

WindsorEssex Community Foundation

“Inspiring philanthropy
to benefit our community
today and forever.”

ANNUAL REPORT

2018-2019



www.wecf.ca

OUR HISTORY

The WindsorEssex Community Foundation (WECF) is a charitable organization dedicated to improving communities across Windsor-Essex County through collaboration, strategic leadership, and innovative solutions to charitable giving and has been serving Windsor-Essex County since 1983. Originally dedicated to reclaiming Windsor's riverfront through projects like the Peace Fountain, our support extended to countless landmarks across Windsor-Essex including the Ojibway Prairie Complex, the Ganatchio Trail extension, and more recently, the Great Canadian Flag Project. We are proud to continue funding charitable organizations throughout the community, increasing capacity through community partnerships.

Over the past 36 years, the WECF has accumulated over **\$18.6 million** in assets and has granted nearly **\$8 million** to a wide array of charitable programs. Having expanded our reach and legacy giving through the form of community initiatives such as Random Act of Kindness Day™, the Vital Signs® Program, Inspiration 100™, and the Leave a Legacy Program, we provide donors with unique ways to support and build Windsor-Essex County.

WHAT MAKES DONATING TO THE WECF UNIQUE?

Customized giving:

you have a choice of how and where to direct your gift

In-depth community knowledge:

we can help you make strategic giving decisions

Strong governance:

through our Board of Directors, committees, and professional staff, ensuring your interests are protected even after you're gone

Fiscally responsible, low-cost:

a deliberate and prudent philanthropic approach

MESSAGE FROM THE BOARD CHAIR AND EXECUTIVE DIRECTOR

It was another notable year for the WECF and we are proud to continue to work with you to build a strong and vibrant community!

Our impact continues to grow as we invest in our local organizations and the work that they do. This year the WECF was able to disburse over \$900,000 to worthy causes within our community. We are proud of the scope of our various programs including our donor advised and designated funds, scholarships, agency partnerships, and granting initiatives, and we will continue to work with our local non-profits and philanthropists to build long lasting partnerships and legacy funds.

We appreciate all of the outstanding support we received from our Board of Directors, volunteers and the community to make this year, once again, a success! As we move forward, we would like to thank all of our sponsors, fund holders, and donors who supported our specific programs, initiatives and funds. We hope that you continue to join us in supporting our community and helping make Windsor-Essex a great place in which to live, work, play and grow!



LISA KOLODY
EXECUTIVE DIRECTOR



JELLE DONGA
CHAIR

Our Mission

To build a better Windsor-Essex Community by attracting and managing legacy funds, making grants to support community programs, and bringing partners together.



OUR TEAM BOARD, STAFF & COMMITTEES



COMMITTEES

Executive Committee

Jelle Donga, Chair
Tom Touralias, Vice-Chair
Jonathan Allison, Treasurer
Rachelle Booth, Secretary
Lisa Kolody, Executive Director

Finance Committee

Jonathan Allison, Chair
Tom Touralias
Jelle Donga
Dan Hallett
John Renaud
Allison Hawkins
Joe Giorgi
Lisa Kolody

Grants Review Committee

Richard Wyma, Chair
Tom Touralias
Nora Bertram-Romero
Ryan Solcz
Anna Maruska
Lisa Kolody

Governance Committee

Jelle Donga
Tom Touralias
David Mueller
Joseph Giorgi
Lisa Kolody

Fund Development Committee

Kay Douglas
Loris Macor
Wen Teoh
Lisa Kolody

Random Act of Kindness Day™ Committee

Beth Ann Prince, Chair
Michelle Marcuz
Adam Patterson
Katharen Bortolin
Ajsela Murselovic
Lisa Kolody

Committee of Nominators

Mayor, City of Windsor
President, University of Windsor
President, Essex Law Association
Representative, Windsor &
District Labour Council
Resident of Windsor-Essex County
Representative, Windsor-Essex Regional
Chamber of Commerce

BOARD OF DIRECTORS



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CHAIR
Deloitte



TOM TOURALIAS
VICE-CHAIR
Amico Affiliates



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TREASURER
RBC



RACHELLE BOOTH
SECRETARY
Thrive Benefits



RICHARD WYMA
DIRECTOR
ERCA



LORIS MACOR
DIRECTOR
Solcz Group / PWC



WEN TEOH
DIRECTOR
EPICentre University of Windsor



KAY DOUGLAS
DIRECTOR
Douglas Marketing Group



MOHIT NAYER
DIRECTOR
Green Processing Co. Inc.



DAVID MUELLER
DIRECTOR
Heirloom Investment
Management



JOSEPH GIORGI
LEGAL COUNCIL
Fazio Giorgi LLP

OUR STAFF



LISA KOLODY
EXECUTIVE DIRECTOR



ANNA MARUSKA
PROGRAM COORDINATOR



AJSELA MURSELOVIC
ADMINISTRATION
COORDINATOR

OUR LEADERSHIP

The WindsorEssex Community Foundation is helping to build a better Windsor-Essex through its many programs and activities including:

Inspiration 100™

The inspiration of Marty D. Solcz, this program was launched in 2015 with the goal of assembling 100 community-minded people to create a legacy fund. Members meet annually to disburse grants to local charities. In November 2018, Inspiration 100™ was recognized with the Caesars Windsor Cares Award for Spirit of Philanthropy at the National Philanthropy Day Awards. In May, Inspiration 100™ celebrated a monumental milestone announcing that the fund reached \$1 million! We thank all members for their investment.



Inspiration 100™ donated \$30,000 to 6 local charities.

Random Act of Kindness Day™

Random Act of Kindness Day™ (RAK Day™) is a nation-wide celebration of kindness promoting a 'pay it forward' movement in the community that takes place annually on the first Friday in November. It is meant to be a fun and simple way to encourage unexpected moments of kindness in our community. For the past eight years, the WECF, in partnership with the Random Act of Kindness Day Foundation, has championed RAK Day™ in Windsor-Essex, engaging residents in small acts of kindness and generosity. We are proud to say that each year, more and more individuals, groups and organizations are participating to help make kindness the norm.

Vital Signs®

Vital Signs® is a national program coordinated by Community Foundations of Canada that leverages local knowledge to measure the vitality of our communities and supports action towards improving our quality of life. The report, released every October, combines national and local data with residents' views on key issue areas important to the quality of life in Windsor-Essex. Started by the Toronto Community Foundation in 2001, today over 100 communities across Canada and around the world use Vital Signs® to mobilize the power of community knowledge for local impact.



**COMMUNITY
FOUNDATIONS
OF CANADA**

Thank you to our 2018 Vital Sponsors for their generous support!



OUR IMPACT

GREEN SHIELD CANADA SIX 4 SIX COMMUNITY GRANTING INITIATIVE

To mark its 60th anniversary and to celebrate its 60-year history of social responsibility and charitable giving, Green Shield Canada (GSC) donated a total of \$6 million dollars across six Canadian communities to support innovative solutions for mental health and oral health. Those communities include Hamilton, Windsor-Essex, Calgary, Victoria/Vancouver, Northern Ontario and the Atlantic region. The WECF is proud and honoured to have been the chosen partner for local investment and the steward of the GSC Six 4 Six Community Granting Initiative.



In June 2019, \$580,587 was granted to eight local charities to fund programs that address the oral health and mental health needs of the Windsor-Essex Community. Of this total, \$50,000 was donated by the Honey Family Foundation leveraging the impact that these grants will have in our community.

SCHOLARSHIP FUNDS HELD AT THE WECF

The WECF holds scholarship funds that help students pursue a post-secondary education.

Constable John Atkinson Memorial Scholarship Fund

Father Matt Sheedy Scholarship Fund

Gale & Irene (Knister) Taylor Scholarship Fund

Harding Electric/ Morris & Ruth Harding Memorial Scholarship Fund

Hitchcock Family Foundation Endowment Fund

Hocktoberfest Legacy Scholarship Fund

Martha Reavley Community & Leadership Award at the Odette School of Business (Elaine & Harvey Snaden Endowment Fund)

Michael G. Solcz Endowment Fund

Rotary Club of Windsor (1918) Centennial Scholarship Fund

This year, 10 local youth benefited from the generosity of the donors to these funds, with a total of \$16,500 being granted to further their education. (For a list of grants, see page 7).

CANCER RESEARCH COLLABORATION FUND

In 2018, Jeff Casey, Diletta Bello-Casey and Harvey & Elaine Snaden established the Cancer Research Collaboration Fund at the WECF to support local cancer research initiatives. To create awareness, strengthen cancer research in the Windsor-Essex Region, and raise money to help support the fund they created the Play for a Cure Pro-Am Hockey Tournament. This fundraiser is a unique opportunity for hockey fans to play alongside and against some of the NHL stars that they grew up watching on TV. Through the support from the community, the event raised close to \$285,000 in its inaugural year! www.playforacure.ca



2018 - 2019 GRANTS

The WindsorEssex Community Foundation granted \$938,731 this year!

By providing funding to community projects and programs, the WindsorEssex Community Foundation inspires leadership, community collaboration, and innovation. Based on priorities identified in our annual Vital Signs® Report, the WECF funds programs that fall within our granting areas of interest and respond to community priorities.

Community Impact Grants provide up to \$15,000 in funding for projects or programs that forge partnerships, tackle important issues, and have a lasting impact on the Windsor-Essex Community. These grants fall into seven categories: Health & Human Services; Arts, Culture & Heritage; Recreation & Sport; Environment; Education & Literacy; Children & Youth; and Community Development. This year we were proud to disburse grants totaling \$36,000 to the following local charities and communities:

Amherstburg Food & Fellowship Mission Southwestern Ontario Gleaners
Brentwood Charity House Royal Canadian Legion Metropolitan Branch 594 (Town of Tecumseh)
Canadian Mental Health Association Windsor Symphony Society

Fast Track Grants provide up to \$1,000 in funding and are open for applications on an on-going basis throughout the year. The following organizations received a Fast Track grant this year:

United Way/Centraide Windsor-Essex
Corporation of the City of Windsor

KidStart Grants are offered in partnership with the GECDSB and the WECDSB. They provide up to \$500 in funding to individual elementary level classrooms in order for students to undertake a special project in the community. This year the WECF granted to the following elementary school classrooms:

Greater Essex County District School Board

A.V. Graham Public School
Central Public School
Coronation Public School
D.M. Eagle Public School
Ford City Public School
Forest Glade Public School
Lakeshore Discovery Public School
William G. Davis Public School



Ask us for more information about how you can support the collective impact of our granting!



The **Community Foundation** can help you make the most of your charitable giving by:

- Giving you the benefits of a private foundation without the administration.
- Connecting you with programs that interest you.
- Building your legacy by providing maximum tax savings and investment management.

WindsorEssex
Community
Foundation


www.wecf.ca

2018 - 2019 GRANTS

AGENCY GRANTS

Kiwanis Music Festival Fund

Kiwanis Music Festival Windsor-Essex County

Sunshine Point Camp Fund

Sunshine Point Camp (Kiwanis Charitable Trust)

Toldo Foundation Arts Fund

Windsor Symphony Society

Toldo Foundation Arts Matching Fund

Windsor Symphony Society

Windsor Symphony Society Matching Fund

Windsor Symphony Society

SCHOLARSHIP GRANTS

Constable John Atkinson Memorial Scholarship Fund

Wilfrid Laurier University

Elaine & Harvey Snaden Endowment Fund

University of Windsor

Father Matt Sheedy Scholarship Fund

University of Windsor

Gale & Irene (Knister) Taylor Scholarship Fund

St. Clair College

University of Windsor

Hitchcock Family Foundation Fund

University of Guelph

University of Windsor

Rotary Club of Windsor (1918) Centennial Scholarship Fund

University of British Columbia

FLOW THROUGH GRANTS

Canterbury Elder College

Drouillard Place (East Windsor Community Service Centre)

Erie Shores Hospice (Erie Shores Health Foundation)

Hiatus House

South Essex Community Council

Sunshine Point Camp (Kiwanis Charitable Trust)

Windsor Symphony Society

Green Shield Canada Six 4 Six Community Granting Initiative

Canadian Mental Health Association

Family Services Windsor-Essex

Life After Fifty

Multicultural Council of Windsor & Essex County

South Essex Community Council

United Church Downtown Mission Windsor Inc.

Windsor Family Health Team

Windsor Residence for Young Men

DONOR ADVISED GRANTS

Chad Ranni Memorial Fund

Lakeshore St. Andrew's Presbyterian Church

Rotary Club of LaSalle Centennial

Windsor-Essex Children's Aid Society

Class Action Community Fund

Ontario Student Nutrition Program

Facca Endowment Fund

Radius Child and Youth Services

Salt & Light Catholic Media Foundation

Windsor Essex County Cancer Foundation

Freed-Orman Families Fund

United Way/Centraide Windsor Essex

University of Windsor

Hitchcock Family Foundation Fund

Amherstburg Food and Fellowship Mission

Cambridge & District Humane Society

Canadian Liver Foundation

North Island Wildlife Recovery Association

Princess Margaret Cancer Foundation

Honey Family Foundation Fund

Green Shield Canada Six 4 Six Granting Initiative

Inspiration 100™

Horticultural Society of Leamington (Municipality of Leamington)

Inspiration 100™ Endowment Fund

Big Brothers Big Sisters of Windsor Essex

GR8 Day - Crossroads Addiction Recovery

Maryvale Children's Mental Health Centre

Riverside Minor Baseball Club - Miracle Park

Windsor-Essex Children's Aid Foundation

Windsor Essex Care for Kids Foundation

J & J Vollmer Fund

Alzheimer Society of Windsor-Essex County

Rotary Club of Windsor Foundation Fund

DONOR DESIGNATED GRANTS

Dorothy & Sydney Lawton Fund

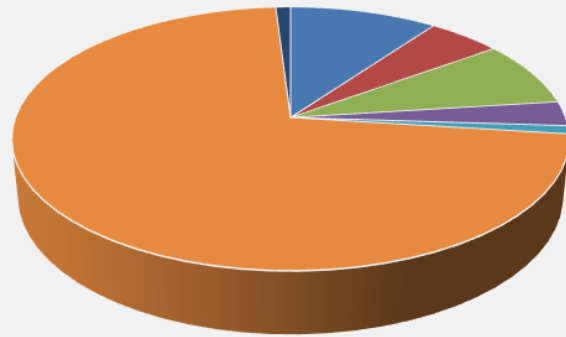
Italian Canadian Handicapable Association

Great Canadian Flag Project Fund

Corporation of the City of Windsor

GRANTS AWARDED BY SECTOR 2018 - 2019

Arts, Culture & Heritage
Children & Youth
Community Development
Education & Literacy
Environment
Health & Human Services
Recreation & Sport



Health & Human Services grants are high due to the flow through investment of \$580,587 into our community from the GSC Six 4 Six Granting Initiative.

TYPES OF FUNDS

Agency Endowment Funds allow charities an efficient way to create their own endowment fund while benefiting from the Foundation's investment and administrative expertise.

Donor Advised Funds allow fund holders to work closely with the Foundation's Grant Review Committee to select projects and organizations that mean the most to them. They operate much like private foundations but without the cost and administrative work for the donor.

Donor Designated Funds allow donors to make lasting gifts to their favourite charities. With the establishment of a fund, donors select one or more charitable organizations to benefit from their donation.

Scholarship Funds allow donors to make lasting gifts recognizing student potential. Funding is provided directly to the College or University that the student is attending.

Field of Interest Funds allows donors to identify with a specific area of interest that they wish to support. Local grant recipients are determined by the Foundation's Grants Review Committee, ensuring that the fund remains responsive to the community's needs while supporting the donor's interest.

Managed Funds are established by agencies in order to benefit from the professional investment management and administrative expertise that the Foundation has to offer.

WECF Community Fund is composed of many gifts, large and small, each symbolizing a lasting investment in our region. Grants from this fund are awarded through our Community Impact, Fast Track, and KidStart grant programs, allowing us to respond flexibly to the needs and priorities of our community.

LIST OF FUNDS

A Place For Life Endowment Fund

AKO Fraternity Managed Fund

BERL Endowment Fund

Big Brothers Big Sisters Endowment Fund

Big Brothers Big Sisters Managed Fund

C.M. (BUS) Lossing AKO Endowment Fund

Canadian Mental Health Association Endowment Fund

Cancer Research Collaboration Fund

Chad Ranni Memorial Fund

Class Action Community Fund

Constable John Atkinson Memorial Scholarship Fund

Dorothy & Sydney Lawton Fund

Elaine & Harvey Snaden Endowment Fund

Essex County Nature Managed Fund

Essex Nature Fund

Essex Region Conservation Foundation Managed Fund

Facca Endowment Fund

Father Matt Sheedy Scholarship Fund

Freed-Orman Families Fund

Friends of Athletics Fund

Friends of Ojibway Prairie Managed Fund

Gale & Irene (Knister) Taylor Scholarship Fund

Girard Riberdy Fund

Great Canadian Flag Project Fund

GSC Community Impact Fund

HC Endowment Fund

Harding Electric / Morris & Ruth Harding Memorial Scholarship Fund

Hitchcock Family Foundation Fund

Hocktoberfest Legacy Scholarship Fund

Honey Family Foundation Fund

Inspiration 100™ Endowment Fund

J & J Vollmer Fund

James L. Scorgie Leadership Fund

Joan & Clifford Hatch Fund

Joe & Hazel Lacey Memorial Fund

Kiwanis Music Festival Fund

Michael G. Solcz Endowment Fund

People First of Ontario Fund

Riverfront Development Fund

Rotary Club of Windsor (1918) Centennial Scholarship Fund

Sandra Beatty Endowment Fund

Solcz Group Inc. Community Fund for Children

Sunshine Point Camp Fund

The Jack Miner Migratory Bird Foundation Managed Fund

Toldo Foundation Arts Fund

Toldo Foundation Arts Matching Fund

Vitality Fund

WFCU Managed Fund

Windsor Classic Chorale Managed Fund

WindsorEssex Community Foundation Operating Fund

Windsor Public Library Foundation Fund

Windsor Symphony Society Managed Fund

Windsor Symphony Society Matching Fund

WindsorEssex Community Fund

Youth Endowment Fund

Youth Sports Support Fund

NEW FUNDS



**CANCER
RESEARCH
COLLABORATION
FUND**

Cancer Research Collaboration Fund
Established December 2018



**Big Brothers
Big Sisters
OF CANADA**

Big Brothers Big Sisters Endowment Fund
Established February 2019

Big Brothers Big Sisters Managed Fund
Established February 2019



GSC Community Impact Fund
Established January 2019

HC Endowment Fund
Established January 2019

STATEMENT OF FINANCIAL POSITION

JUNE 30, 2019

	Community Fund Unrestricted	Managed Fund	Endowment Fund	Restricted Fund	2019 Total	2018 Total
ASSETS						
CURRENT ASSETS						
Cash	\$ 126,063	\$ -	\$ -	\$ -	\$ 126,063	\$ 58,720
Accounts receivable and other assets	<u>37,067</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>37,067</u>	<u>24,697</u>
	163,130	-	-	-	163,130	83,417
INVESTMENTS (note 5)	762,849	1,546,136	14,804,220	1,351,634	18,464,839	16,228,575
PROPERTY, PLANT AND EQUIPMENT (note 6)	<u>11,270</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>11,270</u>	<u>12,364</u>
	<u>\$ 937,249</u>	<u>\$ 1,546,136</u>	<u>\$14,804,220</u>	<u>\$ 1,351,634</u>	<u>\$18,639,239</u>	<u>\$16,324,356</u>
LIABILITIES						
CURRENT LIABILITIES						
Accounts payable and accrued liabilities	\$ 11,234	\$ -	\$ -	\$ -	\$ 11,234	\$ 11,993
Managed funds (note 7)	<u>-</u>	<u>1,546,136</u>	<u>-</u>	<u>-</u>	<u>1,546,136</u>	<u>1,138,841</u>
	<u>11,234</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>1,557,370</u>	<u>1,150,834</u>
FUND BALANCES	<u>926,015</u>	<u>-</u>	<u>14,804,220</u>	<u>1,351,634</u>	<u>17,081,869</u>	<u>15,173,522</u>
	<u>\$ 937,249</u>	<u>\$ 1,546,136</u>	<u>\$14,804,220</u>	<u>\$ 1,351,634</u>	<u>\$18,639,239</u>	<u>\$16,324,356</u>

STATEMENT OF CHANGES IN FUND BALANCES

YEAR ENDED JUNE 30, 2019

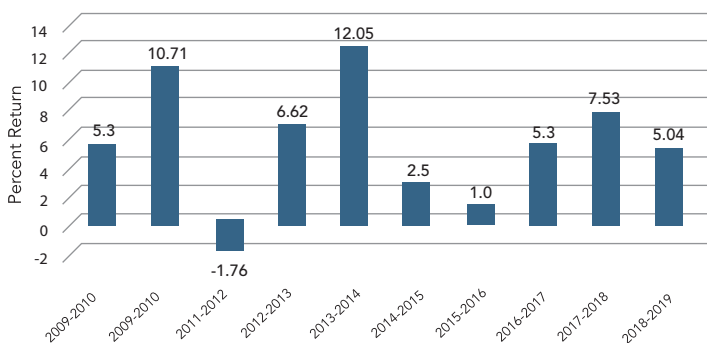
	Community Fund Unrestricted	Managed Fund	Endowment Fund	Restricted Fund	2019 Total	2018 Total
FUND BALANCES, BEGINNING	\$ 926,015	\$ -	\$12,917,596	\$ 1,329,911	\$15,173,522	\$11,864,989
REVENUE OVER (UNDER) EXPENSES	(59,418)	-	1,946,042	21,723	1,908,347	3,308,533
INTERFUND TRANSFER (note 3)	<u>59,418</u>	<u>-</u>	<u>(59,418)</u>	<u>-</u>	<u>-</u>	<u>-</u>
FUND BALANCES, ENDING	<u>\$ 926,015</u>	<u>\$ -</u>	<u>\$14,804,220</u>	<u>\$ 1,351,634</u>	<u>\$17,081,869</u>	<u>\$15,173,522</u>

STATEMENT OF REVENUE AND EXPENSES

YEAR END JUNE 30, 2019

	Community Fund Unrestricted	Managed Fund	Endowment Fund	Restricted Fund	2019 Total	2018 Total
REVENUE						
Donations and fund development (note 4)	\$ 73,110	\$ -	\$ 2,379,096	\$ -	\$ 2,452,206	\$ 2,947,878
Investment income	<u>118,876</u>	<u>-</u>	<u>595,243</u>	<u>56,850</u>	<u>770,969</u>	<u>1,243,196</u>
	<u>191,986</u>	<u>-</u>	<u>2,974,339</u>	<u>56,850</u>	<u>3,223,175</u>	<u>4,191,074</u>
OPERATING EXPENSES						
Advertising and promotion	15,109	-	-	-	15,109	24,807
Amortization	3,110	-	-	-	3,110	3,200
Automotive and travel	2,692	-	-	-	2,692	2,331
Bank charges	1,762	-	-	-	1,762	1,886
Education and training	2,618	-	-	-	2,618	1,952
Insurance premiums	6,868	-	-	-	6,868	6,340
Investment and management fees	4,826	-	71,202	7,022	83,050	71,814
Licenses, memberships and dues	11,104	-	-	-	11,104	2,838
Office supplies and miscellaneous	10,263	-	-	-	10,263	11,083
Other: Board and committee work	6,568	-	-	-	6,568	4,063
Professional fees	28,050	-	-	-	28,050	19,762
Rent	34,724	-	-	-	34,724	38,406
Wages and employee benefits	<u>184,889</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>184,889</u>	<u>183,621</u>
	<u>312,583</u>	<u>-</u>	<u>71,202</u>	<u>7,022</u>	<u>390,807</u>	<u>372,103</u>
OTHER EXPENSES						
Administrative fees (recovery)	<u>(128,959)</u>	<u>-</u>	<u>101,144</u>	<u>13,105</u>	<u>(14,710)</u>	<u>(9,499)</u>
NET REVENUE BEFORE GRANTS AND BURSARIES						
	<u>8,362</u>	<u>-</u>	<u>2,801,993</u>	<u>36,723</u>	<u>2,847,078</u>	<u>3,828,470</u>
GRANTS AND BURSARIES						
	<u>67,780</u>	<u>-</u>	<u>855,951</u>	<u>15,000</u>	<u>938,731</u>	<u>519,937</u>
REVENUE OVER (UNDER) EXPENSES						
	<u>\$ (59,418)</u>	<u>\$ -</u>	<u>\$ 1,946,042</u>	<u>\$ 21,723</u>	<u>\$ 1,908,347</u>	<u>\$ 3,308,533</u>

FUND RETURNS BY YEAR 2009 - 2019



Fund Returns include assets from our own fund families, donor designated, donor advised, field of interest and agency funds. Our objective is to provide a balance between current income and long-term capital growth through a diversified portfolio.

The WindsorEssex Community Foundation is committed to providing transparent financial information to the community. Complete 2018 - 2019 financial statements, audited by Baker Tilly Windsor LLP, are available at www.wecf.ca or by contacting the Foundation's office.



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