has been a Hamilton treasure for 44 years. We are thrilled that such an outstanding organization trusts us to manage its long-term endowment.”



The CWHM educational program reaches hundreds of Hamilton schoolchildren throughout the year.

# Community Fund flexibility guides couple’s philanthropy



“The Foundation is in a position to best determine the needs of the community and this gives them the capacity to respond.”  
**Marnie Brehm**

Marnie and Bill Brehm

## The Brehms have confidence in HCF's decision-making

Marnie Brehm has been involved with Hamilton Community Foundation since the 1980s, as a Board member and a contributor. She knows it well and trusts it to understand community needs. She and her husband Bill contribute regularly to the Community Fund.

“The Community Fund gives the Foundation capacity to respond to the most urgent needs in the community,” she says. Recent examples include the Foundation’s poverty work and its ABACUS education initiative.

Marnie, an accountant, and Bill, a retired planning consultant, have volunteered their time and talents at the leadership level in many organizations over the decades and they have confidence that Hamilton Community Foundation assesses community needs effectively. That is one reason they support the Community Fund — what Bill says in other organizations might be called the “general fund.” They also like the flexibility the Community Fund gives the Foundation and the speed with

which it responds to changing community needs.

Marnie and Bill both support the community in a variety of ways — through HCF and other organizations — and they feel giving to the Community Fund is an important component of their philanthropy.

“While we could choose to support a particular cause or issue — and we do that in other aspects of our giving — we think the Community Fund is crucial too,” Marnie says. “The Foundation is in a position to best determine the needs of the community and this gives them the capacity to respond.”

Bill agrees. “Marnie’s Board experience and our contacts with staff give us confidence in the Community Fund decision-making process. The Foundation works hard to identify and address key needs to be filled in the community.”



# WITH EVERY HAMILTON YOUTH POETS PERFORMANCE, COMES OPPORTUNITY

The art of spoken word is an ancient tradition that continues today through Hamilton Youth Poets. Created in 2012, “HYP” provides a platform for new young voices to muse on their city through poetry, journalism and hip-hop.

“HYP gives Hamilton’s youth an opportunity to develop their creative skills and have their voices heard,” says artistic director Nea Reid. “It’s a ‘brave’ and positive space to express ideas, stories, experiences or simply a new concept.”

HYP supports youth who want to engage in the literary arts, develop their voice, and bring it all together at poetry slams — competitions at which poets read or recite original work, and which feature a broad range of voices, styles, cultural traditions, and approaches to writing and performance.

“Teams come together and talk about their lives, where they’re from, their social situations and the world around them,” says Nea. “They connect with people that they never would have met. And that creates bridges, community and social activism.”

Nea lauds the support HYP has received from the community, especially from Hamilton Community Foundation. “Their support has allowed us to

pursue high-calibre year-round programming, to grow and to embrace more young Hamilton poets.” It has also helped HYP’s small but passionate team of volunteers conduct school workshops across Hamilton. They reach out to students to share what happens when you become part of a collective of writers, including developing your literary skills, public speaking abilities and the leadership qualities needed to take you further in life.

Kenneth Salazar-Cordova says coming out to slams was his best decision ever. “I made it through my first performance nervously,” says Ken, who made it to the HYP team and competed nationally. “I’ve developed certain skills that probably would have taken me a lot longer without HYP. And it has built my self-esteem and self-confidence.”

“It’s such an amazing cultural scene in Hamilton,” says HYP member Lex Leosis. “It’s so family- and community-oriented, and so proud of its collective roots. It’s very inclusive. At HYP, we mentor each other, learn from each other, and age just doesn’t matter. Whether poets, songwriters or MCs, mastering their craft is what we’re all trying to do, and HYP provides us with the opportunity to do it.”



“We conquered yesterday” — from a Hamilton Youth Poets piece — is such an optimistic sentiment, strengthened by the suggestion of struggle. Looking forward and back at once. I aimed to complement this approach with a dynamic painted lettering style.

**Jamie Lawson, Artist**

Read the full poem at  
[hamiltoncommunityfoundation.ca](http://hamiltoncommunityfoundation.ca)





“

I want to see a Code Club in every school in Hamilton. Of all the things that are happening in tech in the city right now, I think this is the most important.

**Kevin Browne, Founder - Software Hamilton**

”

Viscount Montgomery's Code Club is one of 17 supported by ABACUS funding.

## Code Clubs open doors to a high-tech future for middle-school students

### Canadian ICT workers are in short supply

Ten Grade 6, 7 and 8 students are spending their nutrition break learning how to make a video game—and at the same time learning they could have a bright future in technology.

The club at Viscount Montgomery Elementary School is one of 17 currently offered to middle-school-aged students in Hamilton's public and Catholic schools. Three years of ABACUS funding from Hamilton Community Foundation is turning the clubs from a successful but resource-strapped pilot into a stable, sustainable program run through the

Industry Education Council. “Without HCF's support, we couldn't structure the program or follow up,” says co-ordinator Beth Gibson. “Now we have the resources to grow.”

Canada has a shortage of 182,000 information and communication technology (ICT) workers. Kevin Browne, founder of Software Hamilton and a Code Club champion, sees hundreds of local ICT jobs go to out-of-town talent because no one from Hamilton applies. “We have a pipeline problem,” he says. “If students aren't introduced to technology

in middle school they won't take it in high school and it might as well be rocket science.”

The weekly program targets schools in Hamilton's Neighbourhood Action Strategy, but any school is welcome, particularly if it encourages girls to join (only 24 percent of ICT workers in Canada are women). Weekend clubs and summer camps are planned for the Central Library. The clubs are facilitated by post-secondary students and ICT entrepreneurs. A McMaster University study will determine the program's impact on the post-secondary perceptions of students.

It's only week two at the Viscount Montgomery club, but already every iPad is running a rudimentary video game that the students have programmed themselves. “It's so

exciting to see their interest growing,” says teacher Sarah Weston. “Lightbulbs are going off. They're realizing it could be a career for them.”

“I want to see a Code Club in every school in Hamilton,” says Kevin. “Of all the things that are happening in tech in the city right now, I think this is the most important.”

# TERRY AND BRENDA YATES: PAVING A PATH FOR YOUNG HAMILTONIANS

Terry and Brenda Yates see the community foundation's current emphasis on education as a "natural evolutionary step" from its focus on eliminating poverty and they've made a significant commitment to help launch ABACUS, HCF's community-wide initiative.

"As a former teacher," says Brenda, "I believe that education is one of the best ways to bring people out of poverty. If you can help keep children on an educational path, they will find their way — despite difficult challenges in their backgrounds."

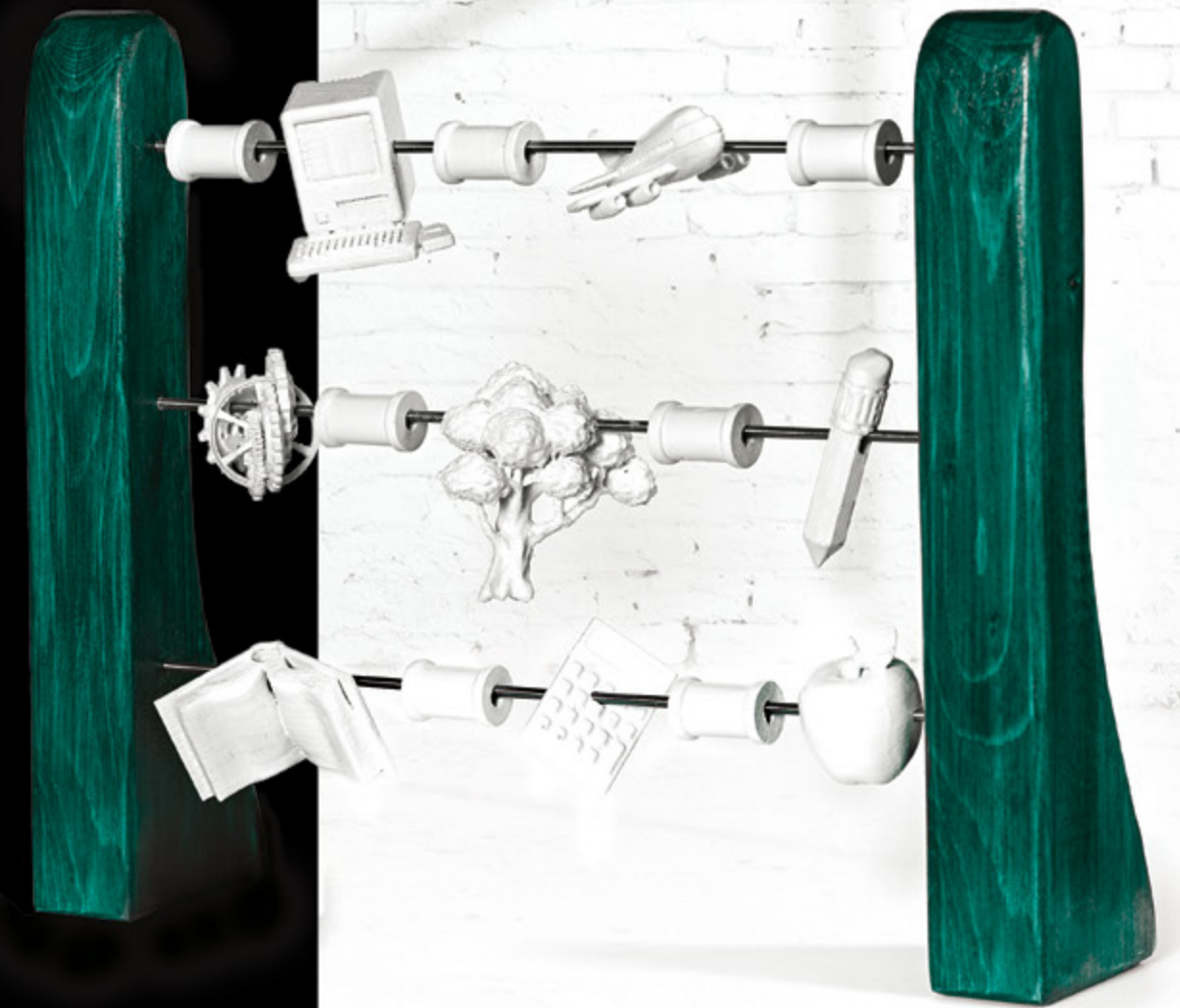
Terry points to the mentoring component of ABACUS as one of the critical factors. "If children see someone older succeeding because of education — an older brother or an uncle or someone else they know — it makes a huge difference. That's what we're trying to do."

The Yates have been actively involved with Hamilton Community Foundation since the 1990s and they appreciate its role in the community. "It's an incubator," says Brenda, describing the Foundation's process of researching issues,

bringing stakeholders together and crafting shared solutions that maximize every partner's unique contribution. They were early champions of the ABACUS idea and look forward to seeing it adopted in different ways across the community. Their new fund at HCF — the Terry and Brenda Yates Fund — is targeted at ensuring that "all children and youth have access to educational opportunities."

"HCF is playing a unique leadership role," says Terry, about why HCF is the home of their new fund. "The quality and commitment of the personnel at the community foundation is respected in the city. It's recognized as an organization that believes in the future."

Both Brenda and Terry love Hamilton and marvel at how readily Hamiltonians participate in philanthropy — with time or resources, each according to what they can do. While they are two outstanding examples whose impact is incalculable, Terry just says "if you have a chance to make a difference, you should take it."



“ The beads represent objects that relate to a student's potential through education. Each abacus bead was sculpted on a computer and then 3D printed.  
**Steve Mazza, Artist**

*Press print and make some art! Create your own 3D print of the book, pencil and apple beads from this piece using the artist's original designs. Download the STL files for 3D printers at [hamiltoncommunityfoundation.ca/nowpicturethis](http://hamiltoncommunityfoundation.ca/nowpicturethis)*



# Community leadership

Leadership on issues that affect Hamiltonians is one way the Foundation works to improve the city’s quality of life

**ABACUS: Advancing post-secondary access**

This year, the Foundation’s focus on increasing high-school graduation rates and post-secondary access culminated in the launch of a new initiative known as ABACUS.

ABACUS concentrates on the factors that most directly affect students’ likelihood of continuing their education. It focuses on Grades 6, 7 and 8, pivotal years that are characterized by significant developmental changes, yet among the least supported by focused community programs and other educational strategies.

Three years of research and consultation funded by The Fairmount Foundation spotlighted the importance of reaching children at this age, particularly those typically under-represented in post-secondary. It also identified that financial assistance, by itself, is not enough.

HCF’s Board has made a 10-year commitment of the majority of the Foundation’s discretionary funding to ABACUS, complemented by a 10-year commitment from The Fairmount Foundation.

**Nurse Family Partnership**

The Nurse Family Partnership (NFP) is an evidence-based program that has been proven to have a positive change on the life trajectory of vulnerable children and their mothers. It matches a nurse and a first-time, low-income mother early in her pregnancy, until the baby turns two.

In 2012 HCF embarked on a three-year joint funding arrangement with Employment and Social Development Canada (ESDC) to support NFP. This collective investment allowed 40 young mothers to participate in the program and enabled significant systems changes such as the development of a young-parent focus at Beasley Community Centre, and new pathways for young parents interested in accessing post-secondary education.

While HCF and ESDC’s agreement has concluded, HCF donor support to the NFP has remained high, providing funding for this important community program.

**Hamilton Anchor Institutions Leadership Table (HAIL)**

Hamilton faces both challenges and opportunities that can make a major difference to the well-being of its citizens. Recognizing that none of these prospects fall within the domain of a single sector or organization, “HAIL” has been created as a means for the city’s anchor institutions to work together more effectively on community-wide issues. As a founding member of HAIL, HCF participates along with institutions from the health care, education and private sectors, the City of Hamilton and police services. HAIL has identified affordable housing and community hubs as its priorities.

**Neighbourhood Leadership Institute (NLI)**

The NLI enhances the skills of neighbourhood and community leaders from across Hamilton. Participants engage in leadership training while developing a local project idea. Mohawk College has credentialed the program; participants receive a college credit upon successful completion and are then eligible to apply for an HCF grant to help launch their NLI projects.

The NLI has also partnered with McMaster University’s Centre for Continuing Education to develop the *Certificate in Leadership in Community Engagement*. The first of its kind in Hamilton, it is an academically recognized program supported by McMaster’s Faculty of Social Sciences and School of Social Work, as well as numerous community partners.

**Hamilton Roundtable for Poverty Reduction**

The Roundtable continues to build community understanding about the need to invest in poverty reduction. Successes this year included bringing its roster of living wage employers to 30, including The Hamilton Chamber of Commerce. The Roundtable also raised awareness about the challenges of payday lending, resulting in the City of Hamilton becoming the first Canadian municipality to license payday loan outlets and require lenders to provide credit counselling information.

This year the Roundtable and its new charitable sponsor, the Hamilton Community Legal Clinic, worked at the provincial level on a bill, which passed unanimously, to establish social assistance rates that reflect the real cost of living. At a national mayors’ summit on poverty, Hamilton’s Mayor Fred Eisenberger also announced a \$50 million initiative to invest in poverty reduction strategies which include affordable housing.



# PRO BONO LEGAL PROGRAM BRIDGES THE JUSTICE GAP FOR FAMILIES WITH SICK KIDS

When your child is in the hospital, the last thing you want to hear is you've lost your job because you've spent too much time away from work.

Thanks to the medical-legal partnership started by Pro Bono Ontario (PBO) at McMaster Children's Hospital, low-income families can get much-needed legal support when faced with such difficult circumstances. "These are families who are already doing so much," says lawyer Hilary Mack. "This service can take a little stress off their plate."

Hilary's title is "triage lawyer"—a nod to the hospital setting and a direct reference to her role as a resource for quick assessment and referral. "Like a doctor would look at a patient, I look at their legal issue and recommend how best to address it."

Consultations often happen at the child's bedside, but an important part of the program is training clinicians to recognize the signs of legal concerns so they can refer families. The most common concerns Hilary sees relate to family law, immigration, government benefits, employment, education and housing. She refers more complex

cases to the program's partners Ross & McBride and Gowlings, who take the cases pro bono, and the Hamilton Community Legal Clinic.

PBO has established medical-legal partnerships in five children's hospitals since 2009. The Hamilton program is a pilot supported by the Ruth Hindmarsh Atkinson Award. A grant from HCF's Edith H. Turner Foundation Fund is expanding Hilary's time onsite, which is critical to keeping the program top of mind for the clinicians who refer families to the services.

PBO executive director Lynn Burns says the program not only helps overwhelmed families focus on caring for their children, but the experience at Toronto SickKids shows other long-lasting benefits.

"Families may have multiple legal problems that have been unresolved for years," she says. "In our SickKids evaluation, none of the families had sought legal assistance prior to the social worker suggesting they contact our program—and 89 percent said we improved their financial situation. It's a good poverty reduction strategy."



“ This work depicts words overlaid with distinct shapes — the right represents the hospital staff, lawyers and funding, while the left is the family. Of interest is the independence of both shapes — never quite taking over or overlapping, but instead respecting the space and the support needed.”

**Stephanie Seagram, Artist**





“ It makes total sense to do pre-employment training here... the number one reason people access our services is insufficient income.”  
**Carmen Saliccioli,**  
**Director, Good Shepherd Centre**

At Good Shepherd, clients access emergency food with selection and dignity.

## Good Shepherd program takes participants from the Market Place to the job market

### Program builds real-world work experience

Michael Young always wanted to work as a security guard. Good Shepherd's Market Place work experience program helped him get there.

The Market Place is part of Good Shepherd's Venture Centre, a massive repurposed car dealership in downtown Hamilton that opened as the organization's clothing and emergency food program in 2015 and served 69,000 people in its first year.

"It's like a small Fortinos," says Carmen Saliccioli, director of the Good Shepherd Centre. "There is selection and dignity. We're a one-stop shop for everything."

Everything, it turns out, including a job.

An HCF grant is supporting the work experience program, which builds skills to help participants be job-ready. They are interviewed, receive training, follow a

workplan that they help create, get regular feedback and receive a reference letter on successful completion. The program is expected to assist 30 people during its first year, increasing to 80 annually by year three.

"It makes total sense to do pre-employment training here," says Carmen. "Our Market Place program evaluation showed that the number one reason people access our services is insufficient income."

Program participants stock shelves, work the cash, work in the warehouse and perform janitorial tasks—all skills they can transfer to a number of industries. Soon, job experiences will expand to include landscaping, painting, pest control and more.

Michael is proof that the model works. He started at the Market Place last June and today is working in the job he wanted. "Volunteering at the Market Place was something I could add to my resume," he says. "It showed my employer that I'm focused and dedicated to working and made me feel more confident."

"With this program, everyone has some skin in the game," Carmen says. "We do it together, not us on their behalf. The only thing holding us back is our imagination."



# WOMEN INFLUENCE THE PHILANTHROPIC CITYSCAPE

“When women give today, one thing they want to know about is the impact they are having,” says Renate Davidson.

Renate is a long-term, respected volunteer with HCF and many other organizations across Hamilton. As a founding donor to HCF’s Women 4 Change (W4C) initiative, she is struck by how women’s philanthropy “has evolved to something very different from just writing a cheque,” she says.

“A collaborative giving circle like W4C, for example, is an exciting new way to care for our community. It provides a unique opportunity to learn, to give, to work with other women and to see measurable results.”

New research confirms women’s growing influence through individual and family philanthropy, and provides detail on how they prefer to give. Women want to contribute money as well as time, to connect with others as they give, and to have an ongoing relationship with the causes they support. They value learning about community needs and responses, and they want to see measurable results.

Meeting these expectations drives both Women 4 Change and HCF’s engagement with individual donors. Since its 2012 launch, W4C

has grown to more than 60 women collaborating to improve the lives of Hamilton’s women and girls. At the same time, they are enhancing their own capacity as philanthropists through expert presentations, site visits, and conversations with grant recipients.

W4C builds on HCF’s long history of generous and visionary female donors, notes Sheree Meredith, Vice-President, Philanthropic Services. “Both our first gift and our first bequest came from women,” she says. “The Chaney-Ensign sisters who made post-secondary education possible for hundreds of Hamiltonians are another of dozens of powerful examples of women whose philanthropy continues to have a transformative impact on our city.”

“I would encourage anyone to have a conversation with the Foundation about how they can participate in giving to our community in ways that are most meaningful to them,” says Renate. “This has been a lifelong learning for me, and has sensitized me to our city’s challenges and opportunities. Working through HCF has been incredibly satisfying.”



“The main points of inspiration derived from this painting are the nurturing quality of women in philanthropy, the cultural diversity of Hamilton and the red symbol of the Cinquefoil flower which binds them all together.”  
**Lester Coloma, Artist**



# Funds and contributors in 2015-16

People who give to Hamilton Community Foundation share the desire to make a difference for Hamilton, forever. Donations 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, when shown, reflect the fund's capital. Amounts granted from these funds are identified in the listing beginning on page 36.*

## Community Fund

Giving to the Community Fund provides HCF with the greatest flexibility to respond to the community's needs. Donations of any amount are welcome. Donors whose accumulated endowed donations total \$5,000 may choose to have a named fund within one of four Community Funds: Unrestricted, Arts, Environment or Smart and Caring. All donations to the Arts or Environment funds will be matched by the Foundation on a one-to-one basis up to \$1 million. The individual funds are listed below and the amounts include matching funds, where indicated.

### Community Fund/Unrestricted funds

This fund is used to address the highest charitable priorities in the community.

<b>#HamOnt Forever Fund</b>	<b>5,000</b>	Sandra & John Black Fund	124,330
Donald J. Allan Fund	103,514	<b>John &amp; Joan Bothwell Fund</b>	<b>10,000</b>
Marjorie L. Allan Fund	5,000	William F. Brand Fund	8,404
Doris M. Allen Fund	172,918	Marnie & Bill Brehm Family Fund	29,500
Caroline May Alvey Fund	118,000	Dorothy & Tralice Broadbent Fund	7,000
Frances W. Ambrose Fund	5,600	Mary & Earl Brooks Fund	1,354,969
Helen Mary Archambeault Fund	25,316	Ernest & Ruth Brunton Fund	24,000
Lillian Boyd Barnby Fund	10,000	Irene Caldwell Memorial Fund	10,000
Gilbert P.V. Belton Fund	175,088	Henrietta F. Campbell Fund	104,959
Horace A. Bennett Fund	10,000	Donald & Alice Cannon Fund	11,225
Anne M. Biggar Fund	460,327	Charlotte Cauley Fund	34,987
Doreen & Gordon Birk Fund	98,409	Dorothy Cauley Fund	78,831

M. Jessie Chagnon Fund	71,196
Harold E. Clarke Fund	86,120
Florabel Condry Fund	25,000
Petra Cooke Memorial Fund	26,950
<b>Christina Cooper Fund</b>	<b>162,500</b>
Donald A. Cooper Fund	40,126
Ralph W. & Evelyn J. Cooper Fund	151,000
Ian & Donna Cowan Fund	5,450
Robert D. Crockford Fund	14,075
Vangie M. Crosthwaite Fund	40,000
Renate & Bob Davidson Fund	9,000
A. May Davis Fund	41,598
E. Francis Dennee Fund	24,322
Alphonse Dirse Fund	48,344
Vera M. Elwin Fund	536,235
Fell Family Fund	32,065
Edna Fern Flewelling Fund	29,761
Eleanor Foster Fund	869,072
Herbert P. and I. Flora Frid Fund	354,466
John H. Frid Fund	548,347
Gallagher Family Fund	62,700
Margaret & William Gilmour Fund	8,380
Robert C. & L. Ann Glass Fund	90,000
Erma Z.L. Goering Fund	888,437
Alice Redman Gooch Fund	25,025
Dr. Ronald P. Graham Fund	16,814
Averil Gray & Florence Gray Fund	1,172,308
J.M. Walter Hahn Fund	5,000
Elizabeth Mary Hamilton Fund	30,000
Christina I. Hammant Fund	250,000
Helen Gertrude Harrison Fund	34,222
Robert J. & Joan Harrison Fund	10,266
Lulu Blanche Hart & Harry Utter Hart Memorial Fund	778,782
Mary E. Hatch Fund	116,000
Margaret Anne Hayward Fund	797,598
Donald H. Henderson Fund	408,597
Gordon & Ethel Holmes Fund	97,572
Erie Hossack Fund	58,638

Clare B. Hunter Fund	13,079
Mildred E. Hunter Fund	100,878
Elsie M. Husband Fund	12,300
Francis Spence Hutton Fund	32,650
Ralph E. Ingraham Fund	16,017
W. Jones Fund	25,920
William Gordon Kitchener Fund	60,000
<b>Tod Laing Fund</b>	<b>7,950</b>
Lakin Family Fund	11,200
Tim and Dale Langs Fund	113,039
Daniel T. Lawrie Fund	115,529
Mabel D. Leadlay Fund	75,891
Elizabeth Lee Fund	11,775
Russell & Mae Lindley Fund	10,400
Dorothy I. Linfoot Fund	20,588
Evelyn Patricia Lyons Fund	5,000
Cameron K. MacGillivray Fund	9,325
Josephine Magee Fund	204,057
D. Argue Martin Fund	20,340
Dr. Carl Martin Memorial Fund	5,000
Kathleen L. McBride Fund	11,632,794
Robert P. McBride Fund	1,636,012
The Samuel & Dora McFarlane Fund	14,000
Brenda & Reg McGuire Fund	5,150
Lindsay M. McLennan Fund	78,022
Flora L. McNeil Fund	30,165
Jack McNie Fund	26,000
Jane Milanetti Fund	9,850
Frederick J. Mills Fund	26,189
Eleanor Jean Milton Fund	63,610
Alice Vera Morgan Fund	338,065
Brenda Morris Fund	5,000
Mount Hamilton United Church Legacy Fund	20,000
Catherine C.H. Murray Fund	50,050
Annie S. Nieman Fund	36,081
Dr. Alexander A. Numbers Fund	5,844
Peter & Rose Marie Palmer Fund	5,860
Laurence Cholwill Patterson Fund	351,146

*Funds shown in bold were established in 2015-2016*



Stewart Philp Fund	45,000
James & Mary Phin Fund	106,545
Project Sunday Fund	8,771
Ethel H. Prouse Fund	181,684
Charles & Catherine Ralph Fund	43,131
James D. Redmond Fund	6,033
Edna E.R. Reeves Fund	78,766
Reynolds Family Fund	135,239
Samuel Ringer Fund	70,586
Edna Robertson Memorial Fund	29,000
Royal Hamilton College of Music Faculty Fund	5,963
Jessie Rumney Fund	10,000
Joan W. Rutherford Fund	5,000
Bertha Savage Fund	47,806
Martha McKinnell Serrels Fund	94,682
John Shea Memorial Fund	8,387
Harvey and Audrey Smith Fund	495,778
Eleanor M. Smith Fund	10,000
Grace J. Smith Fund	13,030
Patricia Eileen Smith Fund	5,150
Sarah Smith Fund	230,729
William S. Sparham Fund	25,236
Robert George Sparre Fund	34,410

The Spectator Fund	10,000
Marnie Spears Fund	18,820
Ruth G. & Fred J. Spencer Fund	23,000
Leanora M. Spicer Fund	26,600
Evelyn & Richard Geraghty Storms Memorial Fund	25,000
Mabel Beatrice Studd Fund	15,000
Alfred Charles & Pearl Gertrude Swanwick Fund	200,000
A.H. Tallman Bronze Co. Ltd. Fund	21,790
Vincenza Travale Fund	18,200
Margaret E. Tschetter Fund	383,739
Howard & Edna Tugman Memorial Fund	100,000
United Nations Culture of Peace Hamilton Fund	13,400
Eulalia D. Wall Fund	170,977
West-Moynes Fund	8,500
Wheeler Family Fund	8,100
Gladys A. Whittaker Fund	26,205
Noreen & Seymour Wigle Fund	15,000
Marjorie Wild Fund	30,724
James & Irene Wilson Fund	6,000
Jack A. Winser Fund	155,007

# 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 appropriate grant recipients each year.

Ike & Shahnaz Ahmed Foundation Fund	36,341
The Alice Jean Ainsworth Memorial Fund	1,636,853
Nelson Allan Fund	151,139
The Angel Fund*	113,401
<b>Barbara Bethune Fund*</b>	
Mary Lauder Cassidy Fund	214,293
Community Health, Education & Research Fund	1,284,367
Dorothy & Frank Bliss Fund	619,602
McGregor Clinic Fund	144,268
Mary S. & James P. Phin Respiratory Disease Research Fund	518,950
Giovanni & Grazia Criminisi Literacy Fund*	33,053
Delaware Fund	391,637
Dougher Community Fund	2,762,318
Shirley M. Elford Gift of Today Fund	117,742
Russell I. Elman Fund	1,803,783
Barbara Farnan Fund	161,600
First Place, Hamilton Tomorrow Fund	255,041
Foxcroft Family Youth Fund	28,288
Betty & Jack George Family Fund	26,366
Gibson Trust/Town of Flamborough	35,283
Edward & Gladys Halloran Memorial Fund	841,241
Hambro Fund	42,035
Barbara & Bob Harwood Fund	158,212
Hogarth Family Pioneer Energy Fund	1,206,386
Florence E.S. Hutton Fund*	573,164
Arthur & Helena Lemon Fund	91,174
Jane C. LeWarne Fund	17,826
Antonina Lombardo Fund	138,736

Ray Lowes Environmental Fund	444,437
Marchese Health Care 50th Anniversary Legacy Fund	49,400
George & Shirley McBride Foundation Fund	1,115,179
Carolyn A. Milne Leadership Forum Fund	45,922
Note-Able Music Fund	57,152
Alfred & Joan Robertshaw Memorial Fund	806,430
Royal Canadian Humane Association Fund	75,472
School Sisters of Notre Dame Legacy Fund	
Jeanne Scott Fund*	1,140,493
Bill & Tina Seale Fund	345,446
The Glenn & Sidney Sellick Fund	10,397
Lillian M. Shaw Fund	248,379
W. Robert & Marion S. Shivas Conservation Trust Fund	323,279
Charles & Ret Swire Fund	180,958
Fund for Underprivileged Children	492,364
The Van Dusen Fund*	463,945
Joan C. Watt Memorial Fund	36,359
Women 4 Change Fund	67,267
Terry & Brenda Yates Fund	1,052,038
Kenneth Boothe Young & Marie Catherine Young Fund	1,216,715
Youth & Philanthropy Fund	119,747

## Community Fund/Arts endowment funds

This fund is directed to addressing needs and priorities in the arts sector in Hamilton. As of March 31, 2016, donations totalling \$32,138 have qualified for a matching contribution.

Gail Robinson-Gow Fund	53,876	Accumulated donations under \$5,000	400
<b>Linda Towart Arts Endowment Fund</b>	<b>10,000</b>	Fund matched donation total	64,276

## Community Fund/Environment endowment funds

This fund is directed to supporting a range of initiatives and organizations that are key to Hamilton’s environmental well-being. As of March 31, 2016, donations totalling \$326,279 have qualified for a matching contribution.

Robert D. Crockford Fund	21,120	The Young Fund	15,145
Irene Emily Lowes Fund	21,493	Accumulated donations under \$5,000	9,945
US Steel Canada Environment Endowment Fund	600,000	Fund matched donation total	667,703

\* These funds contribute to the Community Fund



## Ontario Endowment for Children & Youth in Recreation Fund

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

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

## Donor-advised funds

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

<b>Apollo Fund</b>		Tara Lynn Giuliani Foundation	254,987
ArcelorMittal Dofasco Children and Youth Fund	40,200	Lillian & Marvin Goldblatt Family Fund	230,706
Hugh C. Arrell Memorial Fund	30,301	Heather & Ross Hamlin Fund*	9,266,983
Ella Baird & Grace Baird McQueen Memorial Fund/A.J. McQueen	33,470	Heels Family Vocal Award Fund*	244,569
W.L. Carpenter Memorial Fund*	2,361,172	Hogarth Family Foundation Fund	2,037,638
Michael Chamberlain Fund	50,500	Mildred Dixon Holmes - Youth Orchestra Fund	366,278
Chedoke Health Foundation Fund	5,125,071	Hutton Family Fund*	
Clark Family Foundation Fund	1,035,785	<b>Dr. Bob &amp; Mildred Kemp Palliative Care Education Fund</b>	<b>50,000</b>
<b>Dufresne-Ray Family Fund</b>		Kirkpatrick Fund	53,622
Lois Evans Natural Heritage Fund	92,188	Lawyers’ Legacy for Children	181,068
Elham & Joseph Farah Family Foundation Fund*	53,010	Losani Family Foundation Fund	135,401
Fengate Community Foundation Fund*	1,030,834	The Malloch Foundation Fund	711,580
The Ron & Gina Fraser Endowment Fund	23,920	John & Esther Marshall Memorial Fund	248,528
The Gilmour Fund	140,286	The Martin Foundation Fund	1,154,272
		Mayberry Family Fund*	220,951

McCallum, McBride Fund	936,303
Carolyn & Paul Milne Fund	41,844
Audrey & Alan Moffett Fund	
Mark & Barbara Nimigan Fund	105,580
Kathleen C. Nolan Education Fund	38,138
John & Mary Reesor Fund	156,000
<b>Rotary Club of Hamilton East-Wentworth Foundation Fund</b>	<b>87,000</b>
Ed Smee Conserver Society Environmental Fund	38,385

<b>Stover Family Fund</b>	
Glen & Debra Swire Fund	56,749
Thorne Family Fund	31,568
Tran Family Fund*	33,620
Karen & Peter Turkstra Family Foundation Fund	
Edith H. Turner Foundation Fund	6,249,781
Williams Family Fund*	74,138
The Young Fund*	33,546,578
Several anonymous funds	1,617,766

## Designated funds

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

Douglas J. Clark Fund*	130,655	PHOG Endowment Fund	323,668
Cygnus Fund	144,048	Eva Rothwell Resource Centre Fund	102,500
Walter & Mildred Danby Fund*	475,302	Samaritans’ Tithe Fund	254,766
Frank Charles Miller Fund*	1,143,900	<b>Joe, Filomena and George Seliga Holdings Fund</b>	
Phenix Fund for Animal Welfare	114,864	Stoney Creek Health Fund	647,531
James P. & Mary S. Phin Charitable Fund	210,016	United Way Fund/Kenneth R. Walsh	220,357

## 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	797,068	Lee Hepner Award Fund	25,000
Amanda Marie Cowan Memorial Scholarship Fund	25,773	Mildred Dixon Holmes - Artist of the Year Fund	32,505
Cowan Family Fund	25,275	Russell & Elizabeth Lindley Fund	157,509
James Darby Bursary Fund	336,766	Music Bursary Fund	36,297
Eugene B. Eastburn Fellowship Fund	815,657	Rundle Foreign Study Bursary	36,603
Howard Fairclough Organ Scholarship Fund	53,999	John E. VanDuzer Scholarship Fund	30,723
Geritol Follies Bursary Fund	161,006	Albert & Betty Walters Fund	61,022
Daniel Giannini Fund	1,036,806	Jervis B. Webb Company of Canada Scholarship Fund	231,835
Christina Hamilton Scholarship Fund	42,459	Ross F. Webb Bursary Fund	60,331
William Allison Haynes Fund	21,969		



# 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	89,299	Hamilton Public Library Library Legacy Fund	476,547
Art Gallery of Hamilton-Building a Legacy Fund	267,508	HWDSB Foundation Endowment Fund	27,500
Bay Area Science & Engineering Fair Fund	25,421	Interval House (Hamilton) Freedom and Hope Fund	95,196
<b>Canadian Warplane Heritage Museum Endowment Fund</b>	<b>27,500</b>	Dr. Bob Kemp Hospice Endowment Fund	111,008
Catholic Children’s Aid Society - Ralph and Rose Sazio Scholarship Fund	121,298	Rotary Club of Hamilton - Rotary Forever Fund	92,802
<b>Catholic Children’s Aid Society - Ersilia Dinardo Scholarship Fund</b>	<b>60,000</b>	Scouts Canada, Hamilton Wentworth Endowment Fund	177,935
Children’s International Learning Centre Endowment Fund	77,310	United Way Tomorrow & Forever Fund	1,579,222
Hamilton Naturalists’ Club:  Habitat Preservation Endowment Fund	  167,213	YWCA Hamilton Endowment Fund	752,296
Conservation & Education Endowment Fund	46,699		
Ecological Research Endowment Fund	28,509		

# 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	30,006	Marjorie & Bill Nelson Fund	115,595
Ross & McBride, LLP Fund	26,107	Thérèse & Kent Newcomb Fund	11,669
Judith McCulloch Tribute Fund	12,872	Brenda & Terry Yates Fund	115,744
Judith & Peter McCulloch Fund	46,089	Anonymous Fund	14,086

# 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	6,879,372	Hamilton Public Library Funds	1,177,574
---	-----------	-------------------------------	-----------

# Funds in progress

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

Robert P. Beres Fund	<b>Great Lakes Trust Fund*</b>
Board Leadership Fund	Shirley M. Elford Artist’s Fund
Ray Brillinger & Cy Hack Fund	Bruce Hamilton Family Fund*
Bruce Trail Conservancy Endowment Fund	Hundred Waters Foundation Fund*
Marjorie Hawkins Clark Fund	Meredith Family Fund
Conducive Fund	Porto Family Fund
Cooke Family Fund	Mark Preece Family House Endowment Fund
CPRS Hamilton Legacy Fund	Revolution Hope: Claire Lewis Foundation Fund
David Davis Memorial Fund	Sons of Italy Hamilton Trieste Lodge Legacy Fund
Jeff Dickins Memorial Fund	
Dream Weaver Fund	

# Flowthrough funds

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

#HamOntForever Fund	Hamilton Prosperity Fund
Ambery Fund	Hamilton Spectator Summer Camp Fund
Bay Area Arts & Heritage Fund	Payne Fund
Marlies & Alan Clark Fund	Pioneer Energy Foundation
Ellen Creaghan Fund	School Nourishment Fund
<b>Creative Arts Fund</b>	Social Enterprise Fund
Farah Charitable Fund	True Sport Fund
Ron & Gina Fraser Fund	Young Response Fund

# Life insurance policies

The Foundation owns and is beneficiary of life insurance policies donated by Sheila Davies, Helen F. Lofthouse, Judith McCulloch, Joan VanDuzer, Ronald J. Zabrok and two anonymous donors.

Total face value: \$933,130

# Estates under trustee administration

At the time of publication, the Foundation had been notified of a charitable donation (subject in some cases to the life tenancies of others) in the following estates or trusts: Joyce Clark, Christina Cooper, James Walker Culhane, Victor Roy Farr, Barbara Farnan, Ross Albert Hamlin, Janet Hope Marusaik, Mary Joan Bonner Renison, David Godfrey Rule, Tina Sophia Seale, George Kookson Seliga, Harvey Roy Smith, Maria Swarchuk, Vera Gertrude Tomlinson, Vincent Michael Wajar.



# Community leadership projects

These projects include HCF’s own community leadership activity, as well as projects where we act as an intermediary to assemble funding for multi-organizational community initiatives. The projects may span multiple years, and are funded by new donations as well as by board-directed funds; this list represents current year funders.

City of Hamilton	Hamilton-Wentworth District School Board Foundation
The Fairmount Foundation	
Hamilton Chamber of Commerce	McMaster University
Hamilton Health Sciences Corporation	The Michael Young Family Foundation
Hamilton Niagara Haldimand Brant Local Health Integration Network	Mohawk College
Hamilton-Wentworth Catholic District School Board	St. Joseph’s Healthcare Foundation
	The Winnipeg Foundation

## 2015-16 Contributors

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

AbleLiving Services Inc.	William Bastien	Richard & Carole Capling	Donna Cripps	Rick & Justine Giuliani	Greg Kaiser
Ed & Rosemary Addison	Noel Baxter	James & Helen Cardwell	Robert D. Crockford	Robert C. & L. Ann Glass	Sylvia Kajiura
Ike Ahmed	Bay Area Science & Engineering Fair	Catastrophe Indices and Quantification Inc.	Amy-Willard Cross	Jeff J. Glen	R. Donald & Evelyn C. Kidd
Yaman Al-Nachawati	Duncan G. Bell	Catholic Children's Aid Society of Hamilton	Marion Cruikshank	Sarah Glen	Loren King & Kim Dej
Jill Anderson & family	Bike for Mike supporters	Fred & Sharon Charters	Margaret Cunningham	Matt & Sarah Goodman	Helen Kirkpatrick
Aqueduct Foundation	John & Sandra Black	Chedoke Health Foundation	Dr. John & Yvonne Cunnington	Susan Goodman	Alfreda Klimowicz
ArcelorMittal Dofasco Inc.	Joshua I. Bonilla	CIBC World Markets Children’s Foundation	Ray Cunnington	W. Ian Gordon, QC	Arthur Klimowicz & Donna Patterson
Caroline Archer	Wendy Brawn	Benjamin J. Ciprietti	Lisa Dalia	Lauren Graff	Michael Klimowicz
Dr. Jane Aronson	Bill & Marnie Brehm	City of Hamilton	Dr. Juliet Daniel	Ian Graham	Stanley Klimowicz
H. Anthony & Anne Arrell	Ray Brillinger & Cy Hack	Alan & Marlies Clark	Bob & Renate Davidson	Tanis Hall	Milé Komlen
The Honourable Mr. Justice Harrison Arrell & Diane Arrell	Abigail Brockhouse	Margaret Clinton	William M. & Susan J. Dell	Brian & Morag Halsey	Alyssa Lai
Affiliated Services for Children & Youth (ASCY)	Hazel M. Broker	Connor, Clark & Lunn Private Capital	Marnie Souter Denton	Hamilton Follies Inc.	Paul & Pam Lakin
Rich Auger	Ernest & Ruth Brunton	Terry Cooke & Maureen Wilson	Terry & Grace Diffey	Hamilton Law Association	Anne Lambert
Nancy Baker	Mary Buzzell	William Cooke	Kevin & Karen Dore	Hamilton Lawyers’ Club	Dr. Janet Landeen
Scott Balinson	Don & Helen Callaway	Dr. Justin & Jessie Cooper	David P. & Mary Jane Dutchak	Hamilton Third Age Learning	Tim & Dale Langs
Heidi Balsillie	Canadian Independent Adjusters’ Association	Tom Cooper	Sandra L. Edrupt	Hamilton-Wentworth District School Board Foundation	Martha Laurence
A. Barclay	Canadian Warplane Heritage Museum	Marie Copeland	Ann Elford & family	Annette Hamm	Paul Lee-Chin
JoAnne Barresi	Alice A. Cannon	Chantal Copithorn	Marion Emo	Gwen Harvey	Dr. Arthur L. Lesser
Geoff Barrett	Janet E. A. Cannon	Georgia Corkins	William Ernst	Barbara Harwood	Angel Li
Philippe & Mary Barrette	Paul & Sara Cannon	Anita Counter-Woolfenden	Dr. Bill & Jane Evans	Ruth Hatch	Edward Liptay
Mary Ann Bastien	Jane Capell		Lois Evans	JoAnne Haynes	Lodge of the Ancient Landmarks
			Dr. John Fabrizio	Dr. Joan B. Heels	Helen Lofthouse
			The Fairmount Foundation	Rob & Tami Henderson	Losani Homes
			J. Bruce Falls	Neil Hendry & The Honourable Madam Justice Jane A. Milanetti	Losani Family Foundation Fund supporters
			Joseph & Elham Farah	The Hermitage Club Inc.	Joan Lowry
			Yvonne Farah	Wendy J. Hough	Bill & Anne Lupkoski
			Kate Feightner	Gordon Howarth	Joanne Lynes
			Don Fell	Irene Hubar	E. Shirley Macnamara
			FELLFAB Limited	Michael & Linda Hughes	David Malcolm & Annette Aquin
			Deirdre Finlay	Bruce & Linda Hutchinson	The Malloch Foundation
			Theresa Finlay	John & Dr. Eileen Hutton	Dr. James & Leys Malpass
			Oksana Fisher	Ingenuity Development Inc.	Keith & Barbara Mann
			Frank & Lydia Fitz	Insurance Brokers Association of Hamilton	Ginny Mattuzzi
			Brenda M. Flaherty	Norma Jack	Joanne McCallum
			Lucy Foglietta	Cynthia Janzen	Mary McCallum
			Brent & Sally Foreman	Shirley A. Johnson	Shannon McComb
			Bob & Margaret Freeborn	Ginny Jones	Beverley J. McDonald
			Thomas & Joan Gallagher	Kathryn Jones	Sheila M. McDougall
			Anthony Gaston	Anju Joshi	Dr. Don & Kathryne McLean
			Paul Gibel		
			Mary S. Gilmour		



McMaster Mini Med School  
Program, McMaster University  
McMaster University  
Michael C. McMillan  
Janet McNaught  
Rev. Alan & Maureen McPherson  
Archie J. McQueen  
Grahame & Sheree Meredith  
Katherine Meredith  
The Michael Young Family  
Foundation  
Paul & Carolyn Milne  
Mohawk College  
Alex & Heather Moroz  
John-Rene Morton  
Dr. Henry & Betty Muggah  
Robert Munroe & Sheila  
Sammon  
Sarah M. Murphy  
Madhu Nagaraja & Dr. Suman  
Joseph  
George T. Nakamura &  
Marguerite Kelley  
Joyce Neal  
Angie Nesci  
Dermot P. Nolan  
John H. Nolan & Maureen  
Montemuro  
Megan O'Connor  
David Okines & Audrey Heagy  
Erin O'Neil  
Peter & Rose Marie Palmer  
Maureen Peacock  
Al & Lorraine Peckham  
Mike Petis  
William & Carole Pigott  
The Pioneer Group Inc.  
George E. Pond  
Steve & Mary Prime

Judith Pyke  
Diane Rawsthorn  
Jim Ray &  
Annette Dufresne-Ray  
RBC Foundation  
Residential Hospice of Grey  
Bruce Inc.  
Beatrice W. Riddell  
Prof. James Rising  
Marie L. Robbins  
Donna Robertson  
Gail Robinson-Gow  
Rotary Club of Hamilton  
East-Wentworth  
Rotary Club of Hamilton  
Sunshine Fund  
Nancy K. Rundle  
John & Dr. Leila W. M. Ryan  
Bob & Peggy Savage  
Jane Savage  
Sandy J. Schwenger  
Lori Serafini  
John Simpson  
Rosemary Smith  
Teresa Smith  
Marnie Spears  
The Hon. Robert D. G. Stanbury,  
QC  
Damin & Debra Starr  
Jo-Anne Stephens  
Sandra Stephenson  
Marta Stiteler  
Harald & Maria Stover  
Agnes Strike  
Dr. Robert G. Summers-Gill  
Sun Life Financial  
Charles & Ret Swire  
Glen & Debra Swire  
Dr. Lewis Tauber & Lori Dessau  
Tauber

Rose Taylor-Weale  
Anne Tennier  
Joshua E., Amy & Liam Thorne  
Patricia Timson  
Ruth Todd  
Dr. Ninh & Sarah Tran  
Vincenza Travale  
The Travelers Companies, Inc.  
Trinity College School  
Demetrius Tsafaridis  
Turkstra Lumber Company Ltd.  
Peter & Karen Turkstra  
Laura Tutte  
Kenneth J. Tyler  
United Way of Burlington &  
Greater Hamilton  
Urban Strategies Inc.  
Joan Van Damme  
Joan VanDuzer  
Jason Wagar  
Alan & Janet Walker  
Janet Walsh  
Patricia A. Walsh  
David & Nancy Wands  
Dr. Gary & Joy Warner  
Wearing of the Green  
Committee  
Beth Webel  
David Weber  
Rob Wiersma & Tracy Varcoe  
Joanne Wilkinson  
Gwyn & Gail Williams  
Bill & Marilyn Wilson  
The Winnipeg Foundation  
Patricia Woodford  
Marita Zaffiro  
Christel Zeyl

# Hamilton Spectator Summer Camp Fund

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

B'Nai Brith Sports Celebrity  
Dinner  
Canadian Orpheus Male Choir  
CIBC World Markets Children's  
Foundation  
Congregation of the Sisters of  
St. Joseph in Canada  
Duck Sports Inc.  
Elizabeth Eldridge  
Fabris Inc.

Festival of Friends  
The Hamilton & District Soccer  
Association  
Hamilton Burlington  
Automobile Dealer Association  
Hamilton Musicians' Guild  
Imperial Vending Services Inc.  
Leggat Chevrolet Cadillac  
Buick GMC Limited  
Nellie James Gourmet  
Food To Go

Players Guild of Hamilton Inc.  
Real McCoys  
Rotary Club of Ancaster AM  
Samuel, Son & Co., Limited  
Sonny Del-Rio & Friends,  
Hamilton Hometown Christmas  
Elizabeth Whetham

# Memorial donations received in honour of

Shirley Alphonso  
Carmen Viviane Balinson  
Joan Belmore  
Irene Booker  
William Trenton Bourque  
Mairi Johan Brodnicki  
Ian Bryans  
Joseph & Mildred Cardwell  
Donna June Carpenter  
Bruno M. Cesarani  
Frank Arthur Cooke  
John Edward (Jack) Cowan  
John David Dent  
A. Marie Dubé  
Gerald Elford  
Shirley Elford  
Joyce Mildred Flaherty  
Tara Lynn Giuliani  
Gordon Herbert Greenland  
Elizabeth Ellen "Liz" Gregory  
Roy & Hilda Henderson

Lindsay Webster Holton  
Alexander Hryshko  
David John Trevis Hussell  
Wendy Mae Janes  
Paul R. Jewell, QC  
W. D. (Dan) Jodouin  
Donald John Johnston  
John Joseph Kelly, QC  
Clare & Sarah Lakin  
William Gordon Lister  
Mary Lukachko  
Luba 'Louise' Lynes  
Jennifer Chorney McKeon  
Ian & Jane McNeill  
Rose Moroz  
Nancy Lou Nagawker  
Rev. Monsignor William "Bill"  
O'Brien  
Robert Allan Picken  
Raymond Michael Plant  
Jeanne Precious

Derek Price  
Leah Gow-Ricketts  
Poyntz & Annetta Ricketts  
Steve Sandor  
Philip & Rose Sawka  
Walter Sawka  
Helen Moore Sephton  
Barbara Smaluck  
William Lloyd (Bill) Stephens  
Lorne Stone  
David Joseph Stringer  
The Honourable Justice Donald  
Taliano  
Christiana Mary Florence  
Tidball  
Linda Towart  
Joyce Turcotte  
Dr. Neil Holden Webster  
Mary Doris Whitmore  
Shirley Marie Wilson



# Donations received in honour of

- Jane Allison

Dorothy Bartalos

Helen Callaway

Mark Clem & JoAnne Barresi

Christopher Cutler

Samantha Dean

David Derbyshire

Lori Dessau Tauber

Chris Farias

Catherine Gebhard

Glenn Gibson

Lisa Habisreutinger
- Hamilton Community Foundation staff

Linda Hughes

Helen Kirkpatrick

Pam Lakin

Andreas Link & Andrea Hunter

Jason & Ashley Lopez

Fred Losani

Anne Lupkoski

Judith McCulloch

Rev. Alan McPherson

Sheree Meredith

Carolyn Milne
- Betty Muggah

Trish Murphy

Reg & Carol Pollard

Bob & Peggy Savage

Armond Shahinian

Mukta Thapar

Dr. Ninh & Sarah Tran

Karen Turner

Heidi Van Damme

Kate Whalen

Bill & Marilyn Wilson

# Gifts in kind

- ArcelorMittal Dofasco Inc.

Best Start Network/Kiwanis Boys and Girls Club

Connor, Clark & Lunn Private Capital

Dr. Bernice Downey

Dundas Valley School of Art

Edmonton Social Enterprise Fund

Empire Steel Inc.
- ESB Lawyers LLP

The Hamilton Club

Hamilton Youth Poets

Stephen Huddart

ImpactLink Capital

Jarislowsky Fraser Limited

Kitestring

Lazier Hickey LLP

Kathy Merchant

Clara Miller
- Professional Show Services

Razavi Islamic Centre

Rodgers Investment Consulting

Soundbox Productions Inc.

Spice Factory

Staples Ancaster

Workers Arts and Heritage Centre



Governor General David Johnston listens to a St. Ann student.

# Governor General highlights importance of access to education

His Excellency Governor General David Johnston engaged and inspired students from Cathy Wever and St. Ann schools when the community came together to celebrate ABACUS, the Foundation’s 10-year commitment to increasing access to college, university and the trades. Evolving from the Foundation’s last decade of poverty-reduction experience, improving educational outcomes will be the primary focus of HCF’s unrestricted funding for the coming decade.

“A smart, caring community is one that does everything it can to make barriers to learning easier to overcome or, better yet, it removes them entirely,” said the Governor General, speaking to some 400 students, teachers and ABACUS partners in the Cathy Wever gym. He commended HCF and The Fairmount Foundation on the thorough research

and careful design of ABACUS, calling it “a wonderful focus on learning, mentoring, goal setting, incentives and, in particular, measuring impact.”

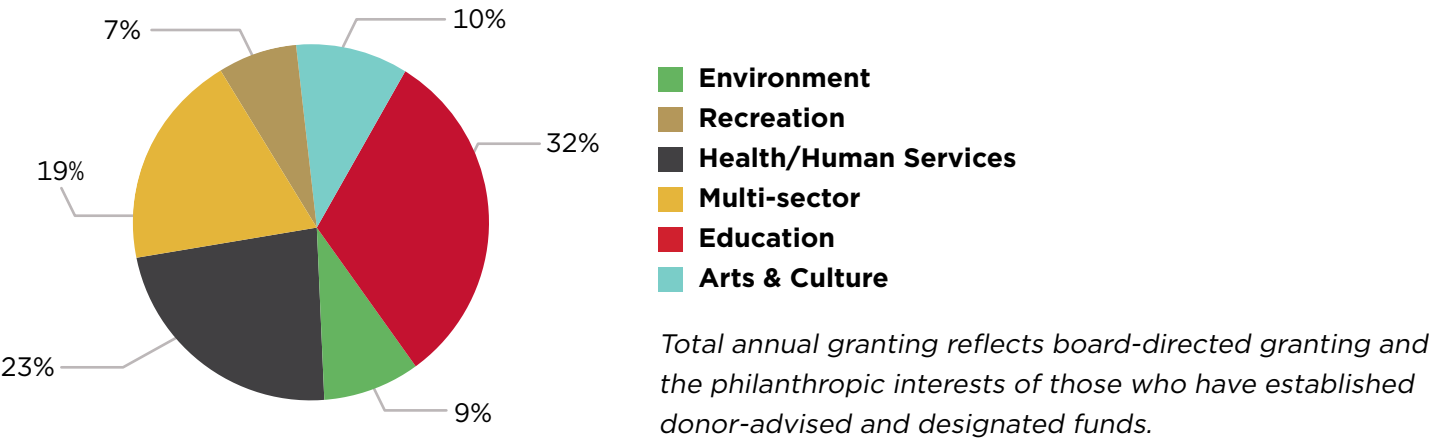
A lifelong educator, His Excellency put the middle-school students completely at ease, answering questions ranging from “did you always want to become the Governor General?” to his views on the importance of athletics to character and learning. As he complimented ABACUS, his message to students, teachers and supporters stressed the profound impact of education throughout life and the challenge our country still faces to make learning successful for every Canadian.

“Smart, caring initiatives like this one,” he said, “are how we’ll build a better country.”



# Grants and community leadership in 2015-16

Hamilton Community Foundation offers donors powerful opportunities to make a difference in the community. We are unique in that we enable donors to recommend grants to the widest possible range of charitable organizations and initiatives: arts and culture, health and human services, environment, recreation and education. Find out more at [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca)



## Grants by fund type

This list shows the total amounts granted from all funds at Hamilton Community Foundation identified by fund type. A list of grants by recipient organization follows on page 39.

### Grants from Community Fund

Creative Arts Fund	242,692	Immediate Response Fund	7,500
Unrestricted funds	1,916,805	<b>TOTAL</b>	<b>2,166,997</b>

### Grants from field-of-interest funds

#HamOntForever Fund	6,200	Dougher Community Fund	90,290
Ike & Shahnaz Ahmed Foundation Fund	5,600	Shirley M. Elford Gift of Today Fund	5,397
The Alice Jean Ainsworth Memorial Fund	77,673	Russell I. Elman Fund	35,529
Nelson Allan Fund	6,196	Barbara Farnan Fund	4,340
The Angel Fund*	8,822	First Place, Hamilton Tomorrow Fund	21,495
Board Leadership Fund	1,685	Foxcroft Family Youth Fund	1,345
Mary Lauder Cassidy Fund	12,049	Betty & Jack George Family Fund	1,295
Giovanni & Grazia Criminisi Literacy Fund*	2,309	Gibson Trust/Town of Flamborough	1,659
Delaware Fund	19,115	Edward & Gladys Halloran Memorial Fund	39,383

\* These funds contribute to the Community Fund

Hambro Fund	2,000
Barbara & Bob Harwood Fund	5,072
Hogarth Family Pioneer Energy Fund	61,783
Florence E.S. Hutton Fund*	23,186
Arthur & Helena Lemon Fund	5,000
Jane C. LeWarne Fund	1,492
Antonina Lombardo Fund	7,243
Ray Lowes Environmental Fund	20,632
Marchese Health Care 50th Anniversary Legacy Fund	2,395
George & Shirley McBride Foundation Fund	52,363
Note-Able Music Fund	2,937
Ontario Endowment for Children & Youth in Recreation Fund	54,103
Alfred & Joan Robertshaw Memorial Fund	17,779
Royal Canadian Humane Association Fund	3,539
School Nourishment Fund	65,000

### Grants from donor-advised funds

Ambery Fund	80,000
ArcelorMittal Dofasco Children and Youth Fund	75,000
Hugh C. Arrell Memorial Fund	300
Ella Baird & Grace Baird McQueen Memorial Fund/A.J. McQueen	3,325
W.L. Carpenter Memorial Fund*	191,635
Clark Family Foundation Fund	63,000
Marlies & Alan Clark Fund	75,500
Cooke Family Fund	7,800
Farah Charitable Fund	5,300
Elham & Joseph Farah Family Foundation Fund*	169
Fengate Community Foundation Fund*	42,511
The Ron & Gina Fraser Endowment Fund	5,200
The Gilmour Fund	20,000
Tara Lynn Giuliani Foundation	16,500
Lillian & Marvin Goldblatt Family Fund	19,000

School Sisters of Notre Dame Legacy Fund	10,488
Jeanne Scott Fund*	11,228
Bill & Tina Seale Fund	6,516
The Glenn & Sidney Sellick Fund	867
Lillian M. Shaw Fund	13,123
W. Robert & Marion S. Shivas Conservation Trust Fund	15,180
Charles & Ret Swire Fund	13,464
Fund for Underprivileged Children	23,097
The Van Dusen Fund*	34,752
Joan C. Watt Memorial Fund	1,508
Women 4 Change Fund	35,000
Terry & Brenda Yates Fund	42,890
Kenneth Boothe Young & Marie Catherine Young Fund	50,066
Anonymous	1,040
<b>TOTAL</b>	<b>924,125</b>

Hamilton Prosperity Fund	57,000
Hamilton Spectator Summer Camp Fund	69,650
Heather & Ross Hamlin Fund*	465,735
Heels Family Vocal Award Fund*	5,512
Hogarth Family Foundation Fund	325,000
Mildred Dixon Holmes - Youth Orchestra Fund	7,366
Hutton Family Fund*	55,391
Kirkpatrick Fund	3,500
Losani Family Foundation Fund	248,940
The Malloch Foundation Fund	19,700
John & Esther Marshall Memorial Fund	11,191
The Martin Foundation Fund	50,000
Mayberry Family Fund*	4,086
McCallum, McBride Fund	32,484
Meredith Family Fund	500
Carolyn & Paul Milne Fund	4,000
Mark & Barbara Nimigan Fund	10,400



Payne Fund	4,380
Pioneer Energy Foundation	157,000
John & Mary Reesor Fund	7,800
Ed Smee Conserver Society Environmental Fund	2,992
Glen & Debra Swire Fund	2,330
Thorne Family Fund	2,000

Tran Family Fund*	2,139
Edith H. Turner Foundation Fund	447,151
Williams Family Fund*	3,214
The Young Fund*	1,520,986
Anonymous	172,400
<b>TOTAL</b>	<b>4,298,087</b>

Grants from scholarship and bursary funds

General Bursary Fund/Genevieve A. Chaney & Cordelia C. Ensign	45,400
Amanda Marie Cowan Memorial Scholarship Fund	1,100
Cowan Family Fund	1,748
CPRS Hamilton Legacy Fund	500
James Darby Bursary Fund	16,000
David Davis Memorial Fund	500
Jeff Dickins Memorial Fund	1,500
Eugene B. Eastburn Fellowship Fund	80,000
Howard Fairclough Organ Scholarship Fund	5,000
Geritol Follies Bursary Fund	6,704
Daniel Giannini Fund	45,000

Christina Hamilton Scholarship Fund	1,303
William Allison Haynes Fund	1,036
Lee Hepner Award Fund	1,500
Mildred Dixon Holmes - Artist of the Year Fund	2,000
Russell & Elizabeth Lindley Fund	7,396
Music Bursary Fund	1,984
Rundle Foreign Study Bursary	2,500
John E. VanDuzer Scholarship Fund	2,000
Albert & Betty Walters Fund	2,590
Jervis B. Webb Company of Canada Scholarship Fund	7,500
Ross F. Webb Bursary Fund	3,073
<b>TOTAL</b>	<b>236,334</b>

Grants from designated funds

Douglas J. Clark Fund*	5,880
Walter & Mildred Danby Fund*	21,922
Frank Charles Miller Fund*	18,008
The Miller Fund	106,682
Phenix Fund for Animal Welfare	5,193
James P. & Mary S. Phin Charitable Fund	9,866

PHOG Endowment Fund	14,286
Eva Rothwell Resource Centre Fund	3,481
Samaritans’ Tithe Fund	12,048
Stoney Creek Health Fund	30,691
United Way Fund/Kenneth R. Walsh	27,030
Anonymous	157,758
<b>TOTAL</b>	<b>412,845</b>

Total grants

Total grants approved	8,038,388
Adjustment for deferred grants	(948,518)
<b>TOTAL GRANTS PAID</b>	<b>7,089,870</b>

Community leadership projects

Leadership project costs include research, community consultation, meeting costs, educational and communication materials.

ABACUS	79,430	Hamilton Roundtable for Poverty Reduction	92,566
Community investing: research, development and education	18,620	Neighbourhood Leadership Institute	78,855
Hamilton Anchor Institution Leadership Table	17,189	Other leadership projects	42,260
Hamilton Revitalization Action Campaign	450,000	<b>TOTAL COMMUNITY LEADERSHIP PROJECTS</b>	<b>778,920</b>

<b>TOTAL GRANTS AND COMMUNITY LEADERSHIP</b>	<b>7,868,790</b>
--	------------------

Grants by recipient organization

This list shows the details of all grants to all organizations in 2015-16. Grants marked with an asterisk are those made from the Board-directed Community Fund or field-of-interest funds. All other grants are from donor-advised or designated funds and reflect the philanthropic interests of those who established the funds.

- In addition to the grants below, the Foundation provided grants totalling:
- \$69,650 to 23 organizations supporting 582 children to attend one week of camp through the Hamilton Spectator Summer Camp Fund
  - \$275,942 to 27 academic institutions and organizations for scholarships and bursaries supporting access to post-secondary education

<b>Adult Community Support Program/</b> <i>Crossfire Assembly</i>	
Get Hip Get Fit 2*	5,000
<b>Advanced Coronary Treatment Foundation</b>	
CPR and defibrillator training program	14,200
Supporting grant	2,000
<b>Advocacy Centre for the Elderly</b>	
Supporting grant	1,040
<b>Alzheimer Society of Hamilton and Halton</b>	
Supporting grant	7,243
<b>Ancaster Community Services &amp; Information</b>	
Frozen meal program*	10,049

<b>Ancaster Society for the Performing Arts Corporation</b>	
Sinfonia Ancaster	8,000
<b>Art Forms/Social Planning &amp; Research Council of Hamilton (SPRC)</b>	
Brushes and Beats*	20,000
Keep the Ball Rolling*	10,000
Markowski exterior historic mural*	5,000
Supporting grant	4,500
<b>Art Gallery of Hamilton</b>	
Children’s programs	2,000
Supporting grant	9,000
Youth council*	10,000

\* Denotes Community Fund or field-of-interest fund grant  
Organizations identified in italics are charitable sponsors for the grant  
Some grants are payable over multiple years



<b>The Arthritis Society</b>		<b>Canadian Institute for Advanced Research</b>		<b>Christ’s Church Cathedral</b>		<b>The Down Stairs Kitchen/Christ’s Church Cathedral</b>	
Supporting grant	2,192	Supporting grant	35,000	Community programs	2,000	Arts and theatre meet at dinner*	4,900
<b>Artscape Foundation</b>		<b>Canadian National Institute for the Blind</b>		<b>City Housing Hamilton</b>		<b>Dr. Bob Kemp Hospice Foundation</b>	
Supporting grant	35,000	Supporting grant	15,000	Hip Hop in Jamesville*	4,982	Supporting grant	31,691
<b>Affiliated Services for Children &amp; Youth (ASCY)</b>		<b>The Canadian Red Cross Society</b>		Team Dignity*	10,000	<b>Dr. J. Edgar Davey School/Hamilton-Wentworth District School Board Foundation</b>	
Read to Your Baby	20,000	Emergency and disaster services and community health and wellness programs	400	<b>City Kidz Ministry</b>		Playground project	1,000
<b>ASHOKA Canada</b>		Supporting grant	588	Supporting grant	21,000	<b>Duet Club of Hamilton</b>	
Supporting grant	35,000	Tiffany Circle	10,000	<b>City of Hamilton</b>		Scholarship awards	1,000
<b>Autism Society of Ontario, Hamilton Chapter</b>		<b>Canadian Warplane Heritage Museum</b>		Books for Hess Street School*	2,059	<b>Dundas Historical Society Museum</b>	
Respite programs and services for caregivers	400	Outreach to schools	5,000	Growing youth leaders in priority neighbourhoods	25,000	Community family festivals*	5,000
<b>Bach Elgar Choir</b>		<b>Cancer Assistance Program</b>		McQuesten Urban Farm	43,800	Expansion project	2,000
Part-time choral administrator*	15,000	Supporting grant	10,000	<b>Coady International Institute-St. Francis Xavier University</b>		<b>Dundas Valley Orchestra</b>	
Requiem, op. 9 by Maurice Duruflé*	5,000	<b>Canine Vision (Dog Guides Canada)</b>		Supporting grant	50,000	Spotlight on Dundas*	5,700
Supporting grant	3,000	Supporting grant	1,000	<b>CoBALT CONNECTS/Players Guild of Hamilton Inc.</b>		<b>Dundas Valley School of Art</b>	
<b>Beasley Neighbourhood Association/Industry Education Council of Hamilton</b>		<b>Carpenter Hospice</b>		SpaceFinder Hamilton*	10,000	Artists’ Connection programs*	13,191
BLINK program	5,845	Building fund	10,000	<b>The Colin B. Glassco Charitable Foundation for Children</b>		Family ART days*	16,500
<b>Bennetto Middle School/Hamilton-Wentworth District School Board Foundation</b>		In memory of Donna Carpenter	200	Supporting grant	60,000	Nurture the Ability	12,000
Supporting grant	3,325	<b>Cathedral High School/Hamilton-Wentworth Catholic District School Board</b>		<b>Community Development Halton</b>		Supporting grant	3,000
<b>Bird Studies Canada (Long Point)</b>		Student emergency needs	2,000	Supporting grant	40,000	<b>Dundas Youth Chaplaincy</b>	
Supporting grant	1,120	<b>CEDAR/Metis Women’s Circle</b>		<b>Community Food Centres Canada</b>		Routes Youth Centre	20,000
<b>Birthright Organization of Hamilton</b>		Bimaadziwin: Youth at risk program*	80,000	Supporting grant	50,000	<b>The Easter Seals Ontario</b>	
Supporting grant	4,000	<b>Central Presbyterian Church</b>		<b>Community Foundation Grey Bruce</b>		Send a Kid to Camp	5,000
<b>Brantford Kiwanis Music Festival</b>		Sound system and organ fund	7,800	Supporting grant	11,548	<b>Elizabeth Fry Society</b>	
Scholarship award	300	Supporting grant	3,946	<b>Community Foundations of Canada</b>		Compassion for the season	1,500
<b>The Bridge from Prison to Community (Hamilton)</b>		<b>Centre3 for Print and Media Arts</b>		National conference - social finance stream	15,000	<b>Elliott Heights Baptist Church</b>	
Supporting grant	5,000	MediaArts[4] Youth	15,000	National conference - attendance support*	2,500	LARCH after-school program	31,000
<b>Bruce Trail Conservancy</b>		<b>Chamber Music Hamilton</b>		Supporting grant	29,943	<b>Empowerment Squared</b>	
Earth Day gala	1,300	Supporting grant	13,000	<b>Community Information Hamilton</b>		Hamilton downtown soccer league*	5,103
Supporting grant	400	<b>Chedoke Health Foundation</b>		Food Access Guide*	5,100	Homework Circle’s Young Scholar program*	160,000
<b>Burlington Community Foundation</b>		Supporting grant	588	<b>Community Living Hamilton</b>		<b>Engineers Without Borders (Canada)</b>	
Supporting grant	20,670	<b>Children’s Aid Society of Hamilton</b>		Supporting grant	294	Supporting grant	50,000
<b>Burlington Humane Society</b>		Christmas hamper program	10,000	<b>Corporation of the County of Bruce</b>		<b>The Equality Effect</b>	
Supporting grant	2,000	Miller Bear Program	3,000	Sauble Beach children’s library	2,500	Supporting grant	50,000
<b>Burlington Museums Foundation</b>		Summer camperships	5,000	<b>Culture for Kids in the Arts</b>		<b>Evergreen</b>	
Supporting grant	10,000	Supporting grant	1,000	After-school arts program	15,000	Supporting grant	50,000
<b>The Calgary Foundation</b>		<b>Children’s Health Foundation</b>		Artasia exhibition presentation*	5,000	<b>Fit Active Beautiful (FAB) Foundation</b>	
Supporting grant	5,000	Supporting grant	15,000	<b>Delta United Church</b>		FAB girls 5K challenge	7,500
<b>Canadian Cancer Society, Ontario Division</b>		<b>Children’s Hospital of Eastern Ontario</b>		Supporting grant	7,000	<b>The Food Bank of Waterloo Region</b>	
Supporting grant	1,575	Supporting grant	18,000	<b>Doctors Without Borders</b>		Supporting grant	15,000
<b>Canadian Cystic Fibrosis Foundation</b>		<b>Children’s Hospital Foundation of Manitoba</b>		Support for Africa	1,000	<b>Food4Kids Hamilton Halton Niagara</b>	
Supporting grant	2,192	Supporting grant	5,000			Summer program	5,000
		<b>Christian Horizons Canada</b>					
		Supporting grant	2,192				



<b>Free the Children</b>		
Supporting grant	131,940	
<b>GALA Community Planning Team/Social Planning &amp; Research Council of Hamilton (SPRC)</b>		
Urban art in beautiful alleys*	5,000	
<b>Good Shepherd Centres Hamilton</b>		
The Market Place’s work experience program	20,000	
Purchase of baby products*	2,170	
Supporting grant	55,311	
Venture Centre	4,000	
Second Stage Services for women	1,500	
<b>Grace Haven (The Salvation Army)</b>		
Comfort and Care	1,000	
<b>Green Venture/Conserver Society of Hamilton &amp; District, Inc.</b>		
EcoStars summer camp	10,000	
RAIN home visits*	8,213	
<b>Habitat for Humanity Hamilton</b>		
Hamilton’s Home Build program	10,000	
<b>Halton Region Conservation Foundation</b>		
Cootes EcoPark land procurement	100,000	
Cootes EcoPark land procurement - matching grant opportunity	150,000	
Supporting grant	3,795	
<b>Halton Women’s Place</b>		
Supporting grant	3,571	
<b>The Hamilton/Burlington Society for the Prevention of Cruelty to Animals (SPCA)</b>		
Care of dogs	2,000	
Supporting grant	5,193	
<b>Hamilton All Star Jazz Band</b>		
Supporting grant	2,000	
<b>Hamilton Artists Inc.</b>		
Exterior arts presentations*	5,000	
<b>Hamilton Arts Council</b>		
Art prize feasibility study	6,750	
LivingArts Hamilton Symposium*	5,000	
<b>Hamilton Association for Residential &amp; Recreational Redevelopment Programs</b>		
St. Peter’s HARRRP	10,000	
Youth Create Saturdays*	5,000	
<b>Hamilton Children’s Choir</b>		
Bursary award*	2,807	
Music Matters*	5,000	
Supporting grant	5,000	

<b>Hamilton Community Legal Clinic</b>		
Healthy housing*	500	
HRPR operations	71,721	
<b>Hamilton Conservation Foundation</b>		
Eco Valley Project	1,000	
Increasing learning opportunities for disadvantaged youth	5,000	
Supporting grant	14,111	
<b>Hamilton District Society for Disabled Children</b>		
Supporting grant	621	
<b>Hamilton East Kiwanis Boys’ and Girls’ Club</b>		
Crown Point educational engagement*	180,000	
Ellis youth project*	7,000	
Enhancements for girls’ programming*	35,000	
Ontario Early Years Centre	2,000	
We Rock camp	4,000	
<b>Hamilton Festival Theatre Company</b>		
Frost Bites*	5,000	
<b>Hamilton Food Share</b>		
Dining and food packages for low income seniors*	10,000	
Supporting grant	55,000	
Support for seniors’ program	5,000	
<b>Hamilton Health Sciences Foundation</b>		
CIBC Breast Assessment Centre	1,000	
McMaster Children’s Hospital	64,000	
Supporting grant	2,000	
<b>Hamilton Literary Festival Association</b>		
gritLIT: Hamilton’s readers and writers festival*	5,000	
<b>Hamilton Music Collective</b>		
An Instrument for Every Child*	46,779	
<b>Hamilton Naturalists’ Club</b>		
Pollinator corridor map	3,000	
Pollinator Paradise	2,992	
Pollinator Paradise at Hess Street School	1,000	
Supporting grant	15,111	
<b>Hamilton Niagara Haldimand Brant Community Care Access Centre</b>		
Supporting grant	1,659	
<b>Hamilton Philharmonic Orchestra (2000) Inc.</b>		
Adopt-a-school	5,000	
Conductor-in-Residence program and community outreach	5,000	

Dundas senior and student programming*	10,500	
Endowment fund with Ontario Arts Council	9,000	
Programs for families and students*	10,000	
Strategic planning 2016-19*	10,000	
Supporting grant	35,143	
<b>Hamilton Philharmonic Youth Orchestra</b>		
Database-to-donors-to-sustainability*	10,000	
No barriers to music education and performance*	5,000	
Supporting grant	7,366	
Taking it to the streets*	5,000	
<b>Hamilton Regional Indian Centre</b>		
Witness Blanket exhibition*	5,000	
<b>Hamilton Right to Life</b>		
Supporting grant	5,000	
<b>Hamilton Sustainable Victory Gardens Inc.</b>		
Supporting grant	1,000	
<b>Hamilton Theatre Inc.</b>		
Hair*	5,000	
<b>Hamilton Youth Poets/Centre3 for Print and Media Arts</b>		
Hamilton Beat*	5,000	
National Team Tour*	5,000	
Saskatchewan performance travel costs	500	
Strength and Growth*	10,000	
Supporting grant	5,000	
<b>Hamilton Youth Poets/Lynwood Charlton Centre</b>		
Louder Than a Bomb - Canadian youth poetry festival*	2,500	
Supporting grant	15,000	
<b>Hamilton-Wentworth Catholic District School Board</b>		
LEAD successful transitions*	150,000	
Physical literacy and school attendance*	30,000	
<b>Hamilton-Wentworth District School Board Foundation</b>		
Hygiene products and toiletries	400	
Photography program at Bennetto School*	3,000	
School-based Health and Wellness Centre	14,500	
Sport hijabs*	3,300	

<b>Healing Arts and Recovery with Peer Support/City Housing Hamilton</b>		
Supporting grant	5,000	
<b>Heart and Stroke Foundation of Ontario</b>		
Supporting grant	2,068	
<b>Hearts Together for Haiti</b>		
Supporting grant	5,000	
<b>Hillcrest Elementary School /Hamilton-Wentworth District School Board Foundation</b>		
Program support	5,000	
<b>Hope for Wildlife Society</b>		
Supporting grant	400	
<b>The Hospital for Sick Children</b>		
Supporting grant	25,466	
<b>Indspire</b>		
Bursaries for Indigenous students	2,000	
<b>Industry Education Council of Hamilton</b>		
Hamilton Code Clubs*	175,530	
<b>Interval House of Hamilton</b>		
Supporting grant	5,000	
Supportive mothering	3,700	
The Hero’s Journey program	10,000	
<b>The John Howard Society</b>		
ACHIEVES*	110,000	
Healthy Community Healthy Youth Flamborough	3,000	
Postcard campaign*	500	
<b>John Laing Singers</b>		
Supporting grant	2,000	
<b>Joseph Brant Hospital Foundation</b>		
Capital campaign	10,000	
Redevelopment and expansion project	50,000	
Supporting grant	1,000	
<b>Jump Math</b>		
Supporting grant	35,000	
<b>Juravinski Hospital &amp; Cancer Centre Foundation/Hamilton Health Sciences Corporation</b>		
Supporting grant	2,000	
<b>Juvenile Diabetes Research Foundation</b>		
Supporting grant	1,000	
<b>The Learning Partnership</b>		
Supporting grant	25,000	



<b>Let’s Talk Science</b>	
Supporting grant	25,000
<b>Living Rock Ministries</b>	
Job coach	10,000
Operation Christmas Blessing	2,550
Rock Experience	17,600
Rock in Action*	7,000
Supporting grant	3,258
<b>Loran Scholars Foundation</b>	
Scholarships	80,000
<b>Lynwood Charlton Centre</b>	
Site development and maintenance project	5,000
Under the Willows	13,000
<b>MacNab Street Presbyterian Church</b>	
Supporting grant	10,036
<b>March of Dimes Canada Non-Profit Housing Corporation</b>	
Jason’s House	4,000
<b>MaRS Discovery District</b>	
Centre for Impact Investment	150,000
Solutions Lab	150,000
<b>Mathstronauts/McMaster University (McMaster Industry Liaison Office)</b>	
Supporting grant	5,000
<b>McGill University</b>	
Supporting grant	2,000
<b>McMaster Smiling Over Sickness/Hamilton Health Sciences Foundation</b>	
McMaster dance marathon	1,000
<b>McMaster University</b>	
Lecture hall naming initiative - Ron Joyce Centre	25,000
McMaster Child and Youth University in the city*	70,000
Museum of Art	2,000
President’s Fund	1,500
Scholarship award	1,300
Sponsorship of Dr. Sabri - McMaster/Hogarth Ophthalmology Clinic Conference	10,000
Stem cell research	2,000
<b>McQuesten Community Planning Team/Social Planning &amp; Research Council of Hamilton (SPRC)</b>	
Supporting grant	1,000
<b>Melrose United Church</b>	
Supporting grant	6,176

<b>Michael Pinball Clemons Foundation</b>	
Supporting grant	5,000
<b>Mission Services of Hamilton</b>	
HOSTS*	80,000
Supporting grant	6,004
<b>Mohawk College</b>	
Bursary in construction trades	1,000
<b>Mountain Secondary School/Hamilton-Wentworth District School Board Foundation</b>	
Holiday dinner and student sponsorship	1,500
<b>Muskoka Conservancy</b>	
Supporting grant	1,000
<b>National Association of Teachers of Singing, Ontario Chapter</b>	
Scholarship award	1,000
<b>National Youth Orchestra</b>	
Supporting grant	1,000
<b>Native Women’s Centre</b>	
Celebrating together	2,200
<b>Navigators of Canada</b>	
Life Change Adventures	2,500
<b>Neighbour to Neighbour Centre (Hamilton)</b>	
Child, youth and peri-natal community food programs	10,000
Jack Parent Tutoring Program	15,000
Kids Can Succeed	1,000
Math Success Program*	50,000
Purchase of baby products*	2,170
Women’s space art expressions*	2,140
<b>New Hope Community Bikes</b>	
Ride Smart school-based cycle education programming*	5,000
<b>New Market Funds Society</b>	
Supporting grant	20,000
<b>New Vision United Church</b>	
Supporting grant	7,760
<b>Niwasa Head Start Preschool</b>	
NYAWEH Elementary*	150,000
<b>No. 9 Contemporary Art &amp; the Environment</b>	
Imagining My Sustainable City: community design and build program	15,000
<b>North Hamilton Community Health Centre</b>	
PATH program*	120,000

<b>Notre-Dame de Perpetual-Secours</b>	
Supporting grant	13,000
<b>Olivet United Church</b>	
Eats ‘n More seniors’ program*	2,000
<b>Ontario Music Festivals Association</b>	
Scholarship award	500
<b>Ontario Registered Music Teachers’ Association - Hamilton/Halton</b>	
Scholarship awards	900
<b>The Owl Foundation</b>	
Supporting grant	1,500
<b>Parkview Church</b>	
Compassion Ministries*	2,000
Furniture program	2,000
<b>Peel Music Festival</b>	
Scholarship award	300
<b>Peoples Community Sports/The Peoples Church</b>	
Suiting up: providing each child with a team shirt and medal*	2,000
<b>Philpott Memorial Church</b>	
Supporting grant	8,769
<b>Phoenix Place</b>	
Christmas party	1,000
I’m Listening	2,784
<b>Plan International Canada</b>	
Sponsored child	1,000
<b>Port Nelson United Church</b>	
Rekindle capital campaign	25,000
<b>Prince’s Charities Canada</b>	
Prince’s Operation Entrepreneur Program	5,000
<b>Pro Bono Law Ontario</b>	
PBLO at McMaster Children’s Hospital	17,700
<b>Remembering Canada’s Heroes</b>	
Canadian history on DVD	1,000
<b>Robert Land Community Association</b>	
Building Community Through Creativity and Artasia*	5,000
Food/breakfast programs at the Eva Rothwell Centre	5,000
Supporting grant	13,981
Trades are the Way*	50,000
Youth entrepreneurs	10,700

<b>Roman Catholic Episcopal Corporation St. Ann’s Parish</b>	
Supporting grant	4,000
<b>Rotary Club of Hamilton</b>	
Telling Tales*	1,500
<b>Royal Botanical Gardens</b>	
Children’s summer programs	2,000
EcoPark System	108,682
Rock garden renewal	5,000
Supporting grant	15,268
<b>Royal Canadian Humane Association</b>	
Supporting grant	3,539
<b>Royal Conservatory of Music</b>	
Learning Through the Arts - Hamilton*	150,000
<b>Rygiel Support for Community Living</b>	
Supporting grant	2,192
<b>Salal Foundation</b>	
Canopy Planet - Boreal Forest	35,000
Canopy Project	75,000
<b>The Salvation Army Hamilton</b>	
Community services food bank*	10,000
Reduce Anxiety and Restore Wellbeing Project	3,000
Supporting grant	20,588
<b>Scientists in School</b>	
Supporting STEM education	12,000
<b>Scleroderma Society of Ontario</b>	
Supporting grant	5,000
<b>Shakespeareience Performing Arts</b>	
The Classroom Shakespeareience	12,000
<b>Shriners Hospitals for Children</b>	
Supporting grant	1,097
<b>Simon Fraser University</b>	
Carbon Talks	25,000
<b>Sir Frederick Banting Legacy Foundation</b>	
Supporting grant	1,000
<b>Sir John A. Macdonald Secondary School/Hamilton-Wentworth District School Board Foundation</b>	
School-based health network*	14,243
Student emergency needs	2,000
<b>Skills for Change of Metro Toronto</b>	
Bridging the Gap*	20,077

**Social Planning & Research Council of Hamilton (SPRC)**

1 in 4*	5,000
Community development*	418,787
McQuesten Urban Farm - community animator	25,000
Needs assessment on LGBTQ community*	2,500
Neighbourhood hub support from Building Momentum event*	20,000
Small grants program*	13,785

**Society of our Lady of the Most Holy Trinity (Canada)**

Supporting grant	22,000
------------------	--------

**St. James Anglican Church**

Syrian refugee sponsorship	15,000
----------------------------	--------

**St. Jerome’s University**

Supporting grant	3,000
------------------	-------

**St. Joseph’s Healthcare Foundation**

Enhancement of family services at West 5th campus	15,000
Supporting grant	21,000
Youth Wellness Centre - empowerment fund	5,000

**St. Joseph’s Home Care**

Supporting grant	22,995
------------------	--------

**St. Joseph’s Villa Foundation**

Construction renovations to wing	5,000
Enhancing the Care	6,000
Supporting grant	27,500

**St. Matthew’s House**

Community closet*	500
Nutritious food for families	5,000
Christmas program	2,000
Supporting grant	12,000

**St. Patrick’s Parish**

Supporting grant	42,000
------------------	--------

**St. Raphael’s Parish Church**

Accessibility project	5,000
Supporting grant	1,000

**Start2Finish**

Running and Reading Club	20,000
--------------------------	--------

**Student Open Circles**

Community volunteer action	10,000
----------------------------	--------

**The Synod of the Diocese of Niagara**

Syrian refugee support	1,200
------------------------	-------

**Tastebuds/Social Planning & Research Council of Hamilton (SPRC)**

Support for school nourishment programs*	65,000
--	--------

**The Stop Community Food Centre**

Supporting grant	26,000
------------------	--------

**Theatre Aquarius**

Building relationships with youth and students	3,000
Supporting grant	30,900
Youth accessibility outreach program*	10,000

**Threshold School of Building**

Job developer	25,200
Supporting grant	10,000

**THRIVE**

Get Ready*	96,690
OASIS program	10,000
Supporting grant	20,000

**Tides Canada Foundation**

The Wellbeing Fund	25,000
--------------------	--------

**Town of Collingwood**

Collingwood Labyrinth Project	20,000
Reconstruction of the Harborview Boardwalk	100,000

**Trent University**

L.E.D. walkway and park lighting	45,660
----------------------------------	--------

**The Tyndale Foundation**

Supporting grant	2,192
------------------	-------

**United Way of Burlington & Greater Hamilton**

Supporting grant	33,605
------------------	--------

**United Way of Oakville**

Supporting grant	10,000
------------------	--------

**University Hospitals Kingston Foundation**

Supporting grant	9,000
------------------	-------

**University of St. Michael’s College**

Supporting grant	5,000
------------------	-------

**University of Toronto**

Supporting grant	1,000
------------------	-------

**Urquhart Butterfly Garden/Conserver Society of Hamilton & District, Inc.**

Summer educational program*	2,800
-----------------------------	-------

**Welcome Inn Community Centre of Hamilton**

Christmas outreach	1,750
The North End Method*	5,000
The power of good food	15,300

**Wellwood Resource Centre of Hamilton**

Kids in the Kitchen/Power-up	5,000
Projects/initiatives pertaining to ovarian cancer*	5,397
Strategic initiatives for young people living with cancer/serious illness in the family	3,000

**Wesley Urban Ministries**

Christmas giving	2,000
Fuel Zone*	5,700
Middle Eastern refugee support	6,000
Middle school program*	110,000
Supporting grant	16,404
Syrian refugee support	18,000

**Wever CORE/Rotary Club of Hamilton Sunshine Fund**

Boys basketball, Syrian refugee children welcome event and Creative Vision Cares project	14,000
Community Christmas	2,500
Creative Vision Cares	500
Supporting grant	3,258
WAMM (Wever and MoMac)*	24,000
WAVE after-school program*	25,061

**Wilfrid Laurier University**

Laurier Brantford YMCA capital campaign	250,000
---	---------

**Workers Arts & Heritage Centre**

deLight - Hamilton’s light festival*	1,367
March break arts camp*	5,670
Pride of Place - marketing	
Beasley’s heritage*	500
School visits program	1,000

**YMCA of Hamilton/Burlington/Brantford**

Camp Wanakita	25,075
Camp Wanakita bursary	1,000
Disadvantaged youth	5,000
Laurier Brantford YMCA capital campaign	250,000
Peace Medal Breakfast	4,000
Senior Beyond the Bell*	170,000
Summer Beyond the Bell	10,000

**YWCA Hamilton**

Arts initiative for women in transitional housing	2,600
Business plan for social enterprise*	2,395
Family swimming program*	4,000
Art club	2,500
Transitional housing intake coordinator	2,500
Transitional Living project*	28,938
Young women’s advisory council	5,000



# Impact investing

Hamilton Community Foundation's principal impact investing goal is to align more of our assets with our mission to drive positive change. In 2015-16, HCF's Board of Directors made significant steps toward this goal.

## 20 by 2020

Last fall, following a five-year impact investing pilot, the Board established a target of investing 20 percent of the Foundation's assets in impact investments by 2020. To achieve this "20 by 2020" goal while providing returns that ensure long-term financial stability, HCF will employ a mix of strategies aligned with priorities that include a preference for local investments, balanced with national/global investments to provide a diversified portfolio. Focus areas for impact investment include education, affordable housing, youth, health, employment and other areas that align with granting priorities. The Foundation's next steps will be to assess opportunities, investment criteria, local and national partnerships and measuring and reporting on social impact.

## Responsible investing

Recognizing that all investments, including public market investments, have a social or environmental impact that can be positive or negative, the Foundation is deepening its examination of its public market portfolio

holdings. Again, building on its five-year pilot with an "ESG" portfolio where environmental, social and governance practices are an important part of investment considerations, in 2015-16 the Board undertook an audit of its current traditional public market portfolios. The audit was conducted by Sustainalytics, global leaders in helping investors to develop and implement responsible investment strategies.

Audit results identified that portfolios under the direction of each of HCF's three investment managers were outperforming benchmarks for ESG performance. This demonstrates that HCF's portfolios comprise companies with a "stronger than average preparedness to manage material, environmental, social and governance risks." The Foundation will be working with its investment managers, who are all signatories to the United Nations Principles for Responsible Investment, to determine next steps in the evolution of our investment policy.

## Hamilton Community Investment Fund

Locally, the Hamilton Community Investment Fund offers loans to charities and non-profits, thereby "recycling" capital for community use. A breadth of local organizations continue to benefit from financing from this fund, including the Mustard Seed Co-op, the Cootes



**The Trillium Mortgage combines with conventional financing to provide housing affordability for families.**

Concept for 70 new townhomes.

to Escarpment EcoPark System, and Indwell. Most recently, the fund has approved a loan to Trillium Housing Non-Profit to develop a project that will deliver housing affordability in Hamilton.

Trillium Housing has acquired a three-acre site in the city where it will develop approximately 70 townhouses. The organization develops units at the entry level of the local market and provides greater affordability through the Trillium Mortgage. The Trillium Mortgage combines with conventional financing to create affordable financing that enables a

family to buy a home. The Trillium Mortgage is payment-free until discharge — it's like Trillium Housing owns a piece of the home so that it is more affordable for the family. The value of each Trillium Mortgage is based on each income-eligible purchaser's individual circumstance.

The innovative Trillium Housing model uses a partnership structure to create impact investment opportunities that deliver financial return and housing affordability without the need for government subsidy.

# Financial highlights

## HCF is pleased to provide financial highlights for the year ended March 31, 2016

Through the continued generosity of our donors, the Foundation received donations of \$11.6 million this year. Annual grants and community leadership projects reached a historical high of \$7.9 million. Following three strong years, the financial markets retreated into negative territory, generating a -0.1% return for the year and bringing the 10-year annualized return to 6.0%. Our reserves, which enable us to continue to grant and maintain operating capacity when the market is weak, remain at their policy maximum. We continue to proceed on diversifying our investments through alternative investment strategies, including impact investment commitments which align more of our assets with our mission. We are pleased with the growing interest in the Hamilton Community Investment Fund that provides loans to local charities and not-for-profits. Our Board of Directors has also undertaken an environmental, social and governance (ESG) audit of our public market portfolios to gain further insight into our holdings. The Board will be continuing its own education on ESG and our portfolio to determine if HCF requires an amendment to its overall investment policy.

The 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 <http://www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html>

(\$000's)	2016	2015	2014
Total assets	182,388	179,998	155,844
Investments at market*	172,875	174,181	153,366
Investment returns:			
One year	-0.1%	14.5%	17.7%
Five years	9.2%	11.2%	12.1%
Ten years	6.0%	7.0%	6.7%
Funds balance			
Endowed funds	136,138	126,416	118,062
Restricted funds	34,668	43,266	28,374
Operating funds	43	47	52
Total HCF funds balance	170,849	169,729	146,488
Funds held on behalf of other parties	10,206	9,404	8,315
Donations received	11,631	12,604	6,557
Grants and community leadership	7,869	6,364	6,456
Loans outstanding to local charities and not for profits**	2,562	1,480	339
Operating expenses	2,256	2,204	2,149
As a % of average total assets	1.2%	1.3%	1.5%

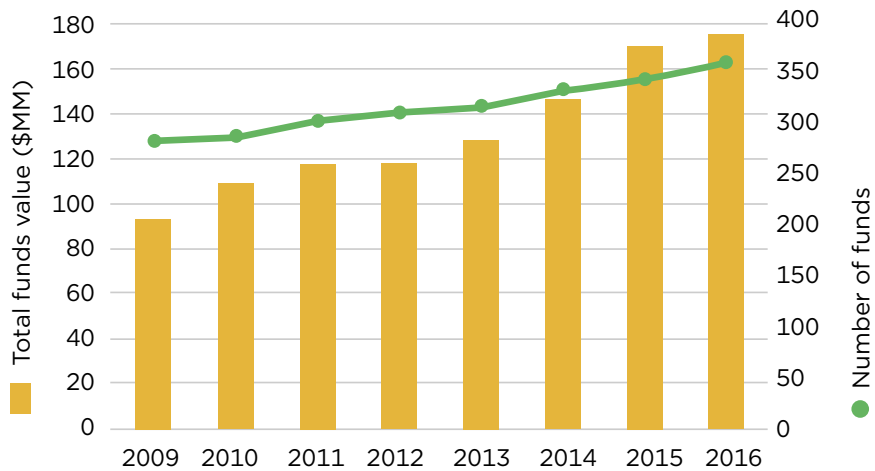
\* In addition, HCF assets at March 31, 2016 include alternative investments recorded at cost and loans receivable related to the Hamilton Community Investment Fund totalling \$8,358,000. (2015-\$4,976,000)  
\*\* Includes loans directly from our Hamilton Community Investment Fund and HCF's lending partner, the Community Forward Fund.

## Total assets

Hamilton Community Foundation's total assets of \$182 million at March 31, 2016 include HCF funds balance and funds held on behalf of third parties at \$10.2 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 and grant from investment earnings. Flowthrough funds are fully distributed as grants over a pre-determined term.

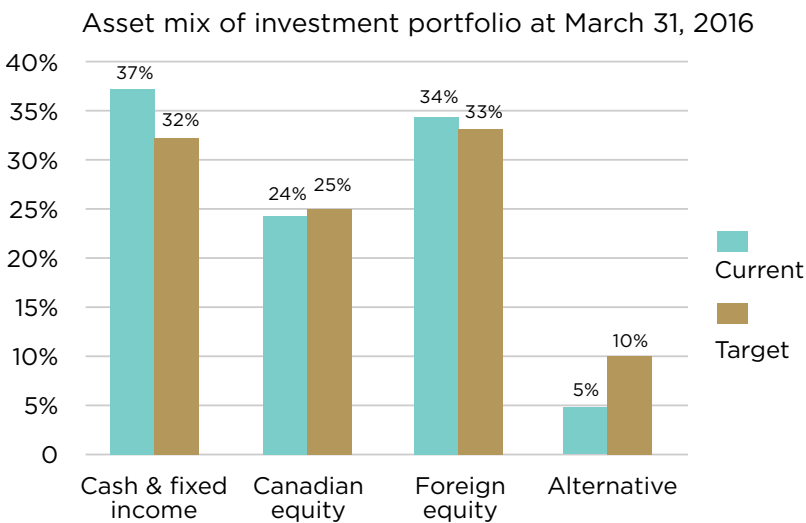


The funds balance has grown 83% from \$94 million in 2009 to \$171 million at year-ended March 31, 2016. The funds balance eroded in 2009 when donations did not offset the impact of worldwide investment market declines. Flat investment returns in 2016 also muted the growth of funds with only a 1% growth in spite of close to \$12.0 million in new donations in the year. The number of funds has grown 26% to 360 from 285 in 2009.

## Investments

Investments 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.

To provide a more diverse and robust portfolio, HCF has committed to investing in alternative asset classes including real estate, infrastructure and private equity. These alternatives are consistent with the Foundation's long-term investment horizon and liquidity requirements. Since these investments are not actively traded, they are valued at cost on the financial statements. In addition, the Hamilton Community Investment Fund (HCIF), which provides loans to local charities and not-for-profits, is reflected at cost in the investments. Current loans outstanding total \$2.6 million and include those made directly from HCIF and through our partner, the Community Forward Fund.



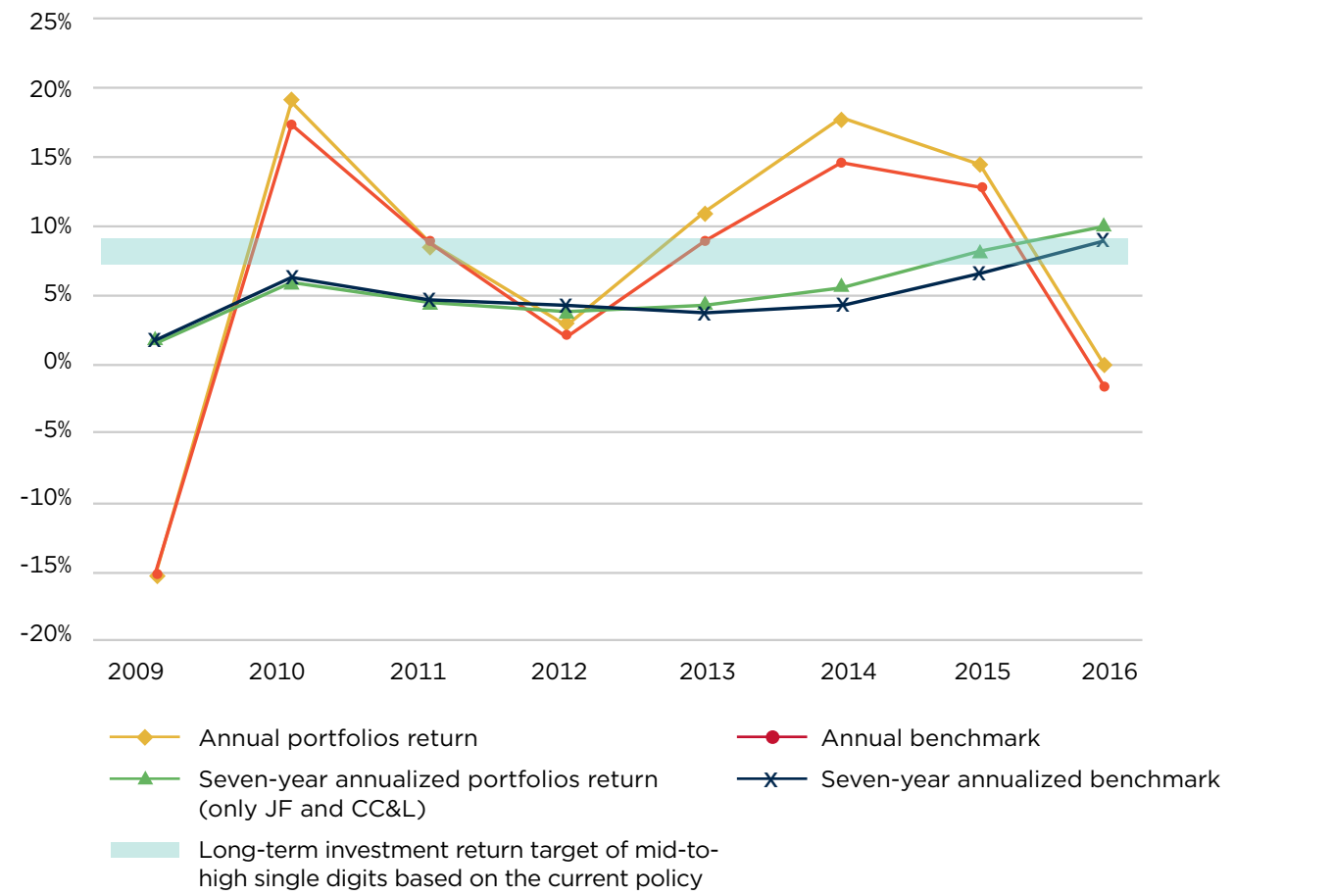


Our public market portfolios are invested according to investment policy guidelines established by HCF’s Board of Directors. The portfolios are managed by three professional investment managers in accordance with the policy, and are overseen by the Board’s Finance and Investment Committee. As an endowment builder, HCF’s policy focuses on long-term investing and this position is supported by developing and maintaining reserve accounts which are currently at their policy maximum. This committee reviews the investment managers’ reports quarterly to assess each manager’s performance. In addition, the committee formally evaluates the investment managers’ performance semi-annually. 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

- The following 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 return rates against the targeted investment policy long-term return 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. After three consecutive years of strong returns, 2016 returns were nominally negative at -0.1%, but were better than the benchmark of -1.3%. The investment results were negatively affected by drop in the price of oil, exchange rate volatility, global unrest and terrorism and concern surrounding economic growth in China. The seven-year annualized return at 10.2% exceeds target investment policy range and as noted in the financial highlights, the current 10-year annualized return of 6% is at the lower end of the target range and reflects the challenging market conditions over the past decade.

Due to the long-term nature of the alternative investments, their returns are not included in this analysis. Results for these investments are continually monitored.

Investment returns include:	2016	2015
Interest and dividends	\$7,200,036	\$5,635,699
Realized gains on sale of investments	6,497,311	7,333,221
Unrealized (losses) gains	(13,314,073)	8,004,945
	383,273	20,973,865
Add/(Deduct):		
Investment fees	(794,227)	(645,228)
Investment loss (income) allocated to funds held on behalf of third parties	23,715	(1,125,264)
	(\$387,238)	\$19,203,373

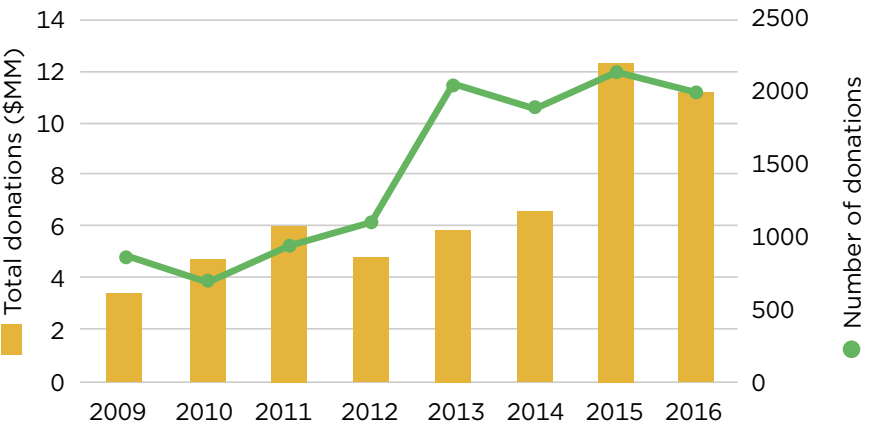
The unrealized gains (losses) reflect market volatility which affects the year end market value of our portfolio.

Donations

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

Total annual donations have ranged from \$3.4 to \$12.4 million over the past eight years.

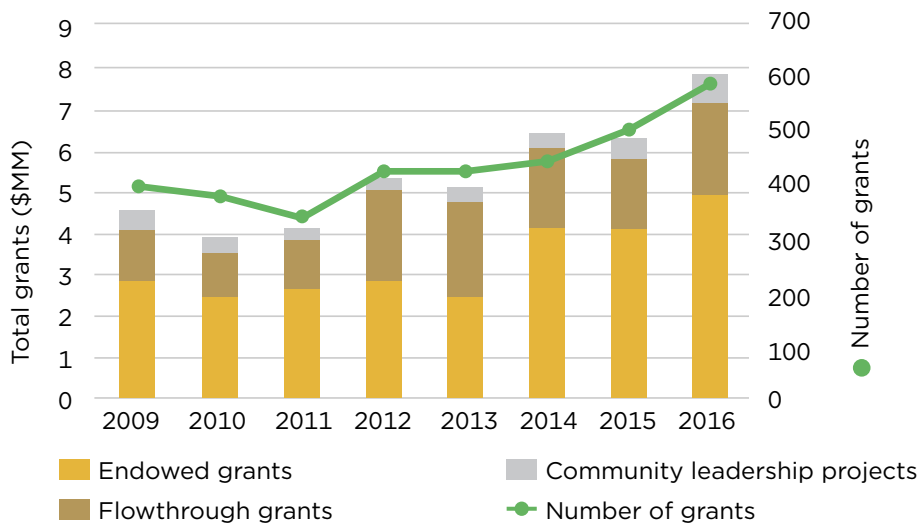
Included in this year’s donations is the \$5.0 million transfer of the Chedoke Health Foundation to HCF. The number of donations received reached a historical high at 2,146 in 2015 and continues to be significantly higher since 2013 based on the number and nature of donor-sponsored events to raise money for their funds as well as the number of “in memoriam” donations received.



# Grants and community leadership

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

Grants and community leadership projects spending over the past eight years have ranged from \$4.0 million to a historic high of \$7.9 million this year. Granting has increased as a result of the Foundation’s increased asset base as well as from a 0.5% increase in the annual grant spending rate to 4.0% for the year ended March 31, 2016. 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 4.0% of the fund balances), and b) resulted in less income available to grant. Flowthrough granting has ranged from 25% to 45% of total granting in any given year and is dependent on the timing and nature of flowthrough donations.

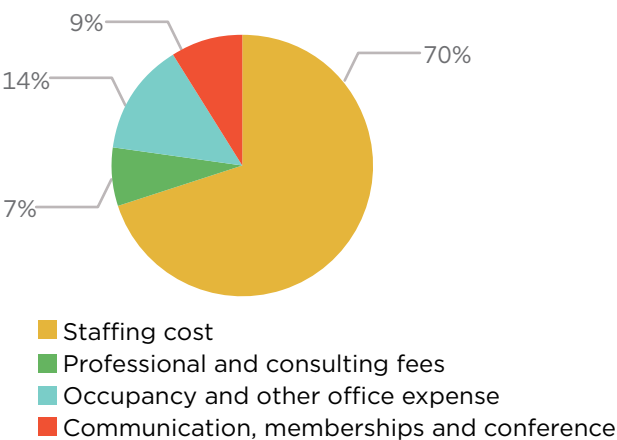


## Operations

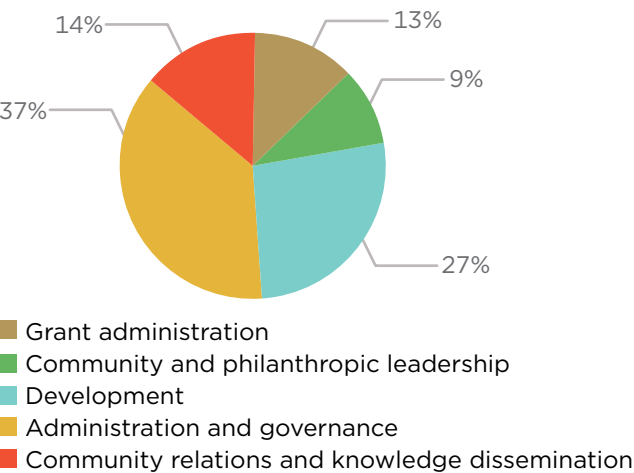
Operating expenses for the fiscal year ended March 31, 2016 total \$2.3 million, an increase of 2.3%. Staffing costs related to the Foundation’s 17 employees represent 70% of HCF operating costs.

In addition to breaking out costs 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 14. It also includes fostering the growth of philanthropy by sharing staff time and knowledge to support other charities. Leadership costs include time and facility contribution to the Hamilton Roundtable for Poverty Reduction for five months. The Roundtable sponsorship transferred to Hamilton Community Legal Clinic effective August 1, 2015.

Fiscal operating expenses by category



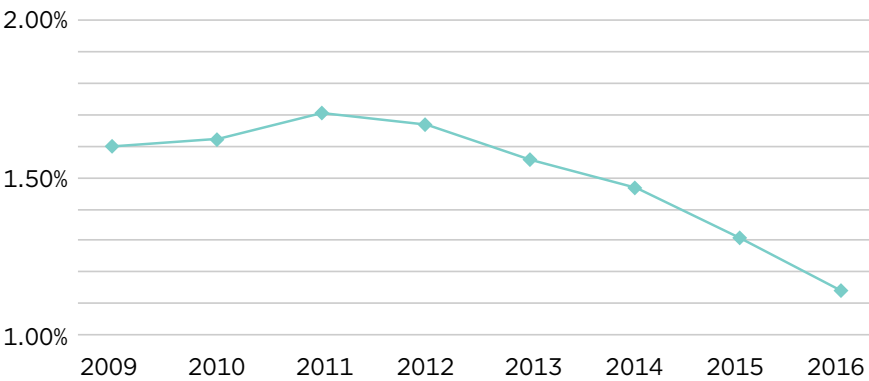
Fiscal operating expenses by operating area



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 1.2% (1.3% in 2015) to be within an acceptable range for a foundation of HCF’s size and stage compared with benchmarks established in the community foundation sector.

Operating expenses as a % of total assets





# Board members, volunteers and staff

## Board Advisory Committees 2015–16

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. Standing committees of the board include: Governance & Board Effectiveness, Development, Finance & Investment, and the Impact Investment Advisory Committee.

**Audit Committee**

Mario Frankovich, MBA, CFA, *Chair*  
Cameron J. Beatty, CPA, CA  
Steve Borsellino, CMA  
Paul Lee-Chin, BA (Econ)  
Bob Savage

**Chaney-Ensign Bursary Fund**

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

**Community Fund**

Suzanne Brown  
Tyler Cowie  
Dr. Juliet Daniel  
Angela Dawe  
Milé Komlen  
Teresa Smith  
Marita Zaffiro, BScPhm, MBA

**Community Health, Education and Research Fund**

Dr. Bill Evans, *Chair*  
Paul Armstrong  
Dr. Jane Aronson  
Marion Emo  
Dr. Gianni Parise

Dr. Jenny Ploeg

Dr. Leila Ryan

**Advisory Committee on Diversity and Inclusion**

Milé Komlen, *Chair*  
Dr. Jane Aronson  
Laura Cattari  
Matthew Green  
Anju Joshi  
Dr. Carolyn Rosenthal

**Edith H. Turner Foundation Fund**

Renate Davidson, *Chair*  
Dorothy Bartalos  
Timothy Bullock  
Sondra Cornett

**Finance & Investment Committee**

Marita Zaffiro, BScPhm, MBA, *Chair*  
Bob Savage, *Vice-Chair*  
Dr. Justin Cooper  
Dr. Bill Evans  
Paul Lee-Chin  
Tom Marlor  
Sarah Murphy  
Gwyn Williams

**Geritol Follies Performing Arts Bursary Fund**

Kathy Brown, *Chair*

Joe Carscadden

Harold Siroonian

**Hamilton Spectator Summer Camp Fund**

Jane Allison

**Impact Investment Advisory Committee**

Marita Zaffiro, BScPhm, MBA, *Chair*  
Bob Savage, *Vice-Chair*  
Tyler Cowie  
Paul Gibel, FCPA, FCA  
Steve Kulakowsky  
Paul Lee-Chin, BA (Econ)  
Tom Marlor  
Brian Underdown, PhD  
Bill Young Jr. (Advisor)

**McCallum, McBride Fund Advisory Committee**

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

**Nomination Committee**

Dr. Justin Cooper, *HCF Past Chair/Committee Chair*  
Anne Bermingham, *Chair, United Way of Burlington & Greater Hamilton*  
Mayor Fred Eisenberger, *City of Hamilton*

Brent Foreman, *HCF Board Chair, Hamilton Community Foundation*  
Acting Police Chief Eric Girt, *Hamilton Police Service*  
Kirsten Hughes, *President, Hamilton Law Association*

Vasudha Seth, *Chair, Hamilton Chamber of Commerce*  
Dr. Gary Warner, *Member-at-Large*  
Pat Wright, *Member-at-Large*

**Ontario Endowment for Children & Youth in Recreation**  
Paul Lee-Chin, *Chair*  
Deb Clinton  
Elizabeth Duvall  
Melissa Ricci  
Kelly Scott

## Board of Directors 2015–16

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

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

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

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

**Dr. Juliet Daniel**  
*Professor, Department of Biology, McMaster University*

**Dr. Bill Evans**  
*Professor Emeritus, Dept. of Oncology, McMaster University*  
*President, Oncosynthesis Consulting Inc.*

**Anju Joshi**  
*Associate (Teaching) Professor, Department of Health, Aging & Society, McMaster University*  
**Milé Komlen**  
*Director, Human Rights & Equity Services, McMaster University*

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

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

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

**Bob Savage**  
*VP, Manufacturing, ArcelorMittal Dofasco (retired)*

**Teresa Smith**  
*President, Hamilton General Hospital*

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

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

## Staff

As at March 31, 2016

**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*

**Sharon Charters**  
*Manager, Grants*

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

**Sarah Glen**  
*Manager, Community Initiatives*

**Jill Anderson**  
*Advisor, Philanthropic Services*

**Celeste Licorish**  
*Advisor, Philanthropic Services*

**Morag Halsey**  
*Receptionist/Foundation Support Assistant*

**Tami Henderson**  
*Administrative Assistant, Grants*

**Melissa Klaver**  
*Executive Assistant, President & CEO*

**Angel Li**  
*Junior Accountant*

**Rose Taylor-Weale**  
*Administrator, Philanthropic Services*

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

**Yvonne Yeoh**  
*Administrative Assistant, President & CEO/Finance & Operations*



# Volunteers 2015-16

As at March 31, 2016

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

Lori Dessau Tauber  
Shendal Yalchin

Terry Yates, FCPA, FCA  
Bill Young Jr.

Sincere thanks to the Mohawk College faculty, community partners and NLI alumni who co-facilitate the learning sessions within the NLI’s resident stream:

Melissa Adams  
Maria Antelo  
Sharon Charters  
Lynn Coleman  
Rebecca Costie  
Alexander Djordevic  
Cole Gately  
Holly Gibson

Susan Goodman  
Ruth Greenspan  
Jaclyn Hall  
Tony Lemma  
Sarah Merritt  
Jude Mersereau  
Fatima Mesquita  
Rod Nettagog

Yohana Otite  
Carol Priamo  
Nancy Reyes  
Steve Rowe  
Katie Stiel  
Sarah Wakefield  
Renee Wetselaar  
Pat Wright

## Advisors

**Auditors**  
BDO Canada LLP

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

**Solicitor**  
ESB Lawyers LLP

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

A PARTNER IN HAMILTON’S FUTURE

We are privileged to work with the talented staff and volunteers of Hamilton Community Foundation and are proud to support their efforts in planning for the future needs of Hamilton.

MIKE DOWNS, CIM, CFA  
Senior Vice President  
Tel: 416-869-7828  
mikedowns@cclgroup.com

CONNOR, CLARK & LUNN  
PRIVATE CAPITAL







**HAMILTON  
COMMUNITY  
FOUNDATION**

120 King St. W., Suite 700, Hamilton, ON L8P 4V2  
905.523.5600 | Fax 905.523.0741  
[www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca)  
[info@hamiltoncommunityfoundation.ca](mailto:info@hamiltoncommunityfoundation.ca)

Charitable number: 13052 7427 RR0001