



i am
THE FOUNDATION
of my community





THE FOUNDATION
of my community
starts with you and me

Report from the BOARD CHAIR and EXECUTIVE DIRECTOR

Why do an Annual Report? It certainly takes time, effort and creativity to pull together the information contained in this document. Not every organization produces one and they can have very valid reasons for making this choice. But for the Community Foundation of Mississauga, our decision to present this report each year is based on two important objectives. First, we continue to believe that these reports are an efficient way to demonstrate our commitment to transparency to our donors, our stakeholders and the broader Mississauga community that we serve. In addition to a small run of print copies, we make our annual report available on our web site to ensure the greatest access possible.

But our second reason goes right to the heart of who we are; as a charitable public foundation, a key goal is to provide donors with a cost effective option to build their permanent legacy of support for the causes and community that matters to them. Because we build endowed funds, our intent is to serve our community in perpetuity. So these annual reports become an integral part of our story. More and more years will pass, we will continue to grow and the annual story

of our Foundation... and the people who shaped it... will form our history. We will hold the names of our volunteers, our donors and fund holders and the growth that we achieve thanks to them, as the narrative of how people, working together, truly do make their community.

Governance

Through the early part of 2013, the Investment Committee continued their work evaluating options for investment management. Countless volunteer hours and generous expertise was provided by these skilled professionals. In April 2013, the Investment Committee was pleased to present their recommendation to the Board of Directors, that Connor, Clark & Lunn be selected as the investment manager of the pooled fund. The recommendation was based on factors such as performance, experience, leadership, reporting and a demonstrated understanding of the sector. Through the balance of 2013, the Foundation has been pleased to see the outcomes of their decisions as evidenced in the condensed financials.

The Board of Directors continued their work on the next Strategic Plan which is now available on the Foundation's web site.

In developing its strategic priorities, the Foundation is always guided first by its three core roles noted later in this report. But a new approach was taken this year, one that we hope makes it simpler for people to understand where we want to go and one that creates a "living" plan. Our 2014-2017 plan is an easy-to-read one pager. We invite you to review the plan by visiting the Accountability section of our web site and most importantly, if you have comments or suggestions, do send us an email.

Events

Special events have been a mainstay of the Foundation's annual activities for several years. Events help us build community awareness of the organization, meet potential new stakeholders and raise critical support for our capacity building work. Our Speakers Lunch and Golf Tournament are much enjoyed. We are also grateful to Advocis Peel Halton and Canyon Creek Square One for hosting events and designating the Foundation as the recipient charity. These organizations are helping us build community vitality!

But the blockbuster event this year was, without question, the inaugural

Dancing with Mississauga's Stars held in November 2013. The event provided all of the excitement of the smash television show, but featured Mississauga's own Stars. Mayor McCallion was on hand and charmed the guests with her delightful waltz. The event exceeded all of the Foundation's expectations and this was due to the remarkable dancers; Boris Jackman, Len Keywood, Reetu Gupta and Brenda Brown. We acknowledge the remarkable gift of time and energy they each gave to make the night so successful.

Knowledge

In October, the Foundation released Mississauga's Vital Signs 2013. This was the second Vital Signs report produced for Mississauga and it is becoming a sought after, easy to use resource for donors, residents, community organizations and volunteers. Mississauga's Vital Signs is part of the national initiative coordinated by Community Foundations of Canada and produced by community foundations locally all across Canada. But because it provides clear, concise and useable information, community foundations around the world are now starting to produce Vital Signs reports for their communities. This report is

available in hard copy from the Foundation office or in electronic form from our web site.

Our Foundation takes the important information in Vital Signs a step further; we convene community conversations on key data, drilling in to better understand the issues and how they affect our community. Since the launch of the first Vital Signs, we have brought together stakeholders and explored topics including the environment, housing, youth employment and more. We make these reports available to the community through our web site.

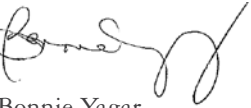
Philanthropic Impact


The Foundation provided approximately \$900,000 in grants to almost 70 different organizations during 2013. These grants supported programs and services delivered to everything from the environment, to local food banks, from scholarships for youth to community festivals, from neighbourhood projects to equipment for our local hospitals. We have come a long way in just over ten years. But we push forward; Mississauga is Canada's sixth largest city. Despite our youth, we know that we have work to do to meet the

needs of our dynamic city.

Integral to the progress we have made in our granting and our community knowledge work is the support of our Donors. Funds established in 2013 include the David and Shari Lane Family Fund, Nancy Salmon Scholarship Fund, Scott and Steve McNair Memorial Fund, Farnham Family Fund, Gabriel Fund, Fred and Eileen MacKenzie Fund and the Maries' Fund. As well, many donors added to existing funds. By the end of 2013 and thanks to support of our donors, the Foundation had achieved yet another milestone, passing \$20 million in assets under management.

This provides just a few of the highlights of our work in 2013. Not a day went by during the year when we were not reminded that our Foundation is indeed more than a charity, it is the empathy we feel for the people where we live.


Bonnie Yagar
Chair, Board of Directors


Eileen MacKenzie
Executive Director



more than charity
it's the empathy i feel for the
people where i live.

Turning TRAGEDY into TRIBUTE: Celebrating the lives and legacies of Scott and Steve McNair

"Most of us learned through our tight-knit group of friends of the tragic circumstances that brought an end to the life of our dear friend Scott McNair on Tuesday, February 21st, 2012. It was a difficult time for all of us and I am certain there were no words to describe our collective thoughts and feelings at that moment."

"Sadly, and in every way equally heartbreaking, we lost his brother Steve, only two months later. As a testimonial to the positive impact Scott and Steve had on each and every one of our lives, a few of us took the initiative and set up a memorial fund in their honour through the Community Foundation of Mississauga. The fund was to be an everlasting legacy to the kind-hearted souls that they were, a means of honouring their names in perpetuity and strengthening the memories we all keep of them."

"Most knew the McNair boys as truly avid hockey fans. The family had Leaf season tickets from the early 1960's and attending games as kids started their ongoing love for the Leafs that never faltered and defied all logic (regrettably, many of us suffer from the same curse)."

"Besides hockey, there was one other all-consuming aspect of their lives that they were known for and that was their love for their cottage up on Balsam Lake in the Kawarthas. They shared their love of the cottage life with so many and always generously hosted events so others could enjoy it as well. Many could argue that it was the social hub of the lake with the two boys at the centre."

"The impact they had on so many lives is undeniable and we are humbled by the outpouring of financial support from all of Scott and Steve's friends over the last two years. In the first year we were able to raise \$9,500 and by the end of 2013, over \$27,000 had been collaboratively contributed and we had exceeded the goal of \$25,000 we had set at the outset."

"The memorial fund was set up to ensure that Scott and Steve's legacy will live on and will be used to generate grants to support a wide range of programs that will enhance awareness, understanding and treatment of mental health challenges and promote access to care and research across the country."

— Ivar Grimba, family friend

From invisible to Visible

Often invisible, mental illness is one of the most pervasive health issues in our country with far reaching consequences for every Canadian. The stats are one in five people will experience a form of mental health challenge at some point and most will be reluctant to talk to a co-worker, friend or family member about their struggle, let alone seek treatment. This we all sadly experienced firsthand.

By honouring Scott and Steve through their selfless and generous contributions to the Scott and Steve McNair Memorial Fund, their friends have taken the positive step to address this challenge in the workplace and at home, helping to make all of our communities healthier and more productive.





Close to home is where the heart is,
where help goes farthest
my foundation helps me start this

NAMED FUNDS: Name the way your endowment will make a difference

Creating endowed funds is the heart of what our community foundation offers to donors. Hallmarks of our work, they are efficient, cost-effective and responsive to donors’ philanthropic interests.

People from all walks of life can create, or contribute to existing funds, which are held in perpetuity by the Community Foundation of Mississauga. In this way, people create a lasting legacy that will support the charitable causes they care about and their community for good, for ever.

The Foundation offers a wide range of funds that donors can choose from to best fit their interests. We also offer donors the ability to name their fund at certain fund minimums. Donors can establish a fund in their own name, their family’s name, the name of anyone they wish to honor, or any organization.

The following is a list of named funds held by the Community Foundation of Mississauga as of year-end 2013.

Mississauga Fund

The Mississauga Fund is an unrestricted fund accepting contributions of any size and providing donors with the knowledge that they are supporting the changing needs of our community.

- Crane Family Fund
- David and Shari Lane Family Fund
- Robert D. (Bob) Scott Fund
- Sanjib Choudhuri Fund
- Scott and Betty Franklin Fund

Donor Designated Funds

Donor Designated Funds are established to benefit specific charitable organizations as named by the donor to be the perpetual beneficiary of the granting from the fund.

- Brad and Kathy Shoemaker Fund for World Service and Development
- Carter Fund
- Chief Mbulu Family Fund
- CIBC Wood Gundy Fund for Children’s Charities
- Cristofaro Family Fund
- Gordon Fund
- Hazel McCallion Endowment Fund
- Ida E. Barnes Memorial Fund
- Kathy A. Drury Fund
- Liz Nilsen and Bernie Gross Fund
- Mendel and Ruth Cohen Fund
- Nancy Salmon Scholarship Fund
- Reamey Family Fund for the Women and Children of Interim Place
- Scott and Steve McNair Memorial Fund
- Winkworth Family Fund

Field of Interest Funds

Field of Interest Funds allow the donor to specify a specific area of interest such as children’s needs, the environment, health, and more, and the Granting Committee of the Foundation will select the most appropriate grant recipients each year.

- Environment Fund:
 - McGregor-Fielding Fund
- Smart and Caring Fund:
 - Farnham Family Fund
 - Gabriel Fund
 - Fred and Eileen MacKenzie Fund
- Maries’ Fund
- G. Ruth Gray Fund
- Paul Coughlin Fund
- R. Lessard Family Fund

Donor Advised Funds

Donor Advised Funds provide donors with the opportunity to be actively involved in the annual recommendations for granting from their fund. They can rely on the Foundation for the support and resources to assist them in their grant making.

- Cooney Family Fund
- Hazel McCallion Fund for Arts, Culture and Heritage
- Joe Schembri Scholarship Fund
- Meyer Family Fund
- Pendle Fund
- Wordham Family Fund

Operating Endowed Fund

People can make a gift of any size to the Operating Endowed Fund. In this way, donors help to ensure we continue to build a vital Foundation for our city. The Foundation is grateful to the following donors and fund holders who have established funds that ensure the continued effectiveness and growth of the Community Foundation of Mississauga.

- BMO Nesbitt Burns Patiopalooza Fund
- Brad and Kathy Shoemaker Fund
- Directors Fund
- Misscon Foundation and Rainbow Ball Fund



Charity Endowed Funds

Charitable organizations can work with the Foundation to establish their own endowed fund and can depend on us for the resources and expertise they need to build a sustainable source of support for their organization.

- Heart House Hospice
- Landscapes for Life
- Mississauga Festival Choir Endowment Fund

Funds Held for others

These funds are placed with the Foundation for investment by other charitable organizations.

- Benares Museum Fund
- United Way of Peel Forever Fund

Long-Term Flow-Through Funds

While not permanently endowed, these types of funds are established to be held for a more extended period of time.

- AstraZeneca Canada Adolescent Health Fund
- Community Door Fund*

Emerging Funds

Donors have the opportunity to establish a named fund within any of the fund options available with pledge commitment to meet the fund minimum within five years.

- Lewis Lawrence Fund

* Closed in 2013



people standing TALL
in neighbourhoods big and small,
old and new, one and all.

Generous donors make us STRONGER

The Community Foundation of Mississauga gratefully acknowledges the outstanding contributions of our donors and stakeholders. Their support is helping to build a better community by creating or contributing to endowed funds, supporting the Foundation’s events and programs and ensuring the sustainability of the Foundation’s operations. Along with our community, we extend appreciation to the individuals and organizations listed below who made lead gifts in 2013.

Aecon Group Inc.
Amoi
Baker Real Estate Incorporated
Bell Canada
Belrock Design Build Inc.
Blake, Cassels & Graydon LLP
Ron Brenneman
Mel Broten
Neil Camarta
Cambridge Drywall Services Ltd.
Canadian Imperial Bank
of Commerce (CIBC)
Glendy Chan
Sanjib Choudhuri
Caprice Chow
Colliers International
Compass Group Canada
Tom and Stella Cooney
Corby Distilleries
Covington Capital Corporation
Daco Aluminium
Dominic D’Alessandro
Daniels LR Corporation
Frank De Vries
Easton’s Group of Hotels
Ecolab
Excel Funds Management
Fielding Chemical
Technologies Inc.
Flanagan Food Services
Paul Gardner
Andrew and Catherine Gellatly
Gowling LaFleur Henderson LLP
Cam Graham
Groupe Desgagnes
Rajesh Gupta Foundation
Reetu Gupta
Shelley Gupta
Suraj Gupta

F. Robert Hewett
IBI Group
Jack Hamilton Agencies Ltd.
Boris Jackman
Keyser Mason Ball, LLP
Keywood Family
Saajid Khan
Peter Kircher
Richard Kuris
Labatt Breweries
David and Shari Lane
John Legault

Gordon LeRiche
R. Lessard Family
Mark Little
Patrick Lizotte
Jack MacDonald
Mickey MacDonald
Eileen and Fred MacKenzie
Jerald MacKenzie
Mike MacSween
Francis Mailhot
Andre Mak
Masco Canada

Howard McIntyre
Erin Meehan
Microsoft
MIDAC Solutions
Molson Coors
Elizabeth Nilsen
Dhanishta Patel
Playdium
Ranka Group
RBC Royal Bank
Joe Rinaldi
Ernest Roberts

Rovinelli Construction Inc.
S. Ford Ralph
(The Estate of) Nancy Salmon
Scotia McLeod
Ravi Sethi
Kris Smith
David Spaner
Michael Strong
Suncor Energy Foundation
Suncor Energy Services Inc.
Sysco Canada Inc.
Erica Teklits
Amy Tjen
TouchTunes
TWD Technologies
United Petroleum
Universal Space Video Game
Urban Construction
Equipment Ltd.
Joseph Vetrone
Wacky Wings Mississauga
Gordon Wells
Robert Wilkes
Joseph Wong
Michael Woolnough
Robert and Joanne Wordham
WorleyParsons
Caroline Yi



Corporate Partners

The Community Foundation
of Mississauga is pleased
to acknowledge our
2013 Corporate Partners

Supporters

BMO Financial Group
Suncor Energy Inc.

Friends

BDO LLP • Edward Jones • MNP LLP

Associates

Assante Wealth Management
Farnham + Co. Chartered Accountants
Pallett Valo LLP • Lumsden Bros. Ltd.

Affiliates

KPMG Enterprise
TD

Important information about how this data is compiled: The above list recognizes donors who have made a receipted gift or a grant directly to the Community Foundation of Mississauga in excess of \$500 in the 2013 fiscal year. If there are any errors or omissions, please accept our apologies and contact us at 905 897-8880 so that we may adjust our records and provide appropriate acknowledgement of your support. To those who made a pledge or a gift via the CanadaHelps website, please know that the Foundation sincerely appreciates your support but may not have access to information about your gift for recognition purposes.



2013 Grant Recipients

Thanks to the generosity of our donors, the Foundation provided approximately \$900,000 in grants to almost 70 different organizations during 2013. These grants supported the great work of the organizations listed here:

- Art Gallery of Mississauga • Best Start Health Coalition in Peel • Big Brothers Big Sisters of Peel • Boys and Girls Club of Peel • Cameron Helps • Canadian Wildlife Federation • Chamber Music Society of Mississauga Inc. • Community Foundation of Mississauga • Community Living Mississauga • COSTI Immigrant Services • Credit Valley Hospital Foundation • Dam (Heart Touching Heart Ministries) • East Mississauga Community Health Centre • Ecosource Mississauga • EcoSpark • Eden Community Food Bank • Epilepsy Halton Peel Hamilton • Erin Mills Youth Centre • ErinoakKids Foundation • Family Service Thames Valley • Halton/Peel Bereaved Families of Ontario • Heart House Hospice • Ian Anderson House Foundation • Interim Place • John Howard Society, Peel, Halton and Dufferin • Kids Help Phone • Learning Place • Living Arts Centre • Malton Neighbourhood Services • McMaster University • Mississauga Arts Council • Mississauga Convention Centre Foundation • Mississauga Festival Choir • Mississauga Food Bank • Mississauga Furniture Bank • Mississauga Heritage Foundation • Alzheimer Society • Arthritis Society • Heart and Stroke Foundation • Ontario March of Dimes • Options Mississauga • Orchestras Mississauga • Our Place Peel • Peel Children's Aid Foundation • Peel Children's Centre • Peel Senior Link • Presbyterian World Service & Development • Princess Margaret Hospital Foundation • Riverwood Conservancy • Safe City Mississauga • Salvation Army Canada • Salvation Army Oakville Community Church • Seva Food Bank • Sheridan Institute • Sickie Cell Awareness Group of Ontario Inc. • Silent Voice Canada • Small World Music Society • St. Mildred's-Lightbourn School • Supportive Housing in Peel • Trillium Health Centre Foundation • United Way of Peel • Victim Services of Peel • Vita Centre • Wellspring Cancer Support Foundation • Youth Without Shelter



THE FOUNDATION of my community

starts with you and me – more than charity

it's the empathy i feel for the
people where i live.

Close to home is where the heart is,
where help goes farthest
my foundation helps me start this.

people standing ^{TALL}
in neighbourhoods big and small,
old and new, one and all.

My care comes through
helping those that can't make do,
or get by, or maybe

just need to fly. 

My foundation has roots, here we stand,
intertwining, hand-to-hand,

showing what we thousands banded
together can do, including you, making true

the endeavour
to make things better

for generations still,
their dreams fulfilled,

it all gets built ...

ON THE FOUNDATION.





My foundation has roots, here we stand,
intertwining, hand to hand,
showing what we thousands banded
together can do, including you, making true

2013 Community Foundation of Mississauga Volunteers and Staff

It has been said that when people volunteer, they take action every day shaping the kind of community we want to live in. Volunteers with the Community Foundation of Mississauga share their time and talents to help the Foundation grow. They are in effect having a positive impact on every facet of life in our community. We believe that our volunteers are helping to shape a vital, strong future for everyone in Mississauga. We thank all of our volunteers who give so generously of themselves.

Board of Directors

Bonnie Yagar, President
Howard McIntyre, Vice President
Erica Teklits, Treasurer
Mary Main, Secretary
Paul Bernard, Director
Michael Gesualdi, Director
David Lane, Director
Daniel McCartney, Director
Gary Reamey, Director*
Bonni Titgemeyer, Director

Honourary Chair
Mayor Hazel McCallion

Staff

Susan Chan,
*Database and Accounting
Administrator*
Karen Dysart-Chuba,
Controllor
Afshaan Kohari,
Development Manager
Kate Lockwood,
*Community Leadership
Coordinator*
Eileen MacKenzie,
Executive Director

Standing Committees

Community leadership committee

Bonnie Yagar, Chair
Olivia Gismondi
Michelle Hooshley
Carlene McKenzie
Vanita Varma

Donor Development Committee

Michael Gesualdi, Chair
Tom Cooney
Husam Jandal
Howard McIntyre
Lori Simpson
Michael Taglieri*
Suzanna Winsborough
Bonnie Yagar
Merle Zoerb

Finance and Audit Committee

Erica Teklits, Chair
Scott Franklin
Mary Main
Cliff Preston*
Kevin Wong

Granting Committee

David Lane, Chair
Karen Campbell
Marcus Coutou*
Stephen Farnham
Maja Prentice
Erica Teklits

Investment Committee

Dan McCartney, Chair
Ginny Arnott-Wood
Jonathan Bertrand
Tim Haunn*
Ray Lessard
Erica Teklits
John Tinker

* Completed Term or Resigned in 2013

Ad Hoc Committees

Dancing with Mississauga Stars Committee

Lucia Al-Zaiatova*
Ann Boyd
Amy Delisle
Pat Hammill
Diane Kalenchuk
Karine Kaniki
Ellen McGregor
Steven Offer, Honorary Chair
Dian Seguin-McIntyre
Amy Tjen

Golf Committee

Jeff Cleary
Marcus Coutou
Jim Glassford
Irfan Khan*
Howard McIntyre
David Predovich*
Rob Sanders
Mallory Tardo*
Dennis Van Sickle

Speakers Lunch Committee

Sumblina Baig
Babindra Gambhir
Patricia Hammill
Cathi Krewicki
Shaunna LeBlanc
Dian Seguin-McIntyre
Amy Tjen

Smart and Caring Communities

Tom Cooney
Stephen Farnham
Ray Lessard
Steven Offer





the endeavour
to make things better
for generations still,
their dreams fulfilled,

A summer experience that lasts a lifetime

Peel Children's Centre's work mirrors the vision of the Community Foundation of Mississauga, with its emphasis in ensuring quality of life for everyone. Together, Peel Children's Centre and the Community Foundation of Mississauga provide hope and create lasting change and a brighter future for children and youth in our community.

In particular, the support of the Community Foundation of Mississauga's Pendle Fund allows high-risk children with significant mental health challenges to experience exciting summer fun, while preserving the coping skills they acquired in their treatment plan through the school year. Offered to children aged 6 to 12 and youth aged 13 to 18, the Day Treatment Summer Camp Program provides children an opportunity to take a break from their intensive treatment, offering them a chance to "just be a kid."

It is a specialized recreational program that blends summer activities with therapeutic and educational treatments – giving children and youth a chance to participate in activities that would otherwise not be possible.

The program provides an opportunity for marginalized children struggling with mental health issues in our community to participate in a program designed to give children the support they need to grow, develop and achieve a positive experience. A majority of the children and youth registered in the Day Treatment Summer Camp Program benefit from specialized classrooms throughout the year, and this continued support throughout the summer months when school is not in session is critical. These children and youth struggle with anxiety and

hyperactivity, and require intensive care and one-to-one support in order to successfully learn and deal with their daily lives. With continuous support through the summer months, these children and youth transition into the new school year more effectively.

The Community Foundation of Mississauga's support of Peel Children's Centre's work is but one indication of how, as a community, we are endeavouring to make things better.

Peel Children's Centre sends its thanks

"Peel Children's Centre is excited to be celebrating our five year partnership with the Community Foundation of Mississauga. As a dedicated donor to the Day Treatment Summer Camp Program, the Foundation has demonstrated exceptional commitment to making a real difference in the lives of children and youth in our community."

"Peel Children's Centre's mission is to 'enrich the lives of children and youth who experience social, emotional and/or behavioural challenges by providing a continuum of high quality mental health services.' It is with sincere gratitude that we acknowledge and celebrate The Pendle Fund's dedicated and continued contribution to our work, which helps us to fulfill our mission and enrich the lives of children throughout the summer months."

"From the staff, children, youth and families at Peel Children's Centre, thank you to The Pendle Fund and the Community Foundation of Mississauga."

– Andrea Peca, Development Coordinator
Peel Children's Centre

About Peel Children's Centre

Established in 1985, Peel Children's Centre is the largest most comprehensive, fully accredited, community based mental health agency serving children, youth and their families in Peel Region. Each day, PCC provides hope to children and youth who are seeking help for their emotional and behavioural struggles. With over 35 services being offered to children and youth in our community, last year alone, Peel Children's Centre provided over 6,600 individualized treatment services to close to 3,900 children and youth.



Children were asked how they felt about their first camp experience and their excitement was contagious...

"I loved swimming!"

"The visit to the Toronto Zoo was the best trip ever!"

Without camp, "I would have been laying on the couch playing video games and being bored."

"I liked everything!"

It is through the support of donors like The Pendle Fund that we are able to offer these memorable experiences to children, while ensuring they are in safe and supportive environment.





Did you know...



The Community Foundation of Mississauga achieved *over \$20 million in assets* as of year end 2013.



The Foundation has made *over 300 unique grants* to year end 2013.



Cumulative grantmaking to year end 2013 is *almost \$4.5 million*.



The *first grants* made from the Foundation came from a flow through fund established to support health-related programs and were made in 2003 to Catholic Family Services of Peel, Peel Chapter of the Tetra Society, Peel Chapter of the Canadian Hearing Society, India Rainbow Community Services, Heart House Hospice and Vita Centre.



The first endowed fund established at the Foundation was the *Paul Coughlin Fund* supporting programs and services for children.



The first staff person hired by the Foundation in 2002 was made possible by a grant from the *Ontario Trillium Foundation*.



To date, the *largest gift received* was *\$7 million in order to establish the Pendle Fund*.



it all gets built ...

THE FOUNDATION.

OUR VISION

A strong, vital community that has the resources it needs to ensure quality of life for everyone.

OUR MISSION

To create sustainable support for community needs in Mississauga by building partnerships with donors and stakeholders who establish endowed and other related funds, to maximize our community impact by ensuring that we identify and understand community needs, and to invest in solutions.



OUR VALUES

We build community vitality. Strong, vital communities are those in which everyone can participate. They are resourceful and resilient. Community foundations nurture and build our community's strengths and assets. We respond to challenges and opportunities and support organizations and individuals to do likewise. We develop local leadership, invest in sustainability, champion justice, and mobilize civic participation and resources.

We understand our communities

Sweeping changes to the economy, the environment and demographics are just some of the trends affecting our country and our communities. We actively participate in the life of the community, continually engage in consultation and discussion, track and report on local and national trends and respond to change.

We create opportunities for dialogue and inclusion

Nurturing a vital community means reaching out and ensuring that people with different experiences and points of view are included, especially those who are often excluded. We bring people together to create opportunities for respectful dialogue and joint problem solving. We enthusiastically participate when invited to dialogues convened by others.

We embrace partnerships

More can be accomplished when we act together. We believe in the power of collaboration and joint action to maximize our community's opportunities and respond to our challenges. We initiate, participate in, and support partnerships that build community vitality and are based on shared vision and mutual responsibility.

We tackle pressing issues

We believe philanthropy has a role to play in addressing some of the most pressing issues of our time. We tackle tough problems on many fronts through our grantmaking, investments, research, convening, communication and participation in the public policy process. We work with other foundations, organizations, business and governments in our region and across the country on problems that require shared action.

We embrace diversity and foster renewal

We believe there is strength in diversity. As our community's foundation, we have a responsibility to reflect its diversity. We continually renew our boards and staff, reach out to understand different points of view, and engage the broader community in our deliberations and decision making.

We grant for breadth and impact

Grant dollars are community capital for seizing opportunities, finding solutions, sustaining what works, providing needed services, expressing ourselves and taking calculated risks. We grant broadly across the spectrum of community life, supporting organizations and programs that are making a difference.

We build community assets and champion philanthropy

Permanent endowments and other philanthropic funds are vital community resources now and for the future. We are passionate champions of philanthropy and engage donors of all ages and from all walks of life and traditions. Our donors work with us to find the best ways to serve their communities while meeting their charitable goals.

We learn and share what we know

We have extraordinary opportunities to learn from the groups we fund, our donors, our partners and our colleagues around the country and the world. We gather data, question, reflect, and evaluate so that we can have impact on the important issues in our community. We share what we learn with others.

We are responsive and accountable

We are reputable stewards of community resources and are committed to being accountable, responsive and transparent. We continually look for the best ways to invest our assets to meet our mission. We are open and accessible, fair and objective, flexible and timely as we work with grant seekers, donors, volunteers and others in the community.

Statement of Financial Position

(000's)

ASSETS

| | 2013 | 2012 |
|---------------------|------------------|------------------|
| Bank | \$ 444 | \$ 519 |
| Accounts Receivable | 64 | 62 |
| Other Assets | 7 | 14 |
| Fixed Assets | 67 | 57 |
| Investments | 20,504 | 17,155 |
| | \$ 21,086 | \$ 17,807 |

LIABILITIES

| | 2013 | 2012 |
|-----------------------|------------|------------|
| Accounts Payable | \$ 16 | \$ 32 |
| Deferred Revenue | – | 18 |
| Funds Held for Others | 223 | 187 |
| | 239 | 237 |

NET ASSETS

| | | |
|-----------------------|------------------|------------------|
| Endowment Fund | 19,301 | 16,405 |
| Flow Through Fund | 952 | 813 |
| Capital Fund | 67 | 75 |
| Special Projects Fund | – | 15 |
| Reserve Fund | 250 | – |
| Operating Fund | 277 | 262 |
| | 20,847 | 17,570 |
| | \$ 21,086 | \$ 17,807 |

Statement of operations

For the year ended December 31, (000's)

| | Endowment Fund | Flow Through Fund | Special Projects Fund | Operating Fund | Capital Fund | Reserve Fund | 2013 Total | 2012 Total |
|----------------------------------|------------------|-------------------|-----------------------|----------------|--------------|---------------|------------------|------------------|
| Revenue | | | | | | | | |
| Donations | \$ 1,282 | \$ 170 | | \$ 78 | | | \$ 1,530 | \$ 182 |
| Grants and Other Income | | | \$ 34 | 0 | \$ 2 | | 36 | 118 |
| Investment Income | 2,768 | 147 | | 7 | | | 2,922 | 1,962 |
| Management Fees | | | | 246 | | | 246 | 220 |
| Special Events | | | | 332 | | | 332 | 72 |
| | 4,050 | 317 | 34 | 663 | 2 | – | 5,066 | 2,554 |
| Expenses | | | | | | | | |
| Administration | | | 54 | 232 | 14 | | 301 | 262 |
| Fund Development | | | | 25 | | | 25 | 24 |
| Grants | 893 | 139 | | | | | 1,032 | 631 |
| Management Fees | 204 | 39 | | 66 | | | 309 | 280 |
| Special Events | | | | 90 | | | 90 | 35 |
| Vital Signs Program | | | 32 | | | | 32 | – |
| | 1,097 | 178 | 86 | 413 | 14 | – | 1,789 | 1,232 |
| Excess of Revenue over Expenses | 2,953 | 139 | (52) | 250 | (13) | – | 3,277 | 1,322 |
| Transfer (to) from Other Funds | (57) | | 37 | (235) | 5 | 250 | – | – |
| Fund Balances, beginning of year | 16,405 | 813 | 15 | 262 | 75 | | 17,570 | 16,248 |
| Fund balance, end of year | \$ 19,301 | \$ 952 | \$ 0 | \$ 277 | \$ 67 | \$ 250 | \$ 20,847 | \$ 17,570 |

Community Foundation of Mississauga Condensed Notes to the Financial Statements December 31, 2013

1. Significant Accounting Policies

Investments: Investments are valued at fair market value. Investment income, includes interest and dividends received during the year, realized and unrealized gains net of capital losses. Investment income is allocated to the pool of Endowment Funds, Flow Through Funds, Operating Funds and Funds Held for Others.

Funds Held for Others: Funds held for Others represent community agency funds pooled with the Community Foundation of Mississauga for investment purposes. Investment income is allocated to the funds on a proportionate basis and the agencies are charged a cost recovery fee by the Foundation.

Flow Through Fund: Flow Through Funds are gifts to the Foundation that are generally not expected to be held in perpetuity. The capital and investment income from the Funds will be granted to qualified donees in accordance with the terms of the Fund agreement.

Endowment Fund: Donations to the Endowment Funds are considered to be permanent in nature, pursuant to restrictions established at the time that donations are received, and only the investment income from the investment of such Funds is disbursed to charitable organizations.

Special Projects Fund: These restricted funds include both the infrastructure fund and Vital Signs fund. The infrastructure fund was created from an externally restricted grant from the Ontario Trillium Foundation. The resources are to be used to enhance the capacity of the Foundation. The Vital Signs fund was created from a restricted grant from the Pendle Fund within the Foundation to enhance community knowledge available within Mississauga.

Reserve Fund: The reserve fund is an internally restricted fund to provide for major capital additions and other special purposes as approved by the Board of Directors.

2. Investment Management

Investments are professionally managed in accordance with the investment policy of the Foundation by Connor, Clark & Lunn Private Capital Ltd., B2B Bank Securities, and BMO Nesbitt Burns.

| | 2013 | % | 2012 | % |
|--|------------------------|--------------|------------------------|--------------|
| Community Foundation of Mississauga Pooled Funds (000's) | | | | |
| Cash and Cash Equivalents | \$ 285 | 2.6 | \$ 728 | 9.0 |
| Fixed Income | 2,438 | 22.5 | 1,051 | 13.0 |
| Canadian Equities | 3,421 | 31.6 | 2,021 | 25.0 |
| Global Equities | 4,700 | 43.3 | 4,285 | 53.0 |
| | 10,844 | 100.0 | 8,085 | 100.0 |
| Investments managed by | | | | |
| Professional Investment Advisors | <u>9,660</u> | | <u>9,070</u> | |
| Fair market value | <u>\$20,504</u> | | <u>\$17,155</u> | |

The complete Financial Statements for the year ended December 31, 2013 have been audited by Withey Addison LLP, Chartered Accountants and are available on request from the Foundation.



ABOUT US

Understanding our Community Foundation

The Community Foundation of Mississauga is an incorporated non profit, registered charitable public foundation. We are governed by a volunteer Board of Directors and accountable to our community. We serve all of Mississauga celebrating its many unique neighbourhoods and diverse voices.

The Foundation is a member of Community Foundations of Canada and part of a national network of over 190 community foundations. As a member of Community Foundations of Canada, we adhere to a rigorous set of standards and build community vitality by sharing three core roles with our peers across the country:

- Vitality depends on long-term resources for long-term solutions—so we *work with donors to build endowment funds* that ensure vital futures for communities.
- Vitality comes from all corners of a community, so we *grant funds to the widest possible range* of organizations and initiatives.
- Vitality needs leadership, so we *bring people together from all parts of our communities* to stimulate new ideas, build participation and strengthen community philanthropy.

Our approach

And while there are many organizations working for better communities, a few important factors make our approach special:

We bring donors to the table as community builders, and help them formulate and realize their philanthropic goals, matching their interests and concerns with community needs and organizations, and finding innovative and responsible ways to give their investments lasting impact.

We take the broadest view of what a community is and what it needs to succeed. This is why our grants support everything from shelter, sustenance and care for those most in need, to recreation, the arts, and the environment.

We take the long-term view for our communities: we identify long-term needs and opportunities and invest in sustainable solutions, helping our communities become resilient, resourceful, and ready for the future they want.



A proud member in good standing of Community Foundations of Canada

Our commitment to privacy

Our organization is committed to protecting the privacy of the personal information of its employees, members, donors and other stakeholders. We value the trust of those we deal with and of the public and we recognize that maintaining this trust requires that we be transparent and accountable in how we treat the information that you choose to share with us. During the course of our various projects and activities, we may gather and use personal information.

Anyone from whom we collect such information should expect that it will be carefully protected and that any use of or other dealing with this information is subject to consent. Our privacy practices are designed to achieve this. To read our privacy policy, visit our web site at www.CFofM.org

Contact Us

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Social Media

Stay in touch with the Foundation and learn more about what we are working on as it happens. Find links to our social media by visiting our website and clicking on the relevant button for Facebook or Twitter.

