

COMMUNIQUÉ

A publication of Niagara Community Foundation – August 2001

Message from Board President,
John Potts

Welcome to Communiqué - our inaugural edition of the Niagara Community Foundation newsletter. We have come a long way in a relatively short period of time- thanks in large measure to the many friends, supporters and volunteers who have come on board to help build the Foundation and strengthen our local communities.

Earlier this year, the Board of Directors made a considerable effort in developing a three-year Strategic Plan to help guide the Foundation. Many of our achievements to date are described in the newsletter.

Some highlights include:

- recruiting over 40 volunteers from across the Region
- creating 3 new endowment funds
- organizing a half-day conference for professional advisors
- announcing our first grants program
- establishing a local community fund
- launching our web-site
- acquiring tax resource material for our donors
- reaping the benefits from fundraising events organized by others
- developing an affiliate relationship with a local community

On behalf of the Board, I would like to extend my sincere thanks to all volunteers and donors from across Niagara for your support. We could not have journeyed this far without your help.

John Potts

Niagara Donors Show Early Support

The Niagara Community Foundation is a collection of funds given by caring citizens. We applaud the following donors from across Niagara for showing leadership in establishing their funds with the Foundation.

Anita Skinner, publisher of The Downtowner, was the winner of the Casino Niagara Cares Community Contribution Award for 2000. Ms. Skinner donated her prize of \$10,000 to create the Anita Skinner Fund. A portion of the income will be donated each year to one or more charities in Niagara that Ms. Skinner would like to support.

St. Catharines based developer Sam Morabito created the Morabito Family Fund and has targeted a local hospital foundation as the recipient of the annual distributable earnings from the fund.

This summer our first local community fund was established. In April of 1997 the Welland Community Foundation was created. In June, the Welland Community Fund was established with the assets from the Welland Community Foundation. The fund will support the work of charities serving Welland. This is an open fund and any donor wishing to support Welland charities can target their gift to this fund.

Under the leadership of St. Catharines Councillor Judy Casselman, a Steering Committee was formed in the late '90s to create a community foundation for St. Catharines. This spring we developed a unique agreement with the Steering Committee, to create the St. Catharines Community Fund. This Fund will be an affiliate of the Niagara Community Foundation.

We are working with donors from around Niagara on further gifts.

Golf Tournament Supports Foundation

The proceeds from the Regional Chair's 2001 Charity Golf Tournament, taking place on September 6 at the Royal Niagara Golf Club, will be donated to a new fund at the Foundation that supports projects for children and youth in recreation. The Province of Ontario will match \$10,000 of the proceeds.

A big THANK YOU to Regional Chair Debbie Zimmerman for her ongoing support to the Foundation. Last year the tournament raised over \$31,000 and she has her sights set even higher this year.

To register for the tournament call Linda Rix at (905) 685-4225 (ext. 3341)

COMMUNIQUÉ

Journeys in Charitable Giving

On October 17th, Four Points Sheraton in Thorold will be the location of a seminar offered by the Foundation to professional advisors from Niagara. During the morning, professionals in the investment, insurance, legal, accounting, charitable and financial planning sectors will learn about aspects of charitable giving.

The Journeys in Charitable Giving seminar is modeled after similar sessions offered by community foundations in Ontario. The registration fee is \$100 and information is available by calling the Foundation office at (905) 684-8688.

Inaugural Grants Program Announced

Thanks to the time, energy and talents of the volunteers on our Grant Making Advisory Committee for their work to develop our first grants program. At the June meeting, the Board approved the grant criteria and application form.

The priority of the program is to support projects that help organizations become stronger – specifically those skills, tools and resources needed to improve their ability to achieve success. By developing the strengths, assets and capabilities of charities, we believe that we can build a stronger Niagara.

This year the Foundation has \$10,000 available to grant. The deadline for applications is August 31st and copies of the grant criteria and application form are available from our office or can be downloaded from our website at www.niagaracommunityfoundation.org.

Niagara Credit Union: Lives Grow Here

In addition to its gift of \$100,000 to our Community Fund, the Niagara Credit Union continues to offer support to the Foundation.

John Potts, President of the Foundation, was invited this spring to report to over 400 NCU members at its Annual Meeting. An article about the Foundation was included in the spring issue of the NCU newsletter, Growing Conditions. And this May it selected the foundation to be the feature of a full page Spotlight on Niagara's Community Organizations in the Niagara Falls Review.

The credit union continues to accept donations on behalf of the Foundation at its branches throughout Niagara.

The new corporate slogan of Niagara Credit Union says Lives Grow Here. We want to offer our thanks to Niagara Credit Union for helping the Niagara Community Foundation also to "grow here".

We're Spreading the Word

Since last November, our volunteers and staff have made over 30 presentations around Niagara. Municipal councils, service clubs, town hall meetings, cable TV, and charities responded to our invitation to introduce the Foundation.

We've spoken directly to over 800 people from Wainfleet to Fort Erie, Grimsby to Niagara-on-the-Lake. And since most municipal council meetings are broadcast over cable, we reached a much larger audience.

If your group or board would like to hear more about us, call the Foundation at (905) 684-8688.

For further information on the Foundation please call Liz Palmieri, Executive Director at (905) 684-8688 or visit our website at www.niagaracommunityfoundation.org

Let us know what you think about COMMUNIQUÉ. Give us a call at (905) 684-8688 or send an email to ncf@becon.org.

COMMUNIQUÉ

Free Resources Available from the Foundation

The Foundation now has the following resource material available for our donors.

- Price Waterhouse Coopers' Charitable Giving Guide for Individual Donors
- RBC Investment's Charitable Giving publication
- Tax Advantages of Donating to Charity published by the Government of Canada

Donors can call the Foundation office at (905) 684-8688 to have any or all of these resources mailed to them.

Sunday in the Parks

The stunning Niagara Parks Botanical Gardens was the setting for a fundraiser to support the Foundation.

Co-chairs Karen Stearne and Ann-Louise Branscombe, with a team of generous and talented volunteers, managed together with a team of generous and talented volunteers to pull out all the stops, offering champagne cocktails, an open-air theatre kitchen, guided tours of the gardens and perfect weather to over 180 guests. The event was a resounding success, raising in excess of \$10,000 to create the permanently endowed Sunday in the Parks Fund at the Foundation.

Making Your Gift Work for the Community

We offer a number of ways to support our community's well being and have a variety of funds available for our donors to consider. A portion of the earnings on each fund is disbursed annually to support charities.

The Community Fund is comprised of donations, large and small, from a variety of sources - individuals, corporations and foundations. The earnings on this fund enable our Board of Directors to respond to current community needs through the provision of grants to charities throughout the Niagara Region.

A Designated Fund gives donors the opportunity to specify, at the time the fund is established, which particular charities to support in perpetuity.

Charitable Organization Endowment Funds can be 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.

Field of Interest Funds work much like our Community Fund, except that donors identify an area of interest that they would like to target their support.

A Donor-Advised Fund enables donors to have ongoing participation in the selection of charities that will benefit from their gift. Donors may choose this type of fund instead of creating a family trust or private foundation.

Emerging Funds enable donors to establish a fund in any of the above categories with an initial donation and a pledge to meet one of the minimum donation levels as described above within five years of the initial gift.

Our Founding Supporters

Thanks to the following for their generosity in supporting our first three years of operating support: Alderson, Caters & Hardy; Bank of Montreal; Beatties Basics; Bob Gale; The Branscombe Family Foundation; Casino Niagara; The Kenneth A. Fowler Foundation; Kenmore Developments Inc.; KPMG; Niagara Parks Commission; The Ontario Trillium Foundation; Peninsula Press Ltd; Regional Chair's 2000 Charity Golf Tournament; Region of Niagara; River Realty Development (1976) Inc.; Scotiabank; Sheraton Fallsview; The Standard; Sullivan Mahoney; and, Walker Industries Holdings Limited

COMMUNIQUÉ

Foundation Volunteers

We've been able to draw on the expertise of people right across Niagara who have provided us with valuable assistance during our first months of operation. The list is impressive and growing week by week. Take some time to read the names below and if you meet one of our volunteers during the next few months, please take a moment to say thanks.

Board of Directors

President: John Potts, Wealth Management Consultant, BMO Harris Private Banking

Vice-President: Ann-Louise Branscombe, Director, Branscombe Family Foundation

Secretary: Pat Darte, President, Patrick J. Darte Holdings
 Brian Babcock, Consultant, Babcock Business Strategies
 Paul Leon, Managing Partner, Larose, Leon, Taylor & Fazari
 Victor Muratori, Senior & Managing Partner, Sullivan Mahoney
 Eugene Oatley, retired VP, Niagara Plumbing Supply
 Stan Pettit, former Mayor of Wainfleet
 Norris Walker, Director, Walker Brothers Quarries Ltd

Treasurer: Andrea Kriluck, Region Editor, TheStandard
 Sean Jackson, President and CEO, Niagara Credit Union
 Shirley Martin, former Lincoln MP
 Robert Neill, Managing Partner, Durward Jones Barkwell & Co.
 John Palumbo, President, Palumbo & Associates
 Betty-Lou Souter, CEO Community Care, St. Catharines & Thorold

Honorary Chair: Frank Branscombe

<p>Investment Advisory Committee</p> <p>Chair: Sean Jackson Bill Finley, Nesbitt Burns Mel Groom, RBC Dominion Securities Steve Hudson, Niagara College Dave Morgan, Merrill Lynch Canada</p>	<p>Fund Development Committee</p> <p>Chair: Paul Leon Brian Babcock - Lincoln Shirley Martin - Grimsby Rosanne Marsh - Port Colborne Jay Merrin - Merrin Financial, Niagara on the Lake Victor Muratori - St. Catharines Rob Neill - Welland/Pelham Eugene Oatley - Niagara Falls John Palumbo - Fort Erie Stan Pettit - Wainfleet John Potts - St. Catharines</p> <p>Fund Development Volunteers</p> <p>Mel Groom - Welland/Pelham Rick Hatt - Welland/Pelham Mary Rashleigh - Grimsby Lib Zappitelli - TD Bank, Niagara Falls</p>	<p>Grant Making Advisory Committee</p> <p>Chair: Betty-Lou Souter Frank Adamson, Niagara Emergency Medical Services Stephen Butz, YMCA of St. Catharines/Niagara Falls/Welland Rebecca Cann, City of St. Catharines Bernadette Corbin, Welland Community Resource and Action Centre Manfred Fast, Ontario Trillium Foundation (Niagara Region) Terry McDougall, Niagara Peninsula Conservation Authority Foundation Ted Palmer, Business Education Council of Niagara Peter Papp, Region of Niagara</p>
<p>Professional Advisors Committee</p> <p>Chair: Liz Palmieri Greg de Prinse, Durward Jones Barkwell & Company LLP Marjorie Hull, The Financial Centre Securities Corp. Michael Philbrick, BMO Nesbitt Burns Andrew Patterson, Sullivan Mahoney Paul Sottile, Olsen Sottile Insurance Brokers Inc. Carol Stymiest, RBC Dominion Securities</p>	<p>Niagara Community Foundation.</p> <p>We're here for good...forever.</p> <p>We're here for good - to help you</p> <p>realize your charitable dreams,</p> <p>to promote philanthropy, and to</p> <p>build a better community -</p> <p>today, tomorrow and forever.</p>	<p>Marketing and Communications Advisory Committee</p> <p>Chair: Andrea Kriluck Chris Blake, Blake Communications Ann-Louise Branscombe Tim Foster, Tri-Media Marketing and Publicity Inc. Darrell Neufeld, Niagara College</p>