



helping good people
do great things
in their community

2009
ANNUAL REPORT

NIAGARA
COMMUNITY FOUNDATION

OUR VISION

Realizing community dreams through philanthropy.

OUR MISSION

The Niagara Community Foundation is a charitable public foundation dedicated to improving the quality of life in Niagara through building endowment funds, providing grants and enabling philanthropic partnerships.

OUR GUIDING PRINCIPLES

ENABLE, COLLABORATE AND TRANSFORM:

Enable community improvement by providing funding and community knowledge. Bring organizations together to form partnerships based on the respective strengths of each organization to focus on key community priorities.

DEMONSTRATE PHILANTHROPIC LEADERSHIP:

Demonstrate expertise and best practice in philanthropic leadership.

PUT NIAGARA FIRST:

Communicate and support the Niagara story. Build community leadership. Seek and develop individuals who will bring leadership to the community.

BE TRUSTWORTHY AND TRANSPARENT:

Engage in practices that are open, accessible, fair, objective, flexible, timely and built on a foundation of respect, trust, integrity and honesty.

ENSURE SOUND GOVERNANCE AND MANAGEMENT: Ensure that the Niagara Community Foundation governance and management is sound, relevant and realizes its full fiduciary responsibility.

Cover photo – Visit our website to read more about Nicholas Prestia, and how he asked friends and family attending his ninth birthday party to donate to the Niagara Community Foundation in lieu of birthday gifts.

WEATHERING THE ECONOMIC STORM



Liz Palmieri
Executive Director



Brad Hutchings
President

We started 2009 with much uncertainty. Markets were down, foundations across Canada were reducing or even eliminating payouts and Niagara's economy was significantly affected by the economic downturn.

Given how these external factors could and were effecting our work, the board held a special retreat early in 2009 to recalibrate our strategic plan. From this retreat came three key strategies: focus our granting on four areas (poverty reduction, environment, children and youth and providing assistance to agencies through these challenging times), place a higher priority on securing non-endowed donations that could be re-granted during the year, and, identify a unique community leadership role for the foundation.

As the year came to an end we were pleased to report that over half a million dollars was distributed as grants, which included over \$125,000 in poverty reduction initiatives. This was the 2nd highest amount in our 10 year history. These grants came from interest and dividend income on our endowment in combination with non-endowed donations from many donors.

The board also approved launching a pilot program in 2010 called "Change the Game", where we will work with ten mid-sized voluntary organizations in helping them identify new ways of working together – mainly from a back-office or infrastructure perspective.

As we launched our 10th anniversary year in November, we were thankful for the support and encouragement from our many donors, volunteers, supporters and staff. Anniversaries, especially those that mark decades, give us those formal opportunities to thank, to reflect and to acknowledge. Our vision of "realizing community dreams through philanthropy" is evident through the generosity that the current generation has given to the future, has given to Niagara. We thank you all for your generosity.

Brad Hutchings
President

Liz Palmieri
Executive Director

GRANTS ENABLE COMMUNITY DREAMS

COLLABORATION WILL AID NEW CANADIANS

A new umbrella organization, Niagara Multicultural Services, was recently formed to allow Niagara's multicultural organizations to work together more collaboratively. A grant from the Niagara Community Foundation supported this new initiative by funding a strategic planning session involving representatives of the Folk Arts Council of St. Catharines, the Fort Erie Multicultural Centre, the Multicultural Network of Niagara Falls and the Welland Heritage Council and Multicultural Centre.

"The multicultural organizations in Niagara were very pleased to get the support of the Niagara Community Foundation to have a strategic planning day with all of the Boards and key management staff, for the first time in the history of multicultural centres," explains Claire Masswohl, CEO of Niagara Multicultural Services of Welland and Niagara Falls.

The session resulted in the design of the collaborative approach to service delivery, along with development of a mission and vision statement and a list of key strategic thrusts to work on. The strategy developed by the group will allow each agency to remain an individual entity, while working with the others to ensure seamless and effective services to immigrants and New Canadians across the Region. *

ASSISTING NIAGARA'S JOB SEEKERS

Entering or re-entering the multi-generational workplace of today brings with it inherent challenges – challenges which are magnified for marginalized populations. A consortium of community based partner agencies, the Niagara Resources Network, identified the need for a free, appropriate resource available to guide and equip these workers to navigate in this changed environment.

The Niagara Community Foundation provided a grant to this group to develop a guide to be used by participants at their employment centres across the Region. The guide is specifically designed to help workers who are laid-off, dissatisfied, over-qualified, or returning to work, as well as newcomers to Canada and aboriginal workers, via case studies, suggested solutions, and inventories of support services.

According to Margaret Maynard, Executive Director of Literacy Council of Niagara West, the grant was "definitely a case where a little produced a lot. A small infusion of funding provided by the Foundation allowed a representative group of eight Niagara employment and literacy service providers to develop and produce 10,000 copies of a much-needed resource to assist the jobseeker in Niagara." *

Theatre you never
outgrow



GUIDING LOCAL THEATRE ALONG THE WAY

Carousel Players, a professional theatre company that produces entertaining and inspiring plays for young audiences, tours its work into schools and theatres, inspiring creativity and stimulating the imagination of thousands of children.

One of the challenges inherent in this touring activity is navigating the company's vans, carrying stage managers and actors, to the locations of over 60 schools within the Niagara Region and as far afield as Pittsburgh. A grant from the Niagara Community Foundation provided two GPS navigation systems for Carousel Players' touring productions of Bluenose and George and Martha.

"By the end of this season, we will have toured to 101 schools (16 schools outside of Niagara), performing to over 23,000 children," says Jane Gardner, General Manager. "The GPS units we purchased are invaluable tools to navigate from our St. Catharines base to school gyms all over southwestern Ontario. We now have voice directional step by step directions on how to get to schools, gas stations and restaurants, and the perfect touring tool on the road."

GRANT GPS NAVIGATION SYSTEMS

AMOUNT \$500

ORGANIZATION CAROUSEL PLAYERS



TOY PURCHASES SUPPORT CHILDREN OF TEENS

Providing a stimulating environment for the children of teens via quality child care is just one of the ways that Adolescent's Family Support Services Niagara (AFSSN) is dedicated to ending the cycle of teen pregnancy and the poverty associated with it. The largest program supporting adolescent parents in the Niagara region, AFSSN fosters the independence of young families pursuing an education, and provides child care at several sites throughout Niagara.

The Niagara Community Foundation provided a grant to purchase toys and equipment for these child care sites. From bicycles to blocks, and dolls to puzzles, the toys will stimulate cognitive, fine and gross motor skills, math and reading readiness skills, and promote healthy physical activities. The toys will be used to enhance a program that supports 110 children.

"AFSSN's childcare centres and CAPC Niagara Brighter Futures centres are able to rotate toys and equipment between sites to facilitate optimal learning opportunities for our children and families," said Stacy Wilcox, Supervisor at the Welland Parent Child Centre. "We greatly appreciate the Niagara Community Foundation's support, assisting AFSSN to deliver high quality interactive education."

GRANT ENHANCING INTERACTIVE EDUCATION

AMOUNT \$5,000

ORGANIZATION ADOLESCENT'S FAMILY SUPPORT
SERVICES NIAGARA

2009 GRANTS AWARDED

COMMUNITY, MINI AND YOUTH GRANTS

Adolescent's Family Support Services	\$500
Adolescent's Family Support Services	\$5,000
Alcohol Babies Anonymous	\$500
Alzheimers Society	\$3,387
Bethlehem Not-for-Profit Housing Projects of Niagara	\$6,128
Big Brothers Big Sisters of Fort Erie	\$4,000
Brock University	\$500
Canadian Red Cross-Niag.Area Branches	\$4,220
Carousel Players	\$500
Community Care of St. Catharines and Thorold	\$6,650
Community Living - Port Colburne Wainfleet	\$3,000
Folk Arts Council of St. Catharines	\$6,500
Fort Erie Arts Council	\$5,000
Fort Erie Public Library	\$4,000
Foundation of Resources for Teens	\$500
Friends of Fort Erie Creeks	\$500
Goodwill Industries Niagara	\$1,500
Hannah House Maternity Home	\$1,404
Head Injury Association of Fort Erie	\$500
Literacy Link Niagara	\$500
Lupus Foundation of Ontario	\$2,300
Mainstream An Unsheltered Workshop	\$2,500
Niagara Child & Youth Services	\$500
Niagara Historical Society	\$4,900
Niagara Region - Public Health	\$2,500
Niagara Region Sexual Assault Centre	\$500
Pelham Cares	\$500
Project S.H.A.R.E. of Niagara Falls Inc.	\$500
Regional Niagara Firefighters Volunteer Buffs Association	\$500
Schizophrenia Society of Ontario	\$100
South Niagara Life Centre	\$500
St. Catharines & District Arts Council	\$500
Niagara Resource Service for Youth	\$2,500
St. John Ambulance Lincoln County Branch	\$500
Start Me Up Niagara	\$500
RiverBrink Art Museum	\$500
Salvation Army	\$500

Thorold Community Activities Group	\$2,226
Westview Christian Fellowship	\$6,120
YWCA Niagara Region	\$7,000

STRATEGIC INITIATIVES GRANTS

Brock University.	\$5,000
Canadian Tire Jumpstart	\$6,273
Education Foundation of Niagara	\$5,000
Niagara College	\$5,000
Port CARES	\$3,292
Niagara Resource Service For Youth	\$16,000
United Way of South Niagara	\$19,000
YMCA of Niagara	\$6,705

SUN MEDIA NIAGARA PUBLISHING GROUP CHILDREN'S SUMMER CAMP GRANTS

Autism Society of Ontario	\$1,000
Carousel Players	\$750
City of Welland	\$2,000
Community Living - Fort Erie	\$750
Community Living - Grimsby, Lincoln and West Lincoln	\$750
Community Living - Port Colburne Wainfleet	\$750
Community Living - Welland Pelham	\$750
I.C.A.N.T.E.R.	\$700
Niagara Symphony Association	\$700
Port CARES	\$850
Powerhouse Project	\$2,000
Red Roof Retreat	\$1,000
Salvation Army Community & Family Services - Niagara Falls	\$600
Thorold Community Activities Group	\$550
Town of Pelham	\$820
YMCA of Niagara	\$3,000
YMCA of Niagara (with FACS)	\$2,000
YWCA Niagara Region	\$1,000

2009 GRANTS AWARDED

DONOR DIRECTED GRANTS

Alzheimers Society	\$715	Knox Presbyterian Church	\$21,000
Arthritis Society	\$308	Land Care Niagara	\$402
Autism Society of Ontario	\$1,000	Lincoln Agricultural Society	\$1,556
Bethlehem Not-for-Profit Housing Projects of Niagara	\$9,000	Lincoln Community Against Violence	\$2,100
Big Brothers Big Sisters Grimsby, Lincoln, West Lincoln	\$4,200	Lincoln County Humane Society	\$715
Boys & Girls Club of Niagara	\$910	Lincoln Public Library - Fleming Branch	\$6,000
Brock University	\$1,000	Literacy Council of Niagara West	\$900
Canadian Cystic Fibrosis Foundation	\$681	Lundy's Lane Historical Museum	\$2,500
Canadian Psychiatric Research Foundation	\$262	Mayholme Foundation	\$19,454
Canadian Red Cross-Niagara Area Branches	\$616	McGill University	\$500
Child Advocacy Centre Niagara	\$1,537	Multiple Sclerosis Society of Canada	\$715
Child Advocacy Centre Niagara	\$3,000	Muscular Dystrophy Canada	\$9,646
Chorus Niagara	\$9,000	Newark Neighbours	\$500
Chorus Niagara	\$1,200	Niagara Actions for Animals	\$715
Church of Christ	\$50,000	Niagara Artists' Company	\$300
Church of the Transfiguration	\$5,000	Niagara College	\$500
City of Niagara Falls	\$2,000	Niagara College Foundation	\$1,347
CNIB Ontario Division - Niagara Branch	\$715	Niagara College Foundation	\$1,000
Community Care of St. Catharines and Thorold	\$390	Niagara Falls Big Brothers Big Sisters	\$380
Community Care of St. Catharines and Thorold	\$215	Niagara Falls Humane Society	\$1,063
Community Care of St. Catharines and Thorold	\$500	Niagara Falls Humane Society	\$500
Community Care of West Niagara	\$5,400	Niagara Foundation for Family and Children's Services	\$707
Community Living - Grimsby, Lincoln and West Lincoln	\$900	Niagara Foundation for Family and Children's Services	\$324
Conseil Scolaire de District Catholique	\$600	Niagara Foundation for Family and Children's Services	\$806
Conservation Niagara Foundation	\$402	Niagara Foundation for Family and Children's Services	\$1,000
Cornell University	\$500	Niagara Health System Foundation	\$324
District School Board of Niagara	\$265	Niagara Historical Society	\$500
Doctors without Borders	\$616	Niagara Life Centre	\$6,430
Dog Guides of Canada	\$715	Niagara Peninsula Children's Centre	\$616
Education Foundation of Niagara	\$1,296	Niagara Peninsula Conservation Foundation	\$2,100
Engineers Without Borders	\$768	Niagara Region Sexual Assault Centre	\$715
Fort Erie Conservation Club	\$398	Niagara Region Sexual Assault Centre	\$230
Friends of Fort Erie Creeks	\$353	Niagara Symphony Association	\$9,000
Gillian's Place	\$715	Niagara Symphony Association	\$1,200
GNGH Foundation	\$1,000	Niagara Youth Orchestra	\$2,100
Goodwill Industries Niagara	\$6,000	Ontario Lung Association	\$616
Heart and Stroke Foundation of Ontario	\$715	Open Arms Mission	\$6,430
Heart and Stroke Foundation of Ontario	\$308	Osteoporosis Society of Canada	\$715
Heart Niagara Inc.	\$500	Project S.H.A.R.E. of Niagara Falls Inc.	\$500
Hospice Niagara	\$108	Regional Niagara Upper Canada Lodge	\$5,151
International Child Care (Canada) Inc.	\$616	Ridley College	\$498
		Salvation Army	\$616

2009 GRANTS AWARDED

Salvation Army Community and Family Services - Niagara Falls	\$500
Salvation Army - St. Catharines Corps	\$414
Shaw Festival Theatre	\$9,000
Shaw Festival Theatre	\$1,000
St. Catharines General Hospital Foundation	\$430
St. Catharines General Hospital Foundation	\$456
St. Catharines General Hospital Foundation	\$560
Niagara Resource Service for Youth	\$4,000
Stamford United Church	\$1,000
Town of Lincoln	\$900
Town of Lincoln - Friends Charles Daley Park	\$900
United Way of Niagara Falls	\$1,000
United Way of South Niagara	\$924
United Way of St. Catharines & District	\$500
Victorian Order of Nurses	\$2,100
Welland Hospital Foundation	\$924
Wellspring Niagara Cancer	\$2,950
Wellspring Niagara Cancer	\$2,000
West Niagara Community Hospice	\$910
Willowbank School of Restoration Arts	\$500
Women's Place of South Niagara Inc.	\$106
Women's Place of South Niagara Inc.	\$1,000
YMCA of Niagara	\$768

NIAGARA FALLS FUND GRANTS

Canadian Tire Jumpstart (for Project Share)	\$1,920
Hannah House Maternity Home	\$1,296
YMCA of Niagara	\$1,920

NIAGARA WEST FUND GRANTS

Big Brothers Big Sisters Grimsby, Lincoln, West Lincoln	\$1,000
Canadian Tire Jumpstart (for Community Care of West Niagara)	\$1,375
Community Care of West Niagara	\$1,000

Community Living - Grimsby, Lincoln and West Lincoln	\$4,020
Foundation of Resources for Teens	\$1,500
Grimsby Benevolent Fund	\$2,000
Lincoln Community Against Violence	\$3,000
Lincoln Community Against Violence	\$1,500
Niagara Peninsula Children's Centre	\$3,000
Niagara Resource Service for Youth	\$4,000
Town of Grimsby - Recreation Services	\$925
Town of Lincoln - Rotary Bandshell	\$2,500
Town of Lincoln - Friends Charles Daley Park	\$2,000
Township of West Lincoln	\$4,925
United Way of St. Catharines & District	\$7,925
West Lincoln Community Care	\$3,000
YMCA of Niagara	\$1,375

PORT COLBORNE FUND GRANTS

Port CARES	\$1,708
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ST. CATHARINES FUND GRANTS

Community Care of St. Catharines and Thorold	\$6,670
Community Care of St. Catharines and Thorold	\$915
Education Foundation of Niagara	\$3,195
YMCA of Niagara	\$18,200

WELLAND FUND GRANTS

Canadian Tire Jumpstart (for The Hope Centre)	\$432
CAPC Niagara Brighter Futures	\$500
The Hope Centre	\$500
The Hope Centre	\$500
United Way of South Niagara	\$1,000
Welland & District Humane Society	\$2,500
Welland Public Library	\$500

CELEBRATING OUR GENEROUS DONORS

ESTATE TO BENEFIT ANIMAL WELFARE

Earl Clarke passed away in his mid-90's at a retirement home in St. Catharines. A recognizable figure who tirelessly walked the city and constantly travelled the area by public transit, Earl was a retired businessman who had no children and outlived most of his peers.

With no one to inherit the money he saved over his lifetime, Earl decided to leave his estate to two different organizations. Wanting part of his bequest to stay in the community he had come to call home, Earl donated part of his estate to the Niagara Community Foundation. In keeping with his personal wishes, he established an endowed, named field of interest fund to be used for the protection and preservation of animals and wildlife.

John Potts, now retired as a Financial Advisor at BMO Harris Private Banking, worked with Earle on his bequests, and says, "This Fund illustrates how any individual can give back to their community and direct that giving to their own personal area of concern, via a bequest to the Niagara Community Foundation." *

TWO GENERATIONS PARTICIPATE IN FAMILY FUND

"Our father is an incredibly hard working and generous man. He is humble and modest and we are very proud of his success." This sentiment, expressed by Kevin Hay's three daughters, is echoed by his wife, Kim, who explains how these traits led to the establishment of the Hay Family Fund.

Kevin wanted to ensure that the core values of hard work and philanthropy were passed along to his daughters. "When we heard about the Niagara Community Foundation, we thought this would be the perfect opportunity to teach our daughters about the joy of giving back," says Kim. "Giving our daughters this perspective has opened our eyes to the incredible number of people in need in our community."

In Kevin's own words, he wants his support to be used as directly as possible in his own community of Niagara Falls. "I didn't necessarily like the idea of sending money to a large corporate type charity. I want our contributions to have local impact, and to direct them to specific needs." Both Kevin and Kim hope that what they have started with their daughters will be continued for generations to come. *



A FIRM SUPPORTER

Our 2002 Annual Report featured the Sullivan Mahoney Endowment Fund, established to honour the law firm's 50th Anniversary. Eight years later, this Fund has reached its goal of raising \$25,000 and is making a real difference in the community.

Partner Victor Muratori, a past Foundation board member, explains that among the many reasons for the firm's support, "no single individual did more to influence our participation than the urgings of the late Frank Branscombe, who spent a good part of his very active life not only funding but also working for charitable causes."

The firm's partners and staff make weekly contributions with Friday Dress Down Days along with other donations that flow through the Fund. These dollars have already supported the operating funds of the Foundation and assisted organizations including Child Advocacy Centre of Niagara, Niagara Health System, and YMCA of Niagara.

"In a firm with multiple stakeholders and differing priorities, the ability to diversify and divide our giving is ideal," says Mr. Muratori. "If you would like to make a lasting contribution to good causes in Niagara, the Niagara Community Foundation provides the perfect vehicle for endowment giving, at all financial levels and for whatever causes you may wish to benefit." *



IT'S OUR
DUTY

MEL AND RICK GROOM

South Niagara is a great place to be. That's why the Grooms have chosen to live and work here and why they believe it's important to give back to their community. Rick was born and raised in Welland and Mel has lived in South Niagara long enough to think of herself as a local.

Charity is an important part of the makeup of Mel's family. Her role model was her father, who believed that giving back to the community where you live was a duty and a responsibility. "We in turn want to teach our children how important it is to give back what you can, when you can." Mel and Rick created the Groom Jensen Family Fund, a permanent endowment fund within the Welland Fund, as part of their enduring legacy and footprint they will leave to their community.

The Welland Fund helps good people do great things in our community. The Fund, which is Mel and Rick and their children's enduring legacy, supports local charities providing programs and services in Welland and is part of the family of funds held by the Niagara Community Foundation. Local charities play an important role in building a strong and vibrant community.

Mel and Rick encourage everyone to consider how they can leave their legacy to continue to make South Niagara a great place to be. *

VOLUNTEERS

Some of our most important volunteers are our board members, and we were pleased to welcome five new members in April 2009. Collectively they live and work across the region, representing the communities of Niagara-on-the-Lake, Grimsby, St. Catharines, and Wainfleet.

WILLIAM CHARRON Mr. Charron is the former Executive Director of Family and Children's Services Niagara. He is currently a director of Kids Help Phone board and an accreditation reviewer for Family Services Canada. Previously he was a director on the Ontario Association of Children's Aids Societies board, President of Moonstone Co-op and a founding member of David S. Horne Home. "The Niagara Community Foundation plays a very important role in Niagara," says Mr. Charron. "It ensures that great ideas become reality...benefiting all of us."

ALAN GODDARD After almost a year on the board, Mr. Goddard finds that "in many ways the Niagara Community Foundation represents the heart of our community. It is a true reflection of the generosity of the people of Niagara." Mr. Goddard is the former Vice President Corporate Affairs of Canadian Tire Corporation. He has also served as Chairman of the Canadian Tire Foundation for Families. His previous community experience included serving as chair of the Niagara College Board of Governors, Royal Conservatory of Music, Canadian Club of Hamilton and Hamilton Wesley House and as a member of the Board of Governors of McMaster University. He is currently a member of the West Lincoln Hospital Board of Governors.

RENA MCDONALD Ms. McDonald is the CEO of Vintage Hotels Management and Development Group and a director and officer of The Vintage Hotels group of companies. She holds a CMA accounting designation and served previously as a member of the Hotel Financial & Technology Professions board of directors. She is also a former member of the Ministry of Tourism Policy Advisory Council and the Financial Advisory Council of Holy Cross Church in Thorold. Rena's experience with the Foundation has been "inspiring." "The Foundation impacts so profoundly on the lesser known groups and organizations that may otherwise go unnoticed or have limited access to funds," she says.

KELLY ROBSON "What appealed to me most about the Niagara Community Foundation is it holds true to the old adage, 'charity begins at home', and provides a variety of ways in which one can give back to our community," says Ms. Robson. Ms. Robson is the Administrative Assistant for general surgeon Dr. Darrell Baker in Dunnville and has served as a canvasser and captain for the Ontario Heart & Stroke Foundation since 1998 and the parade coordinator for the Wainfleet Fall Fair Committee since 2005. She previously served for five years on the inaugural Niagara Trillium Grant Review Team and was the co-chair of the United Way of South Niagara's Wainfleet Campaign.

ROB WELCH Mr. Welch is a partner with the law firm of Lancaster Brooks & Welch. He is the Chancellor of the Anglican Diocese of Niagara and a board member of the United Way St. Catharines & District. A former board member and lifetime member of the YMCA of Niagara, Mr. Welch was the recipient of two Paul Harris Fellowships from the Rotary Club of St. Catharines South and is a member of the Order of Niagara, Anglican Diocese of Niagara. Mr. Welch finds it particularly gratifying to be involved as a board member of an organization "that is truly making a difference in the lives of many people and organizations throughout Niagara".

ENDOWMENT FUNDS CONTINUE TO GROW

The Foundation has a different face to each of our donors. We find that their gifts support a particular cause or fund or is given in honour or memory of an individual. Our role is to work with donors to ensure that their charitable intent is achieved through their gift. Thank you to those who chose to leave their legacy to the community through the Niagara Community Foundation.

There are many ways to make a gift to the foundation including cash, bequests, insurance policies, securities or property. However, with increasing demands for support, it is important to take the time to determine how to make “the best gift”, a gift that provides maximum benefit to the community that is within one’s capacity to give. In order to determine how to make “the best gift” consider these factors:

- Financial circumstances (i.e. financial resources and obligations)
- Personal circumstances
- Philanthropic objectives, such as:
 - Interest in a particular field of interest (i.e. arts, education, children and youth, seniors, the environment);
 - Provision of immediate or ongoing support;
 - Assurance of wise investment of your gift (regarding both investments and grants).

We strongly advise that you speak with your lawyer, accountant or estate planner to determine the best way to make a gift that maximizes your tax and estate goals. We also suggest that you speak to your family should you decide to leave a bequest. The foundation provides a variety of endowment fund options for donors to consider. Funds can be created during your lifetime or through your estate. Donations to create named funds can be gifted over a ten-year period and can be paid in monthly installments. As you imagine the possibilities for leaving your legacy, read through the options available to our donors. The foundation staff would be pleased to meet with you to help explore how best to fulfill your charitable intentions.

THE NIAGARA FUND

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

- Alice Downie-Bacon Com. Fund
- Marv & Andrea Kriluck Fund
- Branscombe Family Fund
- Casino Niagara Cares Fund
- Caughill Family Fund
- Crawford, Smith & Swallow Fund
- Elvi Vicary Fund
- George & Doris Shepherd Family Fund
- John & Jan Potts Fund
- Jack & Nora Walker Fund
- Niagara Credit Union Fund
- Niagara Fund
- Dr. T. W. & Muriel O'Mulvenny Fund
- Waters & Meredith Fund

DONOR DESIGNATED FUNDS

This type of fund gives donors the opportunity to specify, at the time the fund is established, which particular charities they would like to support in perpetuity. The minimum donation to open a designated fund is \$10,000 per beneficiary.

- Alice Downie-Bacon Designated Fund
- Anonymous Donor Fund
- Art & Val Fleming Fund
- Audrey Shimizu Memorial Fund
- Church of the Transfiguration Education Fund
- Colleen Kiers Memorial Fund
- Christopher Lackenbauer Memorial Fund
- Earl & Ida Clarke Animal Welfare Fund
- Hildebrand Lehn Family Fund
- Joan E. Marlow Memorial Fund
- Joan E. Marlow Salvation Army Endowment Fund
- John-Micheal Martin Memorial Fund
- Kiers Family Fund
- Lincoln County Fair Fund
- Morabito Family Fund
- Schizophrenia Research Fund
- Stephen Souter Memorial Fund
- Wills Family Foundation
- Wellspring HOPE Fund
- Gene Luczkiw Spirit of Enterprise Fund
- Marchand Kruczynski Family Fund
- Morgan Funeral Home Community Fund
- N & M Walker Foundation
- Niagara Engineering Week Scholarship Fund
- Niagara Road Supervisors Assoc. Fund
- Partridge Gilliam Family Fund
- Stewart Family Endowment Fund
- Sullivan Mahoney Endowment Fund
- Young Children Priority First - Kiwanis Fund

DONOR ADVISED FUNDS

This fund enables donors to have ongoing participation in the selection of charities that will benefit from their gift. The minimum donation to open a donor advised fund is \$25,000.

- Brunatti-Dyment Fund
- Cornelius & Helen Vanden Top Charity Fund
- Donald & Barbara Fraser Fund
- George Darte Funeral Chapel Fund
- Ida & Bob Gale Sr. Community Fund
- Mark Graham Memorial Fund
- Grape & Wine Industry Education Research Fund
- Jordan Engineering Shared Blessing Fund
- Anna Angelone Endowment Fund (supports projects for homeless youth)
- Arts & Heritage Community Development Fund for the Old Town of Niagara on the Lake and the Village of Queenston
 - Arthur Dalfen Fund
 - Valentina McLeod Fund
- Cultural Endowment Fund for Niagara
- Niagara Children's Chorus Fund (for youth choral project)
- Ontario Endowment For Children and Youth in Recreation

COMMUNITY IMPACT FUNDS

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

ENDOWMENT FUNDS CONTINUE TO GROW

- Sunday in the Parks (supports projects for the advancement of women and girls)
- Environmental Legacy Fund for Niagara
 - Enbridge Awaire Fund
 - Environment Endowment Fund
 - Fengate Realty Group Env. Fund
 - Harry Deline Fund
 - Nelson Aggregate Environmental Fund
 - Niagara CAER Group Fund
 - R. V. Anderson Assoc. Fund
 - Roll Surface Technologies Inc. Fund
 - RWDI Air Inc. Fund
 - Samuel L. Rudolph Memorial Fund
 - Urban & Environmental Mgmt. Fund
 - W. S. Tyler Environment Fund
 - Walker Industries Earth 1st Fund
 - Walter & Sons Excavating Environment Fund

CHARITABLE ORGANIZATION FUNDS

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

- Big Brothers Big Sisters Endowment Fund
- Community Care - St. Catharines Thorold Fund

- Community Living St. Catharines Endowment Fund
- Conservation Niagara Fund
- Fort Erie Conservation Club Fund
- Friends of Fort Erie's Creeks Fund
- Hospice Niagara Fund
- Joan Marlow YWCA Endowment Fund
- Land Care Niagara Fund
- Mayholme Foundation Fund
- Niagara Falls Big Brothers Big Sisters Scholarship Fund
- Niagara Falls Humane Society Shelter Enhancement Fund
- Niagara Land Trust Endowment Fund
- Niagara on the Lake Library – Michael Dietsch Fund
- Niagara Survivor Services Fund (CARSA)
- Upper Canada Lodge Auxiliary - Constable Family Fund
- Women's Place of South Niagara Endowment Fund

LOCAL COMMUNITY FUNDS OR AFFILIATES

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

NIAGARA FALLS FUND

- DiCienzo Family Fund
- Embassy Suites Hotel Fallsview Fund
- Hay Family Fund
- Hilton Niagara Falls Fallsview Fund
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- Environmental Legacy Fund for Niagara West
- Niagara West Fund
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- Ken & Jennifer Southward Fund
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- Marsh Family Fund
- Port Colborne Fund
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- Durward Jones Barkwell Fund
- Investing in St. Catharines Youth Fund
- St. Catharines Fund
- Whyte Family Endowment Fund

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- Groom Jensen Family Fund
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- Welland Fund

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HERITAGE SOCIETY

Members of the society have included the Foundation in their estate plan making a real difference in our community's future. We would like to thank the following people who have named the Niagara Community Foundation in their will, donated a life insurance policy or will be donating the proceeds from their RRSPs:

anonymous donor, Norm Bradshaw, Anne-Louise Branscombe, Elizabeth Connor-Elliott, John P. Cunningham, Brian Harrison and Daryl Novak, Sandra Durward, Brad Hutchings, Anne Kemp, Sharon Kirk, June Munro, Liz Palmieri, Luigi Setacci, Marc & Deb Slade, Chuck & Judy Smith, Jessie Thompson and Carl & Eileen Urben.

SUMMARIZED FINANCIAL INFORMATION

FOR YEARS ENDED DECEMBER 31, 2009 AND 2008

BALANCE SHEET

Assets	2009	2008
Cash	\$ 94,754	\$ 340,268
Accounts receivable	17,728	18,142
Prepaid expenses	9,888	4,512
Investments	9,925,701	8,712,815
Fixed assets	9,024	7,889
TOTAL ASSETS	\$10,057,095	\$ 9,083,626
Liabilities and Fund Balances		
Liabilities		
Accounts payable and accrued liabilities	\$ 14,360	\$ 14,989
Grants payable	170,545	280,977
Deferred revenue	101,473	64,206
Total Liabilities	286,378	360,172
Fund Balances		
Operating fund	108,240	124,770
Endowment fund	9,662,477	8,598,684
Total Fund Balances	9,770,717	8,723,454
 TOTAL LIABILITIES AND FUND BALANCES	 \$10,057,095	 \$ 9,083,626

The summarized financial information presented here was extracted from the audited financial statements of the Niagara Community Foundation. The firm of Partridge Iggulden LLP performed the audit and issued an auditors' report on the financial statements. Complete audited financial statements, with accompanying notes, are available from the Foundation on the foundation's website.

NOTES TO THE FINANCIAL STATEMENTS

The Niagara Community Foundation is a public foundation under the Income Tax Act (Canada) and, as such, is exempt from income taxes and able to issue donation receipts for income tax purposes. The Foundation serves the Niagara Peninsula by building permanently endowed charitable funds for the changing needs and opportunities of the community.

STATEMENT OF REVENUE, EXPENSES AND FUND BALANCES

Revenue	Operating Fund	Endowment Fund	2009	2008
Donations	\$ 34,636	\$ 372,350	\$ 406,986	\$ 829,715
Restricted donations	-	235,932	235,932	281,359
Investment income(loss)	853	1,074,852	1,075,705	(1,699,087)
Special events and sundry	158,546	95,341	253,887	322,451
Trillium grant	48,909	-	48,909	7,783
Other grants	723	-	723	3,548
TOTAL REVENUE	243,667	1,778,475	2,022,142	(254,231)
Expenses				
Advertising and promotion	19,904	-	19,904	6,518
Amortization	3,002	-	3,002	2,164
Grants	-	514,613	514,613	469,087
Investment counsel fees	-	68,188	68,188	74,195
Office and administration	66,019	12,307	78,325	65,174
Salaries and benefits	155,474	-	155,474	122,417
Special events and projects	101,820	33,552	135,372	189,983
TOTAL EXPENSES	346,219	628,660	974,879	929,538
Excess (Deficiency) of Revenue over Expenses before Fund transfer	(102,552)	1,149,815	1,047,263	(1,183,769)
Fund Transfer	86,022	(86,022)	-	-
Excess (Deficiency) of Revenue over Expenses for the Year	(16,530)	1,063,793	1,047,263	(1,183,769)
FUND BALANCE, BEGINNING OF YEAR	124,770	8,598,684	8,723,454	9,907,223
FUND BALANCE, END OF YEAR	\$ 108,240	\$ 9,662,477	\$ 9,770,717	\$ 8,723,454

SIGNIFICANT ACCOUNTING POLICIES

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

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

INVESTMENTS – Investments are classified as held for trading and reported at fair market value.

THANK YOU TO OUR SUPPORTERS

THE CONTRIBUTION OF TIME AND TALENTS OF OUR VOLUNTEERS,
DONORS AND STAFF IS THE **'INTANGIBLE WEALTH'** OF THE FOUNDATION.

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