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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 (1975) Inc.; Scotiabank; Sheraton Fallsview; The Standard; Sullivan Mahoney; and, Walker Industries Holdings Limited.

Foundation Receives National Award

The Niagara Community Foundation received the 2002 Alastair Gamble Memorial Award at the national conference of Community Foundations of Canada, held this May in Kelowna, B.C. The award celebrates the growth and progress of community foundations and recognizes excellence and leadership. Niagara was the recipient in the category of community foundations with assets under \$3 million.

The award selection committee noted that the Niagara Community Foundation set a new standard and best practice in launching a new foundation and congratulated the work of the Steering Committee and inaugural board of directors for their success.

In accepting the award, Board Vice-President, Ann-Louise Branscombe, said "We would not be where we are today without the time and expertise of so many people. We are honoured and humbled to receive the recognition by our peers."

Successful Breakfast Hosted by Foundation

TSX President Barbara Stymiest was the guest speaker at a breakfast in May hosted by the Foundation. A capacity crowd of 250, many of whom were from Niagara's business community, were treated to an engaging and timely presentation on Communities and Capital Markets: Building a Better Canada. We were particularly moved by the following excerpt from her speech:

The substance of community is more than the infrastructure of roads, water and sewer mains...libraries and schools. It's more than the economic infrastructure of services, of vintners and fruit farmers. It's also the social infrastructure...the funding of arts and health, of social service and educational initiatives. These can tie a community together as powerfully as concrete and steel and maybe more so. Such things do something else. They can project a community and its values into the future and sustain it through difficult times.

Thanks to Foundation volunteer, Carol Stymiest, a.k.a. Barbara's sister, for arranging this presentation.



PRESIDENT'S MESSAGE

Vice-President, Ann-Louise Branscombe

In this issue of our newsletter Board President John Potts passes over the column to our Vice-President, Ann-Louise Branscombe, who attended the national conference of Community Foundations of Canada in May.

The conference keynote speaker was Emmett D. Carson, President and CEO of The Minneapolis Foundation who raised some challenging issues that provided food for thought as we build the resources of our own foundation.

Dr. Carson believes that the distinct competence and best purpose of community foundations has always been to develop unrestricted assets to address the most pressing problems of communities.

However, over the past 20 years community foundations have increasingly become more donor focused through donor advised and donor designated funds serving the charitable interests of individual donors and their families.

The challenge we face as the Niagara Community Foundation grows is to balance our resources - ensuring that while welcoming donor designated funds serving our individual donors charitable interests, we continue to grow our community fund which must address the changing, challenging and exciting new initiatives to strengthen and support our Niagara communities.

Ann-Louise Branscombe
Vice-President

NIAGARA COMMUNITY FOUNDATION

COMMUNIQUE

A publication of Niagara Community Foundation – September 2002

Camp Fund Raises \$10,000

The Niagara Newspaper Network is committed to investing in tomorrow through the youth of today. With its newly established Children's Summer Camp Fund, the Network helps send Niagara children in financial need to a variety of camping experiences. An opportunity to go to summer camp not only helps our children develop new skills, make new friends and raise their self esteem, it also gives them the chance to get their hands dirty and have lots of fun.

The Niagara Community Foundation, on behalf of the Network, administers the Summer Camp Fund. This year 24 groups received grants from the fund to send over 70 children to camps throughout Niagara. Grants were also available to cover the cost of a caregiver to attend camp with a special needs child.

The following newspapers are part of the Niagara Newspaper Network: St. Catharines Standard, Welland Tribune, Niagara Falls Review, Lincoln Post Express, Grimsby Independent, West Lincoln Review, Niagara Advance and the Fort Erie Times Review.

Regional Chair Named Honorary Patron

Regional Chair Debbie Zimmerman was named Honorary Patron of the Foundation at the Regional Council meeting held on June 6, 2002. The presentation took place during the Foundation's annual report to council. Board President John Potts acknowledged the support and encouragement that Chair Zimmerman has provided since the idea to create a community foundation was first presented to her in the winter of 2000 by Frank Branscombe. She continues to support the work of the foundation through the proceeds from her annual golf tournament held in September.

DID YOU KNOW?

Only 7% of all adults have included a charitable bequest in their will. However, an additional 27% of all adults would include a bequest in their will if they were asked. What these numbers tell us is that one in three adults or 34%, have already left a bequest or would leave a bequest to a charity if asked!

In Canada it is estimated that there will be an intergenerational transfer of wealth in excess of \$3 billion. Can you imagine the impact on our community and the charities providing services to our citizens if there was an increase in charitable bequests from 7% to 34%!

One of the simplest and most important things professional advisors can do to help their clients enjoy the benefits of planned giving is to ask them the giving question -- "Are there any charitable or community needs you would like to consider?"

The Niagara Community Foundation believes that professional advisors play an important role in providing opportunities for their clients to achieve their charitable wishes. Advisors may be charitable in their own right as a volunteer or contributor, but they also have a unique chance to "ask the charitable question" to their clients.

The Foundation in partnership with the Huronia Community Foundation has created a publication, "For Professional Advisors: Asking the giving Question", which provides tips, tools and conversation starters to raising "the giving question". Give us a call at (905) 684-8688 or send us an email at ncf@becon.org to receive a complimentary copy.

Niagara Survivor Services Fund

This fund was established to provide an ongoing source of funding for counselling, outreach, education and other services designed to empower victims and help them redefine themselves as survivors. Created as a charitable organization endowment fund by the Niagara Regional Sexual Assault Centre, the fund will help survivors of violent crime. Violent crime, including sexual assault and child abuse, claims victims from all walks of life. Without help, many will be left unable to work, care for their families or sustain social relationships. Timely, confidential access to free, professional counselling services, self-help resources and appropriate community supports makes it possible for victims from less advantaged backgrounds to overcome these traumatic events. Donors who are interested in supporting the work of this organization can donate to this endowment fund at the Foundation.

FUNDS OPENED IN 2002

Since our launch, 22 named funds were created at the Foundation. We met with each donor to determine the type of fund most appropriate to his or her philanthropic intent. Thanks to our donors for creating a fund with the Foundation as a permanent legacy. The funds raised to date total \$850,000.

Community Fund

A donation to this 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 the Niagara Region. Donors can establish a named fund within our Community Fund with a \$5,000 gift.

- Alice Helen Downie Bacon Fund
- Branscombe Families Fund
- Crawford, Smith and Swallow Fund
- Jan and John Potts Fund
- Niagara Credit Union 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. If unexpectedly, an organization ceases to exist, we can redirect the funds to a similar cause.

Attention Professional Advisors

During the morning of Oct. 23, the Foundation will be hosting its 2002 Professional Advisors Forum on Charitable Giving.

Professional advisors' clients are increasing their knowledge about financial planning options and expecting their advisor to help them create innovative, comprehensive financial plans that take care of their families and friends, avoid taxes and reflect their values. Confronted with the task of transferring assets from one generation to another, people are increasingly choosing to integrate charitable giving into their planning to realize personal as well as financial benefits. This conference provides valuable tips and tools relating to estate and gift planning.

A new focus this year will include sessions on what makes a philanthropist 'tick'. We'll hear from professionals on how to raise the subject of charitable giving with clients as well as information on charitable gift planning for small business owners and entrepreneurs. New this year will be a panel featuring a donor, their advisor and a charity discussing a case study of an actual gift.

The registration fee is \$60. CAIFA and CFP continuing education credits are available to members of these associations.

Go to the website at www.niagaracommunityfoundation.org or call the Foundation office at 905-684-8688 to obtain a registration form.

The minimum donation to open a designated fund is \$10,000 per beneficiary.

- Alice Helen Downie Bacon Education Fund
- Anita Skinner Fund
- Church of the Transfiguration Education Fund
- Joan E. Marlow Memorial Fund
- Luigi and Amalia Setacci Fund
- Morabito Family Fund

Donor Advised Funds

This 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. The minimum donation to open a donor-advised fund is \$25,000

- Donald and Barbara Fraser Family Fund
- Sunday in the Parks Fund
- Morgan Funeral Home Community Fund
- Niagara Road Supervisors Fund

Field of Interest Funds

These funds work much like our Community Fund, except that donors identify an area of interest that they would like to target their support. The minimum donation to open a donor-advised

fund is \$25,000

- Ontario Endowment for Children and Youth in Recreation to support charities across Niagara serving children and youth in recreation The \$65,000 donation to create this fund came from the 2001 Regional Chair's Charity Golf Tournament.

Charitable Endowment 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 their donors to contribute to their endowment fund.

A donation of \$10,000 opens this fund.

- Niagara-on-the-Lake Library – Michael Dietsch Family Fund
- Niagara Survivor Services Fund

Local Community Funds or Affiliates

These funds support the work of charities operating within a particular Niagara municipality and operate much like our Community Fund identified above. The minimum donation to open this type of fund is \$25,000.

- St. Catharines Community Fund
- Welland Community Fund

Professional Association Creates Fund

In 2001, the Niagara Road Supervisors Association (NRSA) hosted the annual Association of Ontario Road Supervisors' Trade Show.

Almost 235 exhibitors and over 2,500 municipal employees, contractors and suppliers from across Ontario registered for the show. In fact, the show was such a success that, after paying all the bills, they had a surplus of \$25,000. Joe Cousins from the Region of Niagara was aware of the role that the Foundation plays in the community and suggested to the Executive to open a Donor Advised Fund with the surplus. The fund was launched on March 29 at the Regional Council meeting. Each year members of the NRSA will select local charities to be the recipients of the annual distributable earnings on their fund.



John Potts, President of Niagara Community Foundation accepts cheque for \$25,000 from Charlie Finlay of the Niagara Road Supervisors Association.

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