



# A REFLECTION OF HAMILTON

**HAMILTON COMMUNITY FOUNDATION 2018** ANNUAL REPORT

# A REFLECTION OF HAMILTON

Hamilton Community Foundation is a reflection of the community it serves – its beauty, grit, strength and resilience.

With the theme of this year's report – A Reflection of Hamilton – came an ambitious idea: To put every reader on the cover.

With some creative thinking, we're happy to say we've done just that – go and take a look.

The reflective foil on the cover invites you to see yourself within our greater mission: A vibrant, inclusive Hamilton.

We believe that every Hamiltonian has a role within this community. This year, we invite you to reflect on and consider yours.

## OUR VISION

A vibrant, inclusive Hamilton

## OUR MISSION

To drive positive change by connecting people, ideas and resources

# HAMILTON COMMUNITY FOUNDATION

Photo by Mike Kukucska

# MESSAGE FROM THE BOARD CHAIR AND THE PRESIDENT & CEO

We are pleased to report on another successful year for Hamilton Community Foundation, with donations of \$6.5 million and record-high granting and community leadership spending of \$8.2 million.

The theme of this year's report is *A Reflection of Hamilton*. You'll read stories that illustrate the multi-faceted knowledge, experiences and perspectives that Hamiltonians contribute to our work in support of a vibrant, inclusive city. You'll read about the breadth of our granting, how we're facilitating community philanthropy and about our progress on strategic goals: increasing post-secondary access, increasing the health and prosperity of Hamilton's neighbourhoods and aligning all our financial assets with our mission.

A true reflection of Hamilton means understanding both its long-standing and emerging challenges. As the latest census data and our new Vital Signs report show, our city is changing — and at an ever-increasing pace. Change presents opportunity, but also

underlines the critical importance of ensuring that the decisions we make, as individuals and as a collective, work toward a city where all citizens share equitably in their prosperity, aspirations and sense of belonging. We are proud of the work we do in this city, but it is only one aspect of a greater collaborative whole in which we all play a part.

This year, we thank retiring board member Beth Webel for her many contributions to the Foundation, including her leading role in developing the Women 4 Change initiative.

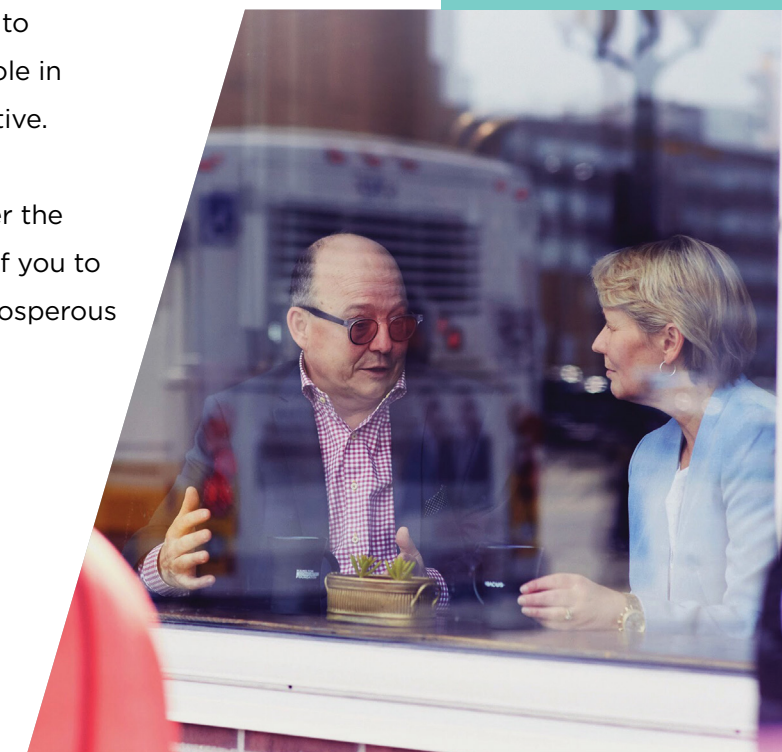
We hope this reflection of our work over the last year inspires and challenges each of you to consider the role you might play in a prosperous Hamilton for everyone.



Teresa Smith  
Board Chair



Terry Cooke  
President & CEO







## HASHTAG UNITES HAMILTON IN WELCOMING NEWCOMERS

#HamiltonForAll shares  
a message that is both  
welcoming and inclusive.

**Hanan is a high school student** who dreams of being a nurse one day. James is an electrical engineer who likes to bike from Dundas to downtown. Aref is a dedicated community volunteer who loves Hamilton's libraries. And Shahd? She's a recent marketing graduate who has discovered that the best ice cream in town is on Duke Street.

They're all immigrants to Hamilton and ambassadors for #HamiltonForAll, a campaign that helps newcomers and longer-term Hamiltonians find common ground.

"The campaign ambassadors serve as a human library," says Yohana Otite, executive director for Hamilton Centre for Civic Inclusion, which is co-leading the campaign with the Hamilton Immigration Partnership Council. "They tell their stories on our website and at schools and events so we can discover our commonalities instead of focusing on what separates us."

Myth busting is one component of the campaign. One myth is that Canada doesn't need immigrants: a 2017 University of Toronto survey shows that one in five Canadians would support an end to immigration. The fact is, according to the Conference Board of Canada, our country will need 350,000 immigrants annually by 2035 to meet its workforce needs.

Supported by an HCF grant in partnership with the Community Fund for Canada's 150<sup>th</sup>, #HamiltonForAll includes posters inviting people to post a welcome message using the hashtag and a website listing inclusive actions anyone can take. "Welcoming newcomers is usually left to settlement agencies," Yohana says. "#HamiltonForAll inspires everyone to play a role." Activities across the city are being plotted on a map launched at Hamilton's first Newcomer Day this summer.

The hashtag was trending on Twitter when the campaign launched. Since then, people and organizations have been showcasing the posters, planning events and posting on social media. The impact has been widespread and personal. As one person tweeted: "Thank you for launching a campaign like this. I cannot tell you what this would've meant to me as a child."

*The Community Fund for Canada's 150<sup>th</sup> is a collaboration between Hamilton Community Foundation, Community Foundations of Canada, the Government of Canada and extraordinary leaders from coast to coast.*



Canada





## DRUMMING UP A SOLID FUTURE

Mark helped advise Community Living Hamilton on options for its endowment earnings.

When Community Living Hamilton established an agency endowment fund with HCF in April 2016, they didn't expect it to be a teaching tool for their clients.

Like other agencies, they established the fund to support the future of their organization in perpetuity, as well as to access Hamilton Community Foundation's investment and other expertise. But when it came to making a decision about what programs to support with the earnings from the fund, they invited input from their client base.

The result was impressive.

Community Living Hamilton struck an advisory committee, made up of seven of their service users — people with a range of developmental abilities. The group began by learning what an endowment fund is (they used an image of a tree and its seedlings) and then laid out criteria for projects they might fund. They then weighed various possibilities against the criteria and, after discussion, recommended one project to the organization's board.

"I was incredibly impressed by their presentation," says Community Living Board member Judy Colantino. "It was so thorough and thoughtful. We accepted their advice unanimously."

The recommendation? To grow the money another year and then support the agency's award-winning, 35-member drum corps trip to Indianapolis, where they will represent Canada. If their rehearsals (and track record) are any indicator, the visit is sure to be an overwhelming success, thanks in no small measure to the additional funding provided from their endowment fund.



# LOOKING BACK ON A LIFETIME OF GIVING

Lifelong Hamiltonian Frank Miller has a passion for travel — he has circled the globe four times — and an equal passion for his hometown and its citizens, tirelessly giving to local endeavours that have meaning to him.

“A light went on,” says Frank when he realized that his resources were enough for him and he could indulge his philanthropic nature — a nature that was sparked by his mother when he was just a teenager. “She encouraged me as a boy to volunteer and to give away some of my earnings from my first part-time job.” Frank’s mother remained supportive of his giving until her death at 100.

Frank’s philanthropic interests are wide-ranging and he enjoys seeing his donations in action. He has an extensive collection of teddy bears and has shared this love by founding the Miller Bear Program at The Children’s Aid Society of Hamilton (CAS), through which child protection staff can give bears to children who come into care, or who are in situations where they need comfort. Dominic Verticchio, executive director of CAS, describes the impact of this gesture:

“The Miller Bears put a smile on the young faces of those who come to us as the most vulnerable and fragile members of our community.”

Through the Frank Charles Miller Fund at HCF, Frank supports nursing and medical students, St. Matthew’s House, natural heritage projects like the Cootes to Escarpment EcoPark System, and many other community efforts. He is also a longtime supporter of his church.

A successful entrepreneur, Frank wryly describes himself as “an infamous tightwad” for most of his adult life, but his record of giving belies that description. As he looks back — and ahead — he puts his philanthropy in perspective.

“The more you give away, the more you get back,” he concludes.

Frank Miller’s philanthropy is lifelong and community-wide.



# KEEPING WOMEN AND CHILDREN SAFE, IN JARED’S MEMORY

Anne (not her real name) is a respected professional in our community. She is also a victim of domestic violence who fled her abuser, only to become locked in a succession of legal battles that have put her \$100,000 in debt. No longer able to afford a lawyer, today she represents herself in court, cross-examining her abuser in order to protect her children, her job, her home, and her name. But thanks to Jared’s Place, she’s not alone.

Jared’s Place helps women experiencing violence and abuse to navigate the legal system, whether it’s an immigration, family, child protection, civil, housing or criminal matter. The free program is named after Jared Osidacz, an eight-year-old boy who was killed by his father while on an unsupervised court-ordered access visit.

“Jared’s mom went through the system and no one was helping her,” says Nancy Smith, executive director of Interval House of Hamilton. “That’s why she let us name the program after Jared.”

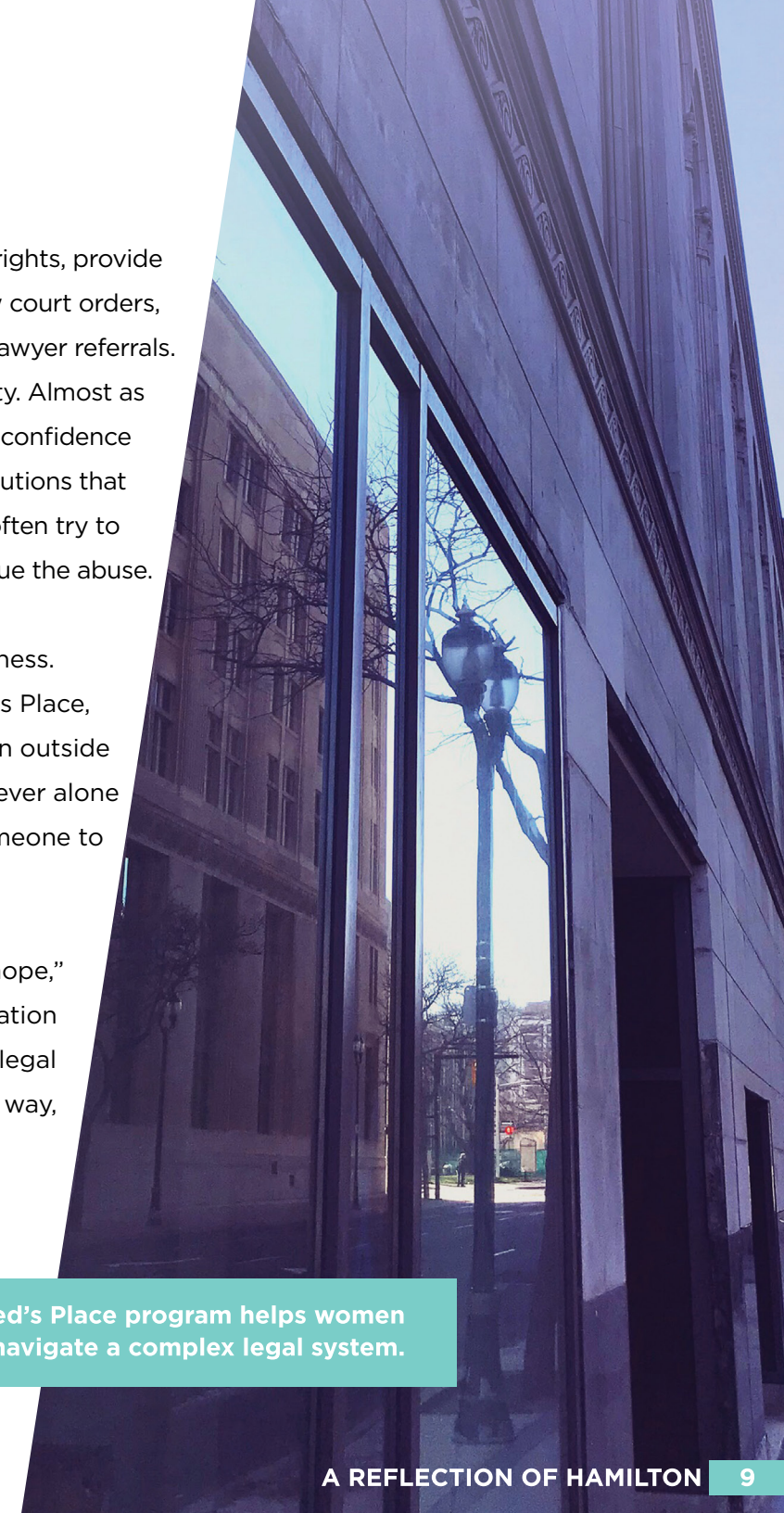
The program relies on grants and community donations. Funding from HCF helps support the legal advocate, who is a specialist in violence against women and is well-versed in the legal system. The

advocate can clarify a woman’s rights, provide information, attend court, review court orders, help with paperwork and make lawyer referrals. Safety planning is the first priority. Almost as important is building a woman’s confidence to engage with people and institutions that have power, since perpetrators often try to manipulate the system to continue the abuse.

The legal advocate is also a witness. Before Anne knew about Jared’s Place, her abuser tried to run her down outside the courthouse. Now, Anne is never alone at court and she always has someone to call.

“Jared’s Place offers a woman hope,” Nancy says. “In a traumatic situation one’s clarity isn’t there, but the legal advocate is — every step of the way, if that’s what a woman wants.”

The Jared’s Place program helps women navigate a complex legal system.







## ROBERTSHAW FUND ENSURES THE SHOW WILL GO ON

From backstage to front of house,  
community theatres benefit from  
Foundation grants.

**Alfred and Joan Robertshaw** met on stage at the Players' Guild — a love story with a legacy, thanks to the fund Joan established to honour Alfred's 40-plus years in community theatre.

"The performing arts have brought much joy to both our lives, not to mention lifelong friendships," Joan wrote at the time. "Alfred realized how important it is for such organizations to have financial support in order to encourage creativity and often foster those who go on to professional careers in the theatre."

With Joan's passing in 2013, the Alfred & Joan Robertshaw Memorial Fund continues to support the couple's passion for community theatre, as well as heritage preservation efforts in Hamilton. This year's recipients included Hamilton Theatre Inc., Players' Guild of Hamilton Inc., Theatre Ancaster and Village Theatre Waterdown.

"We really believe in community building," says Village Theatre president Corrie Giles. "We want Waterdown to be a vibrant place where people can find their entertainment close to home." Village Theatre has used its grant to build a new website, rent costumes from Stratford, support a bursary for Waterdown high school drama students, create banners and signs, construct the set of an English country house and purchase equipment. They also plan to host a professional workshop for young sound and lighting technicians.

Attracting the next generation is a priority. "We take our development role quite seriously, but we haven't always had the money to do it," Corrie says. Village Theatre encourages high school students to complete their volunteer hours learning makeup, set construction, and the technical booth. A recent production had two Grade 9 boys learning how to work the lighting board alongside a woman in her 60s. Over the 43 years that Village Theatre has existed, a number of volunteers have gone on to local and national careers in theatre.

"When the community foundation gives us money, many people share the benefits," Corrie says. "And because it is an operating grant, we have the flexibility to use it where it's needed. We can make it go a long way."





## MOVING THE FIRE FROM ONE LONGHOUSE TO ANOTHER

Indigenous art is just one  
way NYA:WEH Elementary  
connects with kids.

**They've planted corn, beans and squash.** Learned a 3000-year-old seed song. Beaded with porcupine quills, visited McMaster University and Mohawk College, made corn husk dolls, listened to stories told by elders, cooked with wild rice and learned to count lunar cycles on the back of a turtle shell.

This isn't your typical school program. It's NYA:WEH Elementary, a program co-ordinated by Niwasa Kendaaswin Teg to engage and support First Nation, Métis, and Inuit students in Grades 6, 7, and 8. Formal activities are offered during nutrition breaks and after school, and students are encouraged to drop by to smudge, sing, bead, talk or drum any time the program is available. Students from every background are welcome. On any given day, between 15 and 40 children attend.

Funding from the Foundation's ABACUS initiative supports NYA:WEH Elementary's focus on helping middle-school students successfully transition to high school and beyond. The program operates at Prince of Wales, Queen Mary and Gatestone schools. Many of the students will eventually attend Delta Secondary School, where there's a NYA:WEH high school program.

"The students are introduced to NYA:WEH Secondary staff long before Grade 9, so they already know they're safe and supported," says program co-ordinator Lauren Williams. "Once I know what high school they're going to, I take them their project box so they can transition from one NYA:WEH to the other. It's a physical representation of moving the fire from one longhouse to another."

Jake Cruickshank is an Indigenous recruiter at McMaster University and connects with the kids at his monthly visits to NYA:WEH Elementary.

"I never thought about going to university until Grade 12 and by then I had a lot of catching up to do," he says. "We're starting early to help these students see post-secondary education as an option for them."

The program builds confidence by building community. "By Grade 8, these kids know elders, people at the school board, high school staff and people at the post-secondary level," Lauren says. "They have all these people wrapped around them, like a big hug."



A woman with light brown hair is looking upwards and to the right. In the foreground, there is a display of several colorful spoons (purple, blue, yellow, and green) on a white surface. The background is slightly blurred, showing what appears to be a museum or gallery setting with warm lighting.

## A NEW GENERATION OF PHILANTHROPY

For Yvonne Farah,  
Hamilton is always home.

**Hamilton is always home for Yvonne Farah.** Having grown up here, she now promotes the Hamilton story to members of her international MBA program. She's also feeling her way into her personal direction in philanthropy — a legacy from her parents Elham and Joseph Farah, who established an HCF fund in 2005 that focuses on peace education and supports the YMCA's Peace Medal program. Yvonne has been involved with those efforts for several years and has begun exploring additional avenues for strategic philanthropy as a contributor to the Foundation's Women 4 Change initiative.

Even with a firm grounding in her family's tradition of giving, she says that as a "borderline millennial" the idea of philanthropy can be daunting, but it needn't be. That became clear through her affiliation with Women 4 Change.

"I realized that we do things every day, like mentoring a younger person, without labeling those actions philanthropic," she says. "I'm so impressed and touched by the women in the group and the work that they do."

Getting to see HCF's expertise in action has been exciting to Yvonne. She is hoping to become more involved once she finishes her MBA in June and returns full-time to Hamilton and her family's convenience store business. Even with her international focus, "home is home," she says. "There's always a connection." The Farah tradition of philanthropy is alive and well in the next generation.





## SENIORS' PROGRAM DELIVERS MUCH MORE THAN A MEAL

Active, healthy seniors is the  
goal of St. Matthew's House  
program.

**When serious complications** from a quadruple bypass left Bonnie in a wheelchair and confined to home, every day presented the same difficult choice: order in from a restaurant she couldn't afford, or not eat at all. All that changed when she learned about a free home food delivery program, co-ordinated by St. Matthew's House, which helped her get back on her feet. Literally.

Referrals to the food delivery program mostly come from seniors themselves, who are told about the program by the Hamilton Police Services seniors' support team, the community paramedic program or another food bank. A grant from the Edith H. Turner Foundation Fund makes sure participants receive seven days of food with each delivery. Those with special dietary needs or who have no way to store or cook food are given nutritional products such as liquid meal replacements.

The food, however, is only the beginning.

"Seniors call us because they have an immediate need — hunger. But what makes our program unique is that we marry food bank supports with intensive case management," says interim co-executive director Karen Randell. "We don't just deliver the box of food and leave. Our program staff are trained to explore what other needs the senior may have. Our ultimate goal is to improve the quality of life for the seniors we work with."

Visit by visit, the food delivery team is able to develop a rapport and connect the senior to resources, including the St. Matthew's Senior Centre, which provides weekday meals, weekend care packages, social activities and a medical clinic. "We start with preventing food insecurity and end with improving quality of life," Karen says.

Which brings us back to Bonnie. Once she started attending the senior centre's programs, she no longer needed home food delivery. Eventually, she no longer needed her wheelchair or walker. "I've come alive coming here," she says.



# COMMUNITY LEADERSHIP

Bringing people together on issues that affect Hamiltonians is one way the Foundation drives positive change.

Our strategic goal is to increase the health and prosperity of individuals and neighbourhoods.

## ABACUS

ABACUS is HCF’s ten-year Community Fund granting and leadership focus. Its goal is to increase Hamilton high school completion and post-secondary access rates by focusing on students in Grades 6, 7 and 8. Its three components are:

- Grants to local programs that 1) increase students’ interest and readiness for post-secondary education, and 2) expand Hamilton’s capacity to better meet the needs of students during these pivotal years.
- Grad Track, a pilot program delivering more intensive programming to a small group of students who may face multiple barriers.
- Bringing partners together to identify and address systemic barriers to post-secondary education, through policy and other changes.

Since 2015, granting to 29 programs has reached 6,450 Grade 6, 7 and 8 students across 35 schools — approximately 37 percent of all Hamilton’s middle-school students. Outcomes reported to date include improved grades and behaviour, increased engagement, self-confidence and awareness of post-secondary options, and leadership development. Over 270 parents and 360 educators/mentors have also connected to these programs.

ABACUS Small Grants for Teachers was introduced in 2016 to support teacher-driven enrichment activities for middle-school students and last year helped to fund 79 projects in 70 schools.

Grad Track has entered its second year at Hillcrest Elementary School in the city’s public board, and St. Patrick’s Elementary in the Catholic board. HCF funds a “learning coach” to work in and out of school with 40 students to explore their interests, inspire and further their thinking about post-secondary education. This year, Grad Track also addressed the need for learning continuity by providing programming throughout the summer, as well as pairing the students with a camp related to their aspirations.

HCF received wonderful news this year when the Higher Education Quality Council of Ontario awarded us with an eight-year commitment to fund a longitudinal evaluation of Grad Track throughout high school, graduation and into post-secondary education. This evaluation will provide insights that can inform many aspects of our educational granting.

At a systems level, HCF’s ABACUS experience has led to identifying three systemic barriers to post-secondary access for further exploration: streaming, suspensions and core competencies — e.g. how social/emotional learning and quality learning environments affect student engagement. In partnership with Hamilton’s two school

boards and organizations like People for Education, we are continuing to investigate the impact of issues like these, along with potential policy solutions.

## Increasing the reach of bursaries and scholarships

HCF is home to over 20 bursary, scholarship and fellowship awards, including the Chaney-Ensign Bursary, which has supported over 900 graduates of Hamilton secondary schools to go on to post-secondary education. This year the Foundation reviewed its academic awards with an eye to improving process and increasing applications to these important financial supports.

As a result, through a dedicated program of outreach including social media, application numbers doubled for the Chaney-Ensign Bursary. All eligible applicants to this program received support from the Foundation, totalling over \$65,000. A new online platform will be launched later this year, making it easier for students to apply.

This year, HCF also launched its newest bursary program, the Chedoke Health Foundation Bursary. It brings to life the vision of the fund’s advisory committee, and provides financial assistance to Hamilton students who have been recommended by the two school boards for their demonstrated passion and commitment towards a career in health care.

## Neighbourhood Leadership Institute (NLI)

The NLI enhances the skills of Hamilton’s neighbourhood and community leaders, offering learning streams for both residents and people employed in community development.

Learning for participants in the resident stream includes developing a project idea for their neighbourhood. On successful completion, they receive a college credit and may also apply for an HCF grant to help launch their project. Over 100 residents have graduated, with many returning to co-facilitate the program. This year, graduates also supported incoming participants and their projects through a new NLI alumni residency program.

## (RE) Imagining NAS

The City of Hamilton’s Neighbourhood Action Strategy (NAS) focuses on helping neighbourhoods be great places to live. In 2016 as the program approached its five-year mark, HCF was asked to lead a review of NAS, with the overarching goal of determining the best ways for NAS to continue being a relevant, effective and supportive resource to neighbourhoods and residents.

The Foundation worked closely with residents from development to communication, gathering input and providing feedback, in a collaborative effort to ensure that an inclusive range of perspectives, voices and ideas were brought to the consultation. Part I of the project developed the vision and foundational principles that will guide NAS’s future neighbourhood involvement; Part II is ensuring that structures and operations match the articulated vision. The project is expected to be completed this fall.



# FUNDS AND DONORS IN 2017-18

People who give to Hamilton Community Foundation share the desire to make a difference for Hamilton, forever. Donations to HCF are pooled and invested; investment income is the primary source for making grants.

As a Foundation donor, you can create your own fund or give to an existing one. We are pleased to work with you and your professional advisor to find the approach that meets your goals and circumstances. Call us at 905-523-5600 or visit [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca) for more information.

Amounts, when shown, reflect each fund’s balance. Amounts granted from these funds are identified in the grants by fund type list beginning on page 36.

## COMMUNITY FUND

Giving to the Community Fund provides HCF with the greatest flexibility to respond to Hamilton’s needs. Donations of any amount are welcome. Donors whose accumulated endowed donations total \$5,000 may choose to have a named fund within one of four Community Funds: Unrestricted, Arts, Environment or Smart & Caring. All donations to the Arts or Environment funds will be matched by the Foundation on a one-to-one basis up to \$1 million. The individual funds are listed below and the amounts include matching funds, where indicated.

### COMMUNITY FUND: UNRESTRICTED FUND

This fund is used to address the highest charitable priorities in the community.

#HamOntForever Fund	5,000	Annie S. Nieman Fund	36,081	Charlotte Cauley Fund	34,987
A. May Davis Fund	41,598	Averil Gray & Florence Gray Fund	1,172,308	Christina Cooper Fund	173,405
A.H. Tallman Bronze Co. Ltd. Fund	21,790	Bertha Savage Fund	47,806	Christina I. Hammant Fund	250,000
Alfred Charles & Pearl Gertrude Swanwick Fund	200,000	Brenda & Reg McGuire Fund	5,150	Clare B. Hunter Fund	13,079
Alice Redman Gooch Fund	25,025	Brenda Morris Fund	5,000	D. Argue Martin Fund	20,340
Alice Vera Morgan Fund	338,065	Cameron K. MacGillivray Fund	9,325	<b>Dan and Helen Geagan Fund</b>	<b>20,174</b>
Alphonse Dirse Fund	48,344	Caroline May Alvey Fund	118,000	Daniel T. Lawrie Fund	115,529
Anne M. Biggar Fund	460,327	Catherine C.H. Murray Fund	50,050	Donald A. Cooper Fund	40,126
		Charles & Catherine Ralph Fund	43,131	Donald & Alice Cannon Fund	13,425

Funds shown in bold were established in 2017-18

Donald H. Henderson Fund	408,597
Donald J. Allan Fund	103,514
Doreen & Gordon Birk Fund	98,409
Doris M. Allen Fund	172,918
Dorothy & Travice Broadbent Fund	7,000
Dorothy Cauley Fund	78,831
Dorothy I. Linfoot Fund	20,588
Dr. Alexander A. Numbers Fund	5,844
Dr. Carl Martin Memorial Fund	5,000
Dr. Ronald P. Graham Fund	16,814
E. Francis Dennee Fund	24,322
Edna E.R. Reeves Fund	78,766
Edna Fern Flewelling Fund	29,761
Edna Robertson Memorial Fund	29,000
Eleanor Foster Fund	869,072
Eleanor Jean Milton Fund	63,610
Eleanor M. Smith Fund	10,000
Elizabeth Lee Fund	11,775
Elizabeth Mary Hamilton Fund	30,000
Elsie M. Husband Fund	12,300
Erie Hossack Fund	58,638
Erma Z.L. Goering Fund	888,437
Ernest & Ruth Brunton Fund	27,000
Ethel H. Prouse Fund	181,684
Eulalia D. Wall Fund	170,977

Evelyn & Richard Geraghty Storms Memorial Fund	25,000
Evelyn Patricia Lyons Fund	5,000
Fell Family Fund	36,065
Flora L. McNeil Fund	30,165
Florabel Condry Fund	25,000
Frances W. Ambrose Fund	5,600
Francis Spence Hutton Fund	32,650
Frederick J. Mills Fund	26,189
Gallagher Family Fund	72,700
Gilbert P.V. Belton Fund	175,088
Gladys A. Whittaker Fund	26,205
Gordon & Ethel Holmes Fund	97,572
Grace J. Smith Fund	13,030
<b>Hanna &amp; Joseph Dubeck Fund</b>	<b>5,000</b>
Harold E. Clarke Fund	86,120
Harvey and Audrey Smith Fund	544,860
Helen Gertrude Harrison Fund	34,222
Helen Mary Archambeault Fund	25,316
Henrietta F. Campbell Fund	104,959
Herbert P. and I. Flora Frid Fund	354,466
Horace A. Bennett Fund	10,000
Howard & Edna Tugman Memorial Fund	100,000
Ian & Donna Cowan Fund	5,650
Irene Caldwell Memorial Fund	10,000
J.M. Walter Hahn Fund	5,000

Jack A. Winser Fund	155,007
Jack McNie Fund	26,000
James & Irene Wilson Fund	6,000
James & Mary Phin Fund	106,545
James D. Redmond Fund	6,033
Jane Milanetti Fund	12,150
Jessie Rumney Fund	10,000
Joan W. Rutherford Fund	5,000
John and Joan Bothwell Fund	10,000
John H. Frid Fund	548,347
John Shea Memorial Fund	8,387
Josephine Magee Fund	204,057
Kathleen L. McBride Fund	11,632,794
Kathryn Jones Fund	20,186
Lakin Family Fund	13,430
Laurence Cholwill Patterson Fund	351,146
Leanora M. Spicer Fund	26,600
Lillian Boyd Barnby Fund	10,000
Lindsay M. McLennan Fund	78,022
<b>Lois G. Greenall Fund</b>	<b>115,000</b>
Lulu Blanche Hart & Harry Utter Hart Memorial Fund	778,782
M. Jessie Chagnon Fund	71,196
Mabel Beatrice Studd Fund	15,000
Mabel D. Leadlay Fund	75,891
Margaret & William Gilmour Fund	8,380
Margaret Anne Hayward Fund	797,598



Margaret E. Tschetter Fund	383,739
Marjorie L. Allan Fund	5,000
Marjorie Wild Fund	30,724
Marnie & Bill Brehm Family Fund	36,000
Marnie Spears Fund	21,070
Martha McKinnell Serrels Fund	94,682
Mary & Earl Brooks Fund	1,354,969
Mary E. Hatch Fund	116,000
Mildred E. Hunter Fund	100,878
Mount Hamilton United Church Legacy Fund	20,000
Noreen & Seymour Wigle Fund	15,000
Patricia Eileen Smith Fund	5,150
Peter & Rose Marie Palmer Fund	6,785
Petra Cooke Memorial Fund	30,100
Project Sunday Fund	8,771
Ralph E. Ingraham Fund	16,017
Ralph W. & Evelyn J. Cooper Fund	151,000
Renate & Bob Davidson Fund	10,000

Reynolds Family Fund	139,439
Robert C. & L. Ann Glass Fund	100,000
Robert D. Crockford Fund	14,075
Robert George Sparre Fund	34,410
Robert J. & Joan Harrison Fund	10,266
Robert P. McBride Fund	1,636,012
Royal Hamilton College of Music Faculty Fund	5,963
Russell & Mae Lindley Fund	10,400
Ruth G. & Fred J. Spencer Fund	23,000
The Samuel & Dora McFarlane Fund	14,000
Samuel Ringer Fund	70,586
Sandra & John Black Fund	149,386
Sarah Smith Fund	230,729
The Spectator Fund	10,000
Stewart Philp Fund	45,000
Tim and Dale Langs Fund	164,051
Tod Laing Fund	7,950
Vangie M. Crosthwaite Fund	40,000

Vera M. Elwin Fund	536,235
Vincenza Travale Fund	20,200
W. Jones Fund	25,920
West-Moynes Fund	8,500
Wheeler Family Fund	9,900
William F. Brand Fund	8,404
William Gordon Kitchener Fund	60,000
William S. Sparham Fund	25,236

## COMMUNITY FUND: ARTS ENDOWMENT FUND

This fund addresses needs and priorities in Hamilton’s arts sector. As of March 31, 2018, donations totalling \$34,688 have qualified for a matching contribution.

Gail Robinson-Gow Fund	58,501	Accumulated donations under \$5,000	875
Linda Towart Arts Endowment Fund	10,000	Matched donation total	69,376

## COMMUNITY FUND: ENVIRONMENT ENDOWMENT FUND

This fund supports a range of initiatives and organizations that work toward Hamilton’s environmental well-being. As of March 31, 2018, donations totalling \$331,207 have qualified for a matching contribution.

Irene Emilie Lowes Estate	21,493	The Young Fund	15,145
Robert D. Crockford Fund	28,120	Accumulated donations under \$5,000	18,646
US Steel Canada Environment Endowment Fund	600,000	Matched donation total	683,404

## COMMUNITY FUND: SMART & CARING FUND

This fund supports enhancing academic, community and environmental factors that enable educational access and success for Hamiltonians.

Accumulated donations under \$5,000	1,000
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## FIELD-OF-INTEREST FUNDS

These funds enable donors to support a specific area of interest to them (e.g. the environment, children's needs, the arts, etc.).

The Foundation selects appropriate grant recipients each year.

Alfred & Joan Robertshaw Memorial Fund	940,693	Community Health, Education & Research Fund	1,777,404	George & Shirley McBride Foundation Fund	1,483,621
The Alice Jean Ainsworth Memorial Fund	2,261,667	Dorothy & Frank Bliss Fund		Gibson Trust/Town of Flamborough	48,509
The Angel Fund*	166,870	Mary S. & James P. Phin Respiratory Disease Research Fund		Giovanni & Grazia Criminisi Literacy Fund*	47,795
Antonina Lombardo Fund	202,979	McGregor Clinic Fund		The Glenn & Sidney Sellick Fund	14,685
Arthur & Helena Lemon Fund	141,378	Delaware Fund	519,118	Hambro Fund	57,106
Barbara & Bob Harwood Fund	236,554	Dougher Community Fund	3,531,004	Hogarth Family Pioneer Energy Fund	1,590,010
Barbara Bethune Fund**		Edward & Gladys Halloran Memorial Fund	1,105,828	Ike & Shahnaz Ahmed Foundation Fund	47,855
Barbara Farnan Fund	178,068	First Place, Hamilton Tomorrow Fund	356,749	<b>James Walker Culhane Trust Fund</b>	<b>391,335</b>
Betty & Jack George Family Fund	36,554	Florence E.S. Hutton Fund*	641,191	Jane C. LeWarne Fund	25,216
Bill & Tina Seale Fund	411,356	Foxcroft Family Youth Fund	37,653	Jeanne Scott Fund*	1,328,187
Board Leadership Fund	29,239	Fund for Underprivileged Children	645,288		
Carolyn A. Milne Leadership Forum Fund	72,313				
Charles & Ret Swire Fund	265,252				

\*These funds contribute to the Community Fund  
† The donor has chosen not to disclose the fund balance

Joan C. Watt Memorial Fund	51,345	Ray Lowes		Terry & Brenda Yates Fund	1,185,996
Kenneth Boothe Young & Marie Catherine Young Fund	1,659,098	Environmental Fund	568,030	The Van Dusen Fund*	592,725
Lillian M. Shaw Fund	403,405	Royal Canadian Humane Association Fund	98,830	Vera & Percy Tomlinson Fund	133,984
Marchese Health Care		Russell I. Elman Fund	2,168,032	W. Robert & Marion S. Shivas Conservation Trust Fund	423,934
50th Anniversary Legacy Fund	67,239	School Sisters of Notre Dame Legacy Fund†		Women 4 Change Fund	214,980
Mary Lauder Cassidy Fund	351,904	Shirley M. Elford		Youth & Philanthropy Fund	200,641
Nelson Allan Fund	198,765	Gift of Today Fund	152,674		
Note-Able Music Fund	83,984				

## ONTARIO ENDOWMENT FOR CHILDREN & YOUTH IN RECREATION FUND

This fund's balance includes matching funds from the Province of Ontario in 2002 to encourage the participation of children and youth in recreation.

Anonymous fund	The Foxcroft Family Fund	Morgan Firestone Foundation Fund for Youth
Bank of Montreal Fund for Children & Youth in Recreation	Gallagher Family Fund	Mr. & Mrs. Colin S. Glassco Fund
The CHML Children's Fund	Hamilton – Hydro Electric Company Fund	Pioneer Energy Fund for Children & Youth
The Clark Family Fund	The Hamlin Family Fund	PricewaterhouseCoopers LLP Hamilton Children and Youth Millennium Fund
The David Gow Fund	Judith & Peter McCulloch Fund	TD Bank Financial Group Fund
The Deslauriers Fund	The Junior League Centennial Endowment Fund for Youth	Zonta Club of Hamilton 1 Fund
The Emma Templeton Fund	The Mildred E. Hunter Fund	Other donations under \$5,000
		<b>Fund balance</b>
		<b>1,311,941</b>



# DONOR-ADVISED FUNDS

These funds enable donors to recommend the charitable organizations or programs that will receive grants.

Anonymous funds	1,121,328
Apollo Fund†	
ArcelorMittal Dofasco Children and Youth Fund	85,722
Audrey & Alan Moffett Fund†	
<b>Bisaro Family Fund*</b>	<b>71,129</b>
Chedoke Health Foundation Fund	5,604,149
Clark Family Foundation Fund	1,391,810
<b>David Davis Memorial Fund†</b>	
Dr. Bob & Mildred Kemp Palliative Care Education Fund	55,019
Dufresne-Ray Family Fund†	
Ed Smee Conserver Society Environmental Fund	52,350
Edith H. Turner Foundation Fund	12,532,463
Elham & Joseph Farah Family Foundation Fund**	
Ella Baird & Grace Baird McQueen Memorial Fund/ A.J. McQueen	62,928
Fengate Community Foundation Fund*	1,308,503
The Gilmour Fund	221,979
Glen & Debra Swire Fund	76,458

Great Lakes Trust Fund*	25,718
Heather & Ross Hamlin Fund*	12,701,429
Heels Family Vocal Award Fund*	393,343
Hogarth Family Foundation Fund	3,452,464
Hugh C. Arrell Memorial Fund	53,782
Hundred Waters Foundation Fund*	40,368
Hutton Family Fund**	
Jeremy Hepner Fund	27,658
John & Esther Marshall Memorial Fund	327,415
John & Mary Reesor Fund	195,107
Karen & Peter Turkstra Family Foundation Fund†	
Kathleen C. Nolan Education Fund	50,794
Kirkpatrick Fund	58,325
Lawyers’ Legacy for Children	437,741
Lee Hepner Award Fund	37,161
Lillian & Marvin Goldblatt Family Fund	301,901
Lois Evans Natural Heritage Fund	138,059

Losani Family Foundation Fund	362,836
The Malloch Foundation Fund	761,550
Mark & Barbara Nimigan Fund	144,230
The Martin Foundation Fund	1,579,908
Mayberry Family Fund*	270,278
McCallum, McBride Fund	1,229,112
Meredith Family Fund	32,912
Michael Chamberlain Fund	172,758
Mildred Dixon Holmes - Youth Orchestra Fund	371,932
The Milne McGrath Fund	1,067,899
Ray Brillinger & Cy Hack Fund	57,575
The Ron & Gina Fraser Endowment Fund	153,976
Rotary Club of Hamilton East-Wentworth Foundation Fund	124,416
Shirley M. Elford Artist’s Fund	59,781
Stover Family Fund†	
Tara Lynn Giuliani Foundation	303,419
Thorne Family Fund	41,556
Tran Family Fund*	46,014
W. L. Carpenter Memorial Fund*	2,834,597
Williams Family Fund*	100,022
The Young Fund*	40,252,094

# DESIGNATED FUNDS

These funds benefit specific charities named by the donor.

Art and Barb Worth Fund	155,364
<b>Barbara and Ronald Bayne Fund</b>	<b>90,684</b>
Cygnus Fund	186,515
Douglas J. Clark Fund*	169,003
Eva Rothwell Resource Centre Fund	112,356
Frank Charles Miller Fund*	2,523,682

James P. & Mary S. Phin Charitable Fund	275,629
Joe, Filomena and George Seliga Holdings Fund†	
Phenix Fund for Animal Welfare	149,243
PHOG Endowment Fund	399,787
<b>Porto Family Fund†</b>	

Samaritans’ Tithe Fund	337,191
Stoney Creek Health Fund	961,495
<b>United Nations Culture of Peace Hamilton Fund</b>	32,016
United Way Fund/ Kenneth R. Walsh	227,960
Walter & Mildred Danby Fund*	620,697

# SCHOLARSHIP AND BURSARY FUNDS

These funds assist and encourage students, including those challenged by education costs.

Albert & Betty Walters Fund	87,605
Amanda Marie Cowan Memorial Scholarship Fund	33,770
Bernie Morelli Memorial Bursary Fund	35,951
Charlie and Mabel Duncan Memorial Bursary Fund	35,951
Christina Hamilton Scholarship Fund	59,279
Cowan Family Fund	30,773
CPRS Hamilton Legacy Fund	37,407

Daniel Giannini Fund	1,284,059
Eugene B. Eastburn Fellowship Fund	1,179,046
General Bursary Fund/ Genevieve A. Chaney & Cordelia C. Ensign	1,022,395
Geritol Follies Bursary Fund	216,952
Howard Fairclough Organ Scholarship Fund	75,950
James Darby Bursary Fund	465,125
Jervis B. Webb Company of Canada Scholarship Fund	350,923

John E. VanDuzer Scholarship Fund	49,362
Mildred Dixon Holmes - Artist of the Year Fund	41,601
Music Bursary Fund	51,814
Ross F. Webb Bursary Fund	89,510
Rundle Foreign Study Bursary	56,220
Russell & Elizabeth Lindley Fund	208,085
William Allison Haynes Fund	119,741



# AGENCY ENDOWMENT FUNDS

These charities have established funds to provide a permanent source of income.

AbleLiving Services Inc. Mary Traini Legacy Fund	140,842
Art Gallery of Hamilton- Building a Legacy Fund	277,399
Bay Area Science & Engineering Fair Fund	36,629
Canadian Warplane Heritage Museum Endowment Fund	35,954
Cancer Assistance Program (CAP) Endowment Fund	42,868
Catholic Children's Aid Society - Ersilia Dinardo Scholarship Fund	65,411
Catholic Children's Aid Society - Ralph and Rose Sazio Scholarship Fund	158,219

Children's International Learning Centre Endowment Fund	108,563
Community Living Hamilton Endowment Fund	135,953
Dr. Bob Kemp Hospice Endowment Fund	140,646
Dundas Valley School of Art Endowment Fund	98,929
Hamilton Naturalists' Club:  Conservation & Education Endowment Fund	64,555
Ecological Research Endowment Fund	40,919
Habitat Preservation Endowment Fund	246,662

Hamilton Public Library Library Legacy Fund	941,376
HWDSB Foundation Endowment Fund	723,321
Interval House (Hamilton) Freedom and Hope Fund	117,770
The RHLI Endowment Fund	248,536
Rotary Club of Hamilton- Rotary Forever Fund	106,998
Scouts Canada, Hamilton Wentworth Endowment Fund	217,163
United Way Tomorrow & Forever Fund	1,697,473
YWCA Hamilton Endowment Fund	960,540

# FUNDS HELD ON BEHALF OF OTHERS

Other charities have placed these funds with HCF for long-term investment.

Burlington Community Foundation Fund	9,408,419
Hamilton Public Library Funds	1,680,431

# FUNDS IN PROGRESS

Donors interested in working with HCF may choose to build their funds gradually.

Bruce Hamilton Family Fund*
Bruce Trail Conservancy Endowment Fund
Conducive Fund
Cooke Family Fund*

Dream Weaver Fund
Jeff Dickins Memorial Fund
Marjorie Hawkins Clark Fund
Mark Preece Family House Endowment Fund

Revolution Hope: Claire Lewis Foundation Fund
Robert P. Beres Fund
Sons of Italy Hamilton Trieste Lodge Legacy Fund

# ADMINISTRATION FUNDS

These funds support the administration of the Foundation's community leadership, development, granting and communication programs.

Anonymous fund	14,017
Brenda & Terry Yates Fund	115,208
Cameron K. MacGillivray Fund	29,801

<b>Dr. Robert &amp; Helen Lofthouse Fund</b>	<b>49,776</b>
Judith & Peter McCulloch Fund	45,945
Judith McCulloch Tribute Fund	12,804

Marjorie & Bill Nelson Fund	114,992
Ross & McBride, LLP Fund	25,990
Thérèse & Kent Newcomb Fund	11,608



# FLOWTHROUGH FUNDS

The capital and income from these funds are distributed over time.

#HamOntForever Fund	Hamilton Spectator Summer Camp Fund	Pioneer Energy Foundation
Ambery Fund	Maple Leaf Centre for Action	School Nourishment Fund
Creative Arts Fund	on Food Security Fund	True Sport Fund
Ellen Creaghan Fund	Marlies & Alan Clark Fund	
Hamilton Prosperity Fund	Payne Fund	

# LIFE INSURANCE POLICIES

The Foundation owns and is beneficiary of life insurance policies donated by Judith McCulloch, Joan VanDuzer, Ronald J. Zabrok and two anonymous donors.

Total face value: \$870,000

# ESTATES AND FUNDS UNDER TRUSTEE ADMINISTRATION

At the time of publication, the Foundation had been notified of a charitable donation (subject in some cases to the life tenancies of others) in the following estates or trusts: Roger Gilles Brabant, Joyce Clark, James Walker Culhane, Lois Glenn Greenall, John Dennis Holmes, Mary Joan Bonner Renison, Tina Sophia Seale, George Kookson Seliga, Dorothy Ann Smith, Maria Swarchuk, Filomena Szeliga, Vincent Michael Wagar.

# COMMUNITY LEADERSHIP PROJECTS

These projects include HCF’s own community leadership activity, as well as projects where we act as an intermediary to assemble funding for multi-organizational community initiatives. The projects may span multiple years, and are funded by new donations as well as by Board-directed funds; this list represents current year funders.

City of Hamilton	Higher Education Quality	Mohawk College
The Fairmount Foundation	Council of Ontario (HEQCO)	The Winnipeg Foundation

In addition to those who support HCF’s Community Fund, we would like to acknowledge those who have made a direct financial contribution to ABACUS in 2017-18: The Fairmount Foundation, Hogarth Family Foundation Fund and Dr. Henry & Betty Muggah.

# DONORS

We thank the following for their donations this year:

AbleLiving Services Inc.	Judith Barlow	Mary Buzzell	Robertson Collins
James Ambrose	JoAnne Barresi	Daniel K. Calder	Community Foundations of Canada
Jane Anderson	Philippe & Mary Barrette	Canada Company	Connor, Clark & Lunn Private Capital
Jill Anderson	Barbara & Dr. Ronald Bayne	Alice A. Cannon	Terry Cooke & Maureen Wilson
Peter Angelou	Kristine Beaupré	Janet E. A. Cannon	William Cooke
Maria Antonakos	Bike for Mike supporters	Paul & Sara Cannon	Dr. Justin & Jessie Cooper
Annette Aquin & David Malcolm	Charles & Roswitha Bisaro	Jane Capell	Chantal Copithorn
ArcelorMittal Dofasco Inc.	John & Sandra Black	Richard & Carole Capling	Georgia Corkins
Arizona Science Center	Janet Booy	Antonio Carlos	R. Ian Cowan
H. Anthony & Anne Arrell	Bill & Marnie Brehm	Fred & Sharon Charters	Diane Cranston
The Honourable Mr. Justice Harrison Arrell & Diane Arrell	Ray Brillinger & Cy Hack	Rita Chiarelli	Robert D. Crockford
Heidi Balsillie	Hazel M. Broker	Ann Christie	Amy-Willard Cross
Katherine Barclay	Joanne Brown	Benjamin J. Ciprietti	Margaret Cunningham
	Ernest & Ruth Brunton	Alan & Marlies Clark	



Francina Cunnington  
Ray Cunnington  
Warren & Jean Currie  
Dr. Juliet Daniel  
Ryan W. Daum  
Bob & Renate Davidson  
Ron Davidson  
Joyce Dej  
Paul R. Dekar  
William M. & Susan J. Dell  
Terry & Grace Diffey  
Dillon Consulting Limited  
Anthony & Marie DiSilvestro Sr.  
Kevin & Karen Dore  
Patrica C. Doyle  
Hanna & Joseph Dubeck  
Dundas Valley School of Art  
Chris Dunn  
Sandra L. Edrupt  
John & Mary Anne Ellis  
Marion Emo  
Allan Enriquez  
William Ernst  
Dr. Bill & Jane Evans  
Lois Evans  
The Fairmount Foundation  
James V. & Joyce Falco  
Kate Feightner

Don Fell  
Carol A. Fernandes  
Frank & Lydia Fitz  
Brent & Sally Foreman  
Craig Fraser  
Margaret Freeborn  
Freedom 55 Financial  
Patricia Fulton  
Thomas & Joan Gallagher  
Tim Galvin  
The Garden Club of Hamilton  
Genesee Martin Associates  
Paul Gibel  
Alison Gibson  
Dr. Jennifer Gibson  
Marian E. Gibson  
Mary S. Gilmour  
Richard & Justine Giuliani  
Juanita Gledhill  
Sarah Glen  
Susan Goodman  
Tanis Hall  
Tegan Hall  
Brian & Morag Halsey  
Hamilton Gallery of Distinction  
Hamilton Law Association  
Hamilton Lawyers' Club  
Hamilton Lawyers' Show

Bruce & June Hamilton  
Hamilton-Halton Home  
Builders' Association  
Hamilton-Wentworth District  
School Board Foundation  
Annette Hamm  
Barbara Harwood  
Ruth Hatch  
JoAnne Haynes  
Dr. Joan B. Heels  
Linda Helt  
Rob & Tami Henderson  
Patricia Rolston Hepner  
Higher Education Quality  
Council of Ontario (HEQCO)  
Marilyn Hills  
Dr. Andria Hoda  
Margaret Holton  
Wendy J. Hough  
Humphrey Funeral Home  
Dean Jeffries  
Shirley A. Johnson  
Kathryn Jones  
Anju Joshi  
Greg & Danielle Kaiser  
Tom & Dr. Sarah J. Keating  
Helen Kirkpatrick  
Rob & Melissa Klaver  
Marinus J. Kok

Alyssa Lai  
Ann Laidlaw  
Paul & Pam Lakin  
Stuart Laurie  
Catherine Leslie  
William & Joan Levan  
Angel Li  
Celeste Licorish  
Lodge of the Ancient  
Landmarks  
Losani Family Foundation Fund  
supporters  
Joan Lowry  
Clara Lu  
Bill & Anne Lupkoski  
John MacDonald & The  
Honourable Madam Justice  
Susan Greer  
E. Shirley Macnamara  
Dr. Ian Malcolm  
Paulette Malcolm  
John Mann III  
Maple Leaf Foods  
Elizabeth Mason  
Judy D. McCormick  
Sheila M. McDougall  
Dr. Don & Kathryne McLean  
Gordon McNulty

Rev. Alan & Maureen  
McPherson  
Archie J. McQueen  
Bernice E. McRae  
Virginia Megin  
Grahame & Sheree Meredith  
Katherine Meredith  
Megan Meredith  
The Honourable Madam Justice  
Jane A. Milanetti  
Frank C. Miller  
Paul & Carolyn Milne  
Alan Moffett  
Alex & Heather Moroz  
Dr. Henry & Betty Muggah  
Sarah M. Murphy  
Joan Nathanson  
Joyce Neal  
Christine Neill  
Angie Nesci  
Barry & Nancy Nicol  
Dermot P. Nolan  
Shiran Noseworthy  
Erin O'Neil  
Kaitlyn Orovan  
Chryslyn Pais  
Peter & Rose-Marie Palmer  
Michael Parente  
Jennifer Pearson

Shirley Picken  
Steve & Mary Prime  
Judith Pyke  
Carol Rand  
Gail Rappolt  
Diane Rawsthorn  
Jim Ray & Annette Dufresne-  
Ray  
RBC Foundation  
Gail Robinson-Gow  
Barbara E. Rogers  
The Ronald K. Fraser  
Foundation  
Rotary Club of Hamilton  
Sunshine Fund  
Nancy K. Rundle  
John & Dr. Leila W. M. Ryan  
Bob & Peggy Savage  
Jane Savage  
Sandy J. Schwenger  
Stan & Keitha Seneco  
Simpson Wigle LAW LLP  
John & Toni Simpson  
John Simpson  
Rama & Rekha Singh  
Teresa Smith  
Social Planning & Research  
Council of Hamilton (SPRC)  
Marnie Spears  
Victoria Staite

Sandra Stephenson  
Marta Stiteler  
Charles & Ret Swire  
Glen & Debra Swire  
Dr. Lewis Tauber & Lori Dessau  
Tauber  
Gregory N. Taylor  
Rose Taylor-Weale  
Anne Tennier  
Thirteenth (XIII) Regiment  
Foundation  
Joshua E., Amy & Liam Thorne  
Patricia Timson  
Douglas A. Tod  
Ruth Todd  
Helen Tomasik  
Marian Toth  
Dr. Ninh & Sarah Tran  
Vincenza Travale  
Turkstra Lumber's 65th  
anniversary supporters  
Turkstra Lumber Company Ltd.  
Laura Turkstra  
Peter & Karen Turkstra  
Laura Tutte  
Kenneth J. Tyler  
United Nations Association in  
Canada Hamilton Branch  
Joan VanDuzer  
Baldeep Virk

Alan & Janet Walker  
Paul & Marilyn Walsh  
Yulena Wan & Scott Newport  
Dr. Gary & Joy Warner  
Kathy Watts  
Ine Wauben  
Dr. Sarah Wayland  
Alexandra Weaver  
Beth Webel  
Kate Whalen  
John & Jean Wheeler  
Jan Whitelaw  
Leon A. & Betsy B. Whitney  
Alan C. R. Whitten  
Rob Wiersma & Tracy Varcoe  
Boris Williams & Sunniva  
Buskermolen  
Gwyn & Gail Williams  
Colin Wilson  
The Winnipeg Foundation  
Donald Woodside  
Art Worth  
Al Wright & Callie Archer  
Yvonne Yeoh  
Marita Zaffiro  
Juliana Zaremba



# HAMILTON SPECTATOR SUMMER CAMP FUND

We thank everyone who contributes to sending children to camp. Contributors of over \$500 are listed below:

Canadian Orpheus Male Choir	Elizabeth Eldridge	Sarah M. Murphy	Sonny Del-Rio & Friends,
Congregation of the Sisters of	Hamilton All Star Jazz Band	Players' Guild of Hamilton Inc.	Hamilton Hometown Christmas
St. Joseph in Canada	Jeffrey Holk	Rotary Club of Hamilton AM	Elizabeth Whetham

# DONATIONS RECEIVED IN MEMORY OF

Larry Ross Barr	Tara Lynn Giuliani	Sarah & Clare Lakin	Margaret Mary Sammon Bluff
Dr. William Bensen	Heather Elizabeth Golba	Carol Leggat	Grace Scott
Irene M. Booker	Sydney V. Hamber	Robert Leggat	Jacqueline Mae Simpson
Joyce Brown	James Anthony Hansen	John Alexander Rumbles	Trevor Somerville
Marvin Louis Caplan	Peter Tomlins Hogarth	Lobban	Dorothy Watson
Sharon Mochner-Caton	Grant Warner Howell	Norman Barry Lowe	Catherine Anne Webster
Grazia Criminisi	Betty Hubert	George Martin Luxton	Robert "Bob" Gordon Wilson
Audrey Ann Cruickshanks	Allan Hunter	Harry John Mills	Dr. William Mortimer Wilson
Timothy Arthur Culver	Douglas Derek Jacques	John Milne	Bryan Daniel Wylie
Maurice East	Rebecca Jamieson	Robert Maxwell Morrow	Gene L. Yachetti
Cassandra Fairhall	Danny Jodouin	Earl Edward Palmer	William Holton Young
Peter James George	B. Eileen Kirkpatrick	Annetta & Poyntz Ricketts	

# DONATIONS RECEIVED IN HONOUR OF

Maritza Anazco	Nick & Carole Emili	Sheree Meredith	James Simpson
Dr. Andrew Arnold	Chris Farias	Paul & Carolyn Milne	Karen Turner
Dr. Clarence Bankay	Dr. Barbara Heller	Dr. Jean Mullens	Reta Faye Walker
Terry Cooke	Dr. Oren Levine	Dr. Harold Reiter	Kathie Ward

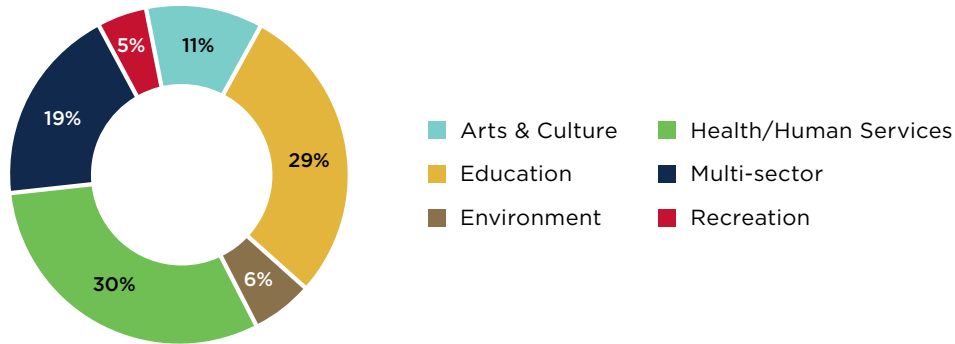
# GIFTS IN KIND

Connor, Clark & Lunn Private Capital	Fengate Real Asset Investments	Jarislowsky Fraser Limited	Orbital
City of Hamilton	The Hamilton Spectator	Annie Kidder	The Pale Blue Dot
directworx	Ted Howard	Kitestring	Bill Young Jr.
ESB Lawyers LLP	ImpactLink Capital	McMaster University Centre for Continuing Education	



# GRANTS AND COMMUNITY LEADERSHIP IN 2017-18

Hamilton Community Foundation offers donors powerful and diverse opportunities to drive positive change. We are unique in that we enable donors to recommend grants to the widest possible range of charitable organizations and initiatives: arts and culture, health and human services, environment, recreation and education. **Find out more at [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca)**



Total annual granting reflects Board-directed granting and the philanthropic interests of those who have established donor-advised and designated funds.

## GRANTS BY FUND TYPE

This list shows the total amounts granted from all funds at Hamilton Community Foundation identified by fund type. A list of grants by recipient organization follows on page 40.

### GRANTS FROM COMMUNITY FUND

Canada 150 grants	195,348	Environment		Unrestricted funds	2,191,302
Creative Arts Fund	225,114	Endowment Fund	37,255	<b>TOTAL</b>	<b>2,649,019</b>

### GRANTS FROM FIELD-OF-INTEREST FUNDS

Alfred & Joan Robertshaw Memorial Fund	45,000	The Angel Fund*	6,400	Arthur & Helena Lemon Fund	5,500
The Alice Jean Ainsworth Memorial Fund	135,900	Anonymous	1,158	Barbara & Bob Harwood Fund	14,000
		Antonina Lombardo Fund	14,050		

Barbara Bethune Fund*	6,290
Barbara Farnan Fund	7,046
Betty & Jack George Family Fund	1,400
Bill & Tina Seale Fund	15,974
Board Leadership Fund	1,500
Charles & Ret Swire Fund	9,834
Delaware Fund	35,000
Dougher Community Fund	149,040
Edward & Gladys Halloran Memorial Fund	55,000
First Place, Hamilton Tomorrow Fund	25,934
Florence E.S. Hutton Fund*	25,357
Foxcroft Family Youth Fund	1,490
Fund for Underprivileged Children	25,609
George & Shirley McBride Foundation Fund	52,730

Giovanni & Grazia Criminisi Literacy Fund*	1,563
Hambro Fund	2,000
Hogarth Family Pioneer Energy Fund	60,000
Ike & Shahnaz Ahmed Foundation Fund	2,126
Jeanne Scott Fund*	47,789
Joan C. Watt Memorial Fund	1,400
Kenneth Boothe Young & Marie Catherine Young Fund	63,600
Lillian M. Shaw Fund	20,000
Marchese Health Care 50th Anniversary Legacy Fund	2,500
Mary Lauder Cassidy Fund	12,320
Nelson Allan Fund	7,888
Note-Able Music Fund	3,147

Ontario Endowment for Children & Youth in Recreation Fund	53,006
Ray Lowes Environmental Fund	22,518
Royal Canadian Humane Association Fund	3,922
Russell I. Elman Fund	55,000
School Sisters of Notre Dame Legacy Fund	20,000
Shirley M. Elford Gift of Today Fund	6,049
Terry & Brenda Yates Fund	46,000
The Van Dusen Fund*	38,275
Vera & Percy Tomlinson Fund	4,500
W. Robert & Marion S. Shivas Conservation Trust Fund	16,828
Women 4 Change Fund	54,952
Youth & Philanthropy Fund	45,000
<b>TOTAL</b>	<b>1,224,595</b>

### GRANTS FROM DONOR-ADVISED FUNDS

Ambery Fund	80,000	Clark Family Foundation Fund	65,170
Anonymous	226,800	David Davis Memorial Fund	1,000
ArcelorMittal Dofasco Children and Youth Fund	81,200	Ed Smee Conserver Society Environmental Fund	2,000
Chedoke Health Foundation Fund	137,055	Edith H. Turner Foundation Fund	482,814

Elham & Joseph Farah Family Foundation Fund*	4,687
Ella Baird & Grace Baird McQueen Memorial Fund/ A.J. McQueen	2,231
Fengate Community Foundation Fund*	51,842



The Gilmour Fund	20,000
Glen & Debra Swire Fund	2,906
Great Lakes Trust Fund*	687
Hamilton Prosperity Fund	4,600
Hamilton Spectator Summer Camp Fund	65,475
Heather & Ross Hamlin Fund*	497,000
Heels Family Vocal Award Fund*	13,117
Hogarth Family Foundation Fund	265,000
Hugh C. Arrell Memorial Fund	2,000
Hundred Waters Foundation Fund*	167
Hutton Family Fund*	53,667
John & Esther Marshall Memorial Fund	12,000
John & Mary Reesor Fund	7,800

GRANTS FROM SCHOLARSHIP AND BURSARY FUNDS

Albert & Betty Walters Fund	3,356
Amanda Marie Cowan Memorial Scholarship Fund	1,346
Bernie Morelli Memorial Bursary Fund	1,299
Charlie and Mabel Duncan Memorial Bursary Fund	1,299

Kathleen C. Nolan Education Fund	1,959
Kirkpatrick Fund	6,000
Lawyers’ Legacy for Children	5,895
Lillian & Marvin Goldblatt Family Fund	15,000
Lois Evans Natural Heritage Fund	7,500
Losani Family Foundation Fund	145,500
The Malloch Foundation Fund	42,449
Maple Leaf Centre for Action on Food Security Fund	148,875
Mark & Barbara Nimigan Fund	5,386
Marlies & Alan Clark Fund	77,000
The Martin Foundation Fund	62,600
Mayberry Family Fund*	10,774
McCallum, McBride Fund	42,850
Meredith Family Fund	1,800

Mildred Dixon Holmes - Youth Orchestra Fund	4,014
Milne McGrath Fund	28,000
Payne Fund	500
Ray Brillinger & Cy Hack Fund	1,411
The Ron & Gina Fraser Endowment Fund	3,841
Sons of Italy Hamilton Trieste Lodge Legacy Fund	1,000
Tara Lynn Giuliani Foundation	15,250
Thorne Family Fund	3,000
Tran Family Fund*	3,174
W.L. Carpenter Memorial Fund*	108,966
Williams Family Fund*	3,639
The Young Fund*	1,801,412
TOTAL	4,627,013

General Bursary Fund/ Genevieve A. Chaney & Cordelia C. Ensign	40,200
Howard Fairclough Organ Scholarship Fund	2,600
James Darby Bursary Fund	17,300
Jeff Dickins Memorial Fund	1,000

Jervis B. Webb Company of Canada Scholarship Fund	7,500
John E. VanDuzer Scholarship Fund	2,000

Mildred Dixon Holmes - Artist of the Year Fund	2,000
Music Bursary Fund	1,982
Ross F. Webb Bursary Fund	3,359

Rundle Foreign Study Bursary	2,500
Russell & Elizabeth Lindley Fund	8,181
William Allison Haynes Fund	4,595
TOTAL	228,842

GRANTS FROM DESIGNATED FUNDS

Anonymous	217,793
Art and Barb Worth Fund	4,530
Douglas J. Clark Fund*	6,707
Eva Rothwell Resource Centre Fund	4,451
Frank Charles Miller Fund*	55,714

James P. & Mary S. Phin Charitable Fund	10,939
Joe, Filomena and George Seliga Holdings Fund	74,887
Phenix Fund for Animal Welfare	5,910
PHOG Endowment Fund	15,840

Samaritans’ Tithe Fund	13,359
Stoney Creek Health Fund	38,092
United Way Fund/ Kenneth R. Walsh	17,712
Walter & Mildred Danby Fund*	24,635
TOTAL	490,569

TOTAL GRANTS

Total grants approved	9,220,039
Adjustment for deferred grants	(1,543,575)
TOTAL GRANTS PAID	7,676,464

COMMUNITY LEADERSHIP PROJECTS

Leadership project costs include research, community consultation, meeting costs, educational materials and communication.

ABACUS: Advancing post-secondary access	166,575
Hamilton Anchor Institution Leadership Table	89,506
Neighbourhood – Community Development Team	66,751

Neighbourhood Leadership Institute	196,851
Other leadership projects	17,849
TOTAL COMMUNITY LEADERSHIP PROJECTS	537,531
TOTAL GRANTS AND COMMUNITY LEADERSHIP	8,213,995

GRANTS BY RECIPIENT ORGANIZATION

This list shows the details of all grants to all organizations in 2017-18. Grants marked with an asterisk are those made from the Board-directed Community Fund or field-of-interest funds. All other grants are from donor-advised or designated funds and reflect the philanthropic interests of those who established the funds.

- In addition to the grants below, the Foundation provided grants totalling:
- \$65,475 to 21 organizations supporting 631 children to attend one week of camp through the Hamilton Spectator Summer Camp Fund.
  - \$333,588 to 33 academic institutions and organizations for scholarships and bursaries supporting access to post-secondary education.

ACORN Institute Canada		Art Forms/SPRC		ASHOKA Canada	
Civic Connections	9,500	Youth celebrate Canada's 150 through mural making*	5,000	Supporting grant	50,000
Adult Basic Education Association		Art Gallery of Burlington		Autism Society of Ontario, Hamilton Chapter	
Educational planning services	9,000	Barenaked in the Barn - Rainbow of Identities exhibit	10,000	Supporting grant	500
The AIDS Network		Art Gallery of Hamilton		Bach Elgar Choir	
Supporting grant	511	AGH film education program*	5,000	Hamilton Sings*	3,000
ALS Society of Canada		Community Day*	4,000	Supporting grant	3,000
Supporting grant	10,000	Student film competition*	4,000	Banyan Community Services Foundation	
Alzheimer Society of Hamilton and Halton		Support of youth outreach	5,000	Arrell Youth Centre Productions	20,000
Creative Expressions*	7,320	Supporting grant	10,500	D-Bronx	5,000
Music for Memory at Regina Gardens*	14,050	Art Gallery of Ontario		Bay Area Restoration Council	
Amici Camping Charity		Supporting grant	2,000	Waterfest*	985
Camperships	2,500	Art Spin Hamilton/ Hamilton Artists Inc.		Bennetto Middle School/ HWDSB Foundation	
Ancaster Agricultural Society		Supporting grant*	4,000	Supporting grant	2,231
Kite Festival*	4,275	The Arthritis Society		Big Brothers Big Sisters of Hamilton & Burlington	
Ancaster Society for the Performing Arts Corporation		Supporting grant	2,464	In-school mentoring	10,000
Sinfonia Ancaster	3,000	Artscape Foundation		Bill Seven Award Trust	
		Supporting grant	50,000	Scholarships for LGBTQ youth	2,500

\*Denotes Community Fund or field-of-interest fund grant  
Organizations identified in italics are charitable sponsors for the grant  
Some grants are payable over multiple years

Bird Studies Canada		Canadian Institute for Advanced Research		Catholic Family Services of Hamilton	
Supporting grant	1,748	Supporting grant	35,000	St. Martin's Manor*	3,000
Birthright Organization of Hamilton		Canadian Mental Health Association		St. Martin's Manor	1,000
Supporting grant	6,000	Evening Social Recreation Rehabilitation Program	5,000	Catholic Youth Organization	
Brant Food for Thought		Canadian National Institute for the Blind		Supporting grant	1,939
Supporting grant	5,000	Peer support for low vision seniors	2,000	Central Presbyterian Church	
The Bridge from Prison to Community (Hamilton)		Canadian Orpheus Male Choir		Supporting grant	12,176
Supporting grant	5,000	Canada's 150 anniversary concert*	4,000	Centre3 for Print and Media Arts	
Brott Music Festival		The Canadian Red Cross Society		My City, My Home*	9,200
Brott Education Concert Series*	10,000	Supporting grant	671	Phase III of succession plan*	6,000
Supporting grant	2,800	Canadian Warplane Heritage Museum		Proof Positive*	5,000
Bruce Trail Conservancy		Birchall Leadership Award Dinner	20,000	Chamber Music Hamilton	
Fisher's Pond Nature Reserve	200,000	Community Day*	2,200	Supporting grant	13,000
Supporting grant	1,500	Ruhr Express restoration*	5,000	Children's Aid Society of Hamilton	
Burlington Civic Chorale		Youth outreach - educational programs	5,000	Christmas hamper program	10,000
Supporting grant	10,000	Cancer Assistance Program City of Hamilton & District		Crown ward bursaries	5,000
Burlington Community Foundation		Supporting grant	5,000	Supporting grant	6,000
Share to Care campaign	5,000	Canine Vision (Dog Guides Canada)		Children's International Learning Centre	
Supporting grant	23,893	Supporting grant	5,000	Celebrate 150*	2,000
Bursary of Hope for Autism		Carpenter Hospice		Chinese Cultural Association of Hamilton/HARRRP	
Supporting grant	20,000	Supporting grant	5,500	Cultural heritage of Chinese residents*	2,000
Camp Trillium		Cathedral High School/HWCDSB		Christian Horizons Canada	
Supporting grant	11,000	Student emergency needs	2,000	Supporting grant	2,463
Canadian Association for Disabled Skiing		Catholic Children's Aid Society of Hamilton		Christ's Church Cathedral	
Peter Hogarth Fund	10,000	Youth Housing Support Project	14,000	Supporting grant	2,000
Supporting grant	5,000			City Housing Hamilton	
Canadian Cancer Society, Ontario Division				Sherwood Place Christmas dinner	170
Supporting grant	1,765				
Canadian Cystic Fibrosis Foundation					
Supporting grant	2,464				



City Kidz Ministry		Community Resource and Employment Service		Dundas Turtle Watch/ Conserver Society of Hamilton & District, Inc.		Essential Aid and Family Services of Ontario Inc.		Green Venture/ <i>Conserver Society of Hamilton &amp; District, Inc.</i>		The Hamilton/Burlington SPCA	
CityYouth leadership development	5,000	Brantford food bank	5,000	Data management	2,000	Infant formula	6,000	Edible Garden Club	10,000	Cat Coalition*	4,500
Gift of Christmas	2,000	Corporation of the County of Bruce				Supporting grant	5,000	Pedal Powered Smoothies*	5,000	Sit! Stay! Read!	7,900
Supporting grant	20,500		Sauble Beach Children’s Library	2,500	Dundas Valley Orchestra		Evergreen		Habitat for Humanity Hamilton		Supporting grant
City of Hamilton		Culture for Kids in the Arts		Dundas Celebrates Canada 150*	5,000	Supporting grant	75,000	Youth Build	10,000	Hamilton Centre for Civic Inclusion	
Community Day*	8,000	After-school arts program	30,000	The DVO at 40!*	5,000	Famille Marie-Jeunesse Sherbrooke		Halton District School Board		#HamiltonForAll: A public education campaign*	5,000
McQuesten Urban Farm	189,675	I Have a Right: 150 Pen Pal Xchanges*	5,000	Dundas Valley School of Art		Supporting grant	1,000	Aldershot High School		DiverseCity onBoard*	40,000
Nurse Family Partnership	72,000	Resonance choir*	20,000	Aging Artfully outreach program*	10,000	Federation of Canadian Music Festivals		Halton Region Conservation Foundation		Hamilton Children’s Choir	
Queen’s Baton Relay*	5,000	The Dave Andreychuk Foundation		Family ART days*	7,450	Scholarship awards	1,000	Supporting grant	4,207	Financial award program and young voices workshops*	5,000
SoBi Everybody Rides*	24,245	Mount Hamilton Minor Hockey Association	1,939	Holiday gift workshops	2,000	Fieldcote Memorial Park and Museum/ <i>City of Hamilton</i>		Halton Women’s Place		Supporting grant	5,000
Coady International Institute-St. Francis Xavier University		Delta United Church		The Artists’ Connection: Artist as environmentalist	15,000	Exhibition: 150 years through the eyes of the Farmer family*	2,000	Supporting grant	2,911	Hamilton Community Land Trust/ <i>SPRC</i>	
Supporting grant	25,000	Supporting grant	14,000	The Artists’ Connection: Program extension	7,000	Fit Active Beautiful Foundation		Hamilton & District Extend-a-Family		Supporting grant	3,480
The Colin B. Glassco Charitable Foundation for Children		Diabetes Canada		Dundas Youth Chaplaincy		FAB Girls 5K Challenge	7,500	Client holiday party	2,000	Hamilton Community Legal Clinic	
Supporting grant	75,000	Food skills for families/seniors*	5,000	Routes Youth Centre	23,700	New Beginnings*	5,000	Aircraft monument renewal*	2,000	I am Committed*	5,000
Community Care of West Niagara		Doctors Without Borders		Elizabeth Fry Society		GALA Community Planning Team/ <i>SPRC</i>		Hamilton Air Force Association/ <i>Rotary Club of Dundas</i>		Hamilton Roundtable for Poverty Reduction*	50,000
Supporting grant	5,000	Supporting grant	1,000	Seasonal outreach	2,315	Oral History Project*	5,000	Supporting grant	2,000	Supporting grant	4,600
Community Development Halton		Down Syndrome Association of Hamilton		Elliott Heights Baptist Church		Global Peace Center Canada		Hamilton All Star Jazz Band		Hamilton Conservation Authority	
Supporting grant	40,000	Nurture the Ability – arts workshop*	3,000	LARCH after-school program	34,500	Youth4Peace Leadership in Dundas*	10,000	Supporting grant		Community Day*	8,000
Community Food Centres Canada		Dr. Bob Kemp Hospice Foundation		Empowerment Squared		Good Shepherd Centres Hamilton		Hamilton Artists Inc.		Supporting grant	11,259
Supporting grant	50,000	Camp Erin Hamilton	14,000	Family Empowerment	10,000	Back-to-school items for the family shelter*	1,000	External arts and outreach initiatives*	3,000	Hamilton Conservation Foundation	
Community Foundation Grey Bruce		Children’s Hospice	45,000	Playing, Learning and Access for Youth*	6,200	Core Collaborative Learning National Homelessness Film Festival*	17,700	Hamilton Arts Council		Eco Valley Project	1,000
Supporting grant	12,804	Supporting grant	39,842	Supporting grant	750	Learning to Life*	40,000	LivingArts Hamilton*	5,000	Outdoor environmental education*	10,000
Community Foundations of Canada		Duet Club of Hamilton		Youth soccer league*	1,490	Regina’s Place*	21,000	We are 150: Celebrating Hamilton’s artists*	5,000	Outdoor environmental education in Dundas Valley Conservation Area	2,500
Attendance support for national conference*	2,500	Vocal scholarship	2,500	Engineers Without Borders (Canada)		Storytelling: A workshop series for women*	4,300	Hamilton Association for Residential & Recreational Redevelopment Programs (HARRRP)		Outdoor environmental education opportunities for disadvantaged youth	10,000
Supporting grant	43,384	Dundas Art and Craft Association		Supporting grant	75,000	Supporting grant	70,709	Canada 150 - Paradise Project*	5,000	Supporting grant	4,207
Community Living Hamilton		Dundas Historical Society Museum		Environment Hamilton/ <i>Conserver Society of Hamilton &amp; District, Inc.</i>				St. Peter’s HARRRP	10,000		
Drum Corps uniforms*	1,450	Double Exposure - The Valley Revisited*	4,700	Friendly Streets Hamilton*	13,010			Winterfest Shindig - Sherman Neighbourhood*	330		
Supporting grant	335	Expansion project	2,000	The Equality Effect							
				Supporting grant	75,000						

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A REFLECTION OF HAMILTON

A REFLECTION OF HAMILTON

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<b>Hamilton Council on Aging</b>		<b>Hamilton Health Sciences (HHS) Foundation</b>		<b>Hamilton Philharmonic Orchestra (2000) Inc.</b>		<b>Hamilton-Wentworth Catholic District School Board (HWCDSB)</b>		<b>Immigrant Access Fund</b>		<b>Juravinski Hospital &amp; Cancer Centre Foundation/ HHS Foundation</b>	
Senior Women4Change Learning Series*	8,000	Breast cancer program	1,000	Adopt-a-school and discovery workshop programs	2,000	Equal Opportunities Fund	969	Supporting grant	50,000		
Supporting grant*	100	Hybrid Operating Room	16,474	Concert sponsorship	10,000	Small grants program for teachers*	13,750	<b>Indwell Community Homes</b>	500	Supporting grant	2,000
<b>Hamilton District Society for Disabled Children</b>		Supporting grant	12,000	Dundas senior and student programming*	9,600	Supporting grant	1,959	<b>Interval House of Hamilton</b>		<b>Juvenile Diabetes Research Foundation</b>	
Supporting grant	699	Tomorrow Stems from You campaign	150,000	Endowment fund with Ontario Arts Council	10,000	<b>Hamilton-Wentworth District School Board (HWDSB) Foundation</b>		Hero's Journey	7,000	Supporting grant	750
<b>Hamilton East Kiwanis Boys' and Girls' Club</b>		<b>Hamilton Literary Festival Association</b>		Outreach program	5,000	Forest of Reading*	25,000	Jared's Place*	5,500	<b>Keith Neighbourhood Community Hub/<i>The John Howard Society</i></b>	
GirlsZONE*	29,280	gritLIT capacity building*	4,520	Programs for families and seniors	10,000	Rainbow Prom*	2,000	Jared's Place	5,000	The Strawberry Thunder Festival*	4,000
Ontario Early Years Centre	2,000	gritLIT Hamilton's Readers and Writers Festival*	4,000	Supporting grant	38,920	Save the Bees	9,400	Supporting grant	8,386	<b>Kids Now</b>	
We ROCK*	500	<b>Hamilton Music Collective</b>		<b>Hamilton Philharmonic Youth Orchestra</b>		Small grants program for teachers*	25,619	Upkeep and support of Emily's Garden	1,000	Self-Esteem and Leadership Mentorship	5,000
We ROCK	5,000	An Instrument for Every Child's Jambassador band program*	10,000	Supporting grant	6,014	<b>Healing Arts and Recovery with Peer Support/<i>City Housing Hamilton</i></b>		<b>Jazz.FM91 Inc.</b>		<b>Kiwanis Music Festival Association of Greater Toronto</b>	
<b>Hamilton East Kiwanis Non-Profit Homes Inc.</b>		An Instrument for Every Child	34,939	<b>Hamilton Public Library</b>		Arts presentation*	6,400	Supporting grant	570	Vocal scholarship	500
Hoppy Easter - Gala Neighbourhood*	1,500	LIVE Lab Grade 1 trips	4,000	Canada 150 stories*	5,000	<b>Heart and Stroke Foundation of Ontario</b>		<b>The John Howard Society</b>		<b>Lake Ontario Waterkeeper</b>	
<b>Hamilton East Seventh-Day Adventist Church</b>		<b>Hamilton Naturalists' Club</b>		<b>Hamilton Regional Indian Centre</b>		Supporting grant	2,711	Easter Celebration - Riverdale Neighbourhood*	1,500	Supporting grant	653
Hamilton's Cultural Day*	4,000	Celebrating Hamilton's Pollinator Corridor Through Art*	3,500	Endaayaang - Knowledge Keeper*	30,000	<b>Hearts Together For Haiti</b>		Healthy Communities Flamborough	3,000	<b>L'Arche Hamilton</b>	
<b>Hamilton Festival Theatre Company</b>		deLight Festival - Crown Point Neighbourhood*	1,500	<b>Hamilton Right to Life</b>		Supporting grant	5,000	Pause, Shuffle, Play - Davis Creek Neighbourhood*	675	Creative Hands Day Studio	2,500
Artistic Leadership and Entrepreneurial Training	5,000	Development of Grimsby wetlands	7,500	Supporting grant	5,000	<b>Historic Waterdown Arts &amp; Events/<i>Kin Canada Foundation</i></b>		Spring Time Egg Hunt - Davis Creek Neighbourhood*	625	<b>LEAP Pecaut Centre for Social Impact</b>	
Frost Bites: A site-specific performance festival*	3,000	More Trees Please*	5,000	<b>Hamilton Sustainable Victory Gardens Inc.</b>		ArtsFest Waterdown*	5,000	Yard Program*	35,000	Supporting grant	125,000
<b>Hamilton Food Share</b>		Pollinator Paradise	3,000	Supporting grant	2,000	<b>Holly Street Advocacy Centre for the Elderly</b>		<b>Joseph Brant Hospital Foundation</b>		<b>The Learning Partnership</b>	
Bulk buy food purchase*	15,000	Supporting grant	16,466	<b>Hamilton Theatre Inc.</b>		Supporting grant	1,158	Supporting grant	750	Supporting grant	25,000
Food for low-income seniors	2,500	<b>Hamilton Out of the Cold Program Coalition Inc.</b>		<b>Hamilton Youth Poets/<i>Lynwood Charlton Centre</i></b>		<b>Hope for Wildlife Society</b>		<b>Jump In Foundation</b>		<b>Liberty for Youth</b>	
Seniors program*	5,000	Supporting grant	2,449	Access to the arts for children and youth*	4,000	Supporting grant	500	Physical Activation Program*	10,000	Bright Choices	10,000
Support for seniors and supporting grant	5,000			All-Star Engagement*	5,000	<b>The Hospital for Sick Children</b>		Physical Activation Program	10,000	<b>Living Rock Ministries</b>	
Supporting grant	63,000					<b>Imagine in the Park Children's Arts Festival/<i>Rotary Club of Hamilton</i></b>		Supporting grant	500	25 Days of Christmas	3,500
						Supporting grant*	5,000	<b>Jump Math</b>		Housing support*	200
								Cause Marketing Strategy	25,000	Rock Resources	25,000
								Supporting grant	50,000	Supporting grant	8,987
										Wellness Works	5,895



<b>London Community Foundation</b>		<b>McQuesten Community Planning Team/<i>SPRC</i></b>		<b>Neighbour to Neighbour Centre (Hamilton)</b>		<b>Ontario Registered Music Teachers' Association - Hamilton/Halton</b>		<b>Prince of Wales Public School/<i>HWDSB Foundation</i></b>		<b>Robert Land Community Association</b>	
Daniel Nestor Fund	1,000	Multicultural Canada Day*	4,000	Food, Justice and Arts festival*	5,000	Vocal scholarships	900	Butterfly project*	200	Young moms' art program – Keith neighbourhood*	4,000
<b>Loran Scholars Foundation</b>		<b>Melrose United Church</b>		Hamilton Community Food Centre: Food skills programming for all ages	10,000	<b>Ontario Registered Music Teachers' Association</b>		<b>Queen Mary School/<i>HWDSB Foundation</i></b>		Food and clothing pantry	5,000
Supporting grant	80,000	Supporting grant	6,340	Jack Parent reading program*	20,000	Vocal scholarship	700	Queen Mary performing arts program*	5,000	Hamilton Imagination Library*	4,500
<b>Lynwood Charlton Centre</b>		<b>Métis Women's Circle</b>		Jack Parent reading program	15,000	<b>Opening Hearts</b>		<b>Re-create Outreach Art Studio/<i>Shalem Mental Health Network</i></b>		Supporting grant	4,451
Butterfly and Bee Garden	2,000	Reconciliation through music at Hess Street School*	20,000	Kids Can Succeed	1,000	Opening Hearts Sibshops and Sibteens*	5,500	Art for street-involved youth*	10,000	<b>Roman Catholic Episcopal Corporation St. Ann's Parish</b>	
Under the Willows*	10,000	<b>Michael Pinball Clemons Foundation</b>		<b>Net Ministries of Canada</b>		<b>Options for Independent Living and Development</b>		Erased Lines: Poetry exploration workshops for at-risk youth*	2,880	Supporting grant	8,000
Under the Willows	7,500	Supporting grant	5,000	Supporting grant	1,000	George Street Residents' Canada 150 Celebration*	5,000	Opening the Circle*	6,000	<b>Ronald McDonald House Hamilton</b>	
<b>MacNab Street Presbyterian Church</b>		<b>Mission Services of Hamilton</b>		<b>New Hope Community Bikes</b>		<b>The Owl Foundation</b>		<b>Red Tree Artists Collective/<i>Workers Arts &amp; Heritage Centre</i></b>		Family in-hospital support program	2,000
Supporting grant	11,020	Photographic exhibit and drug addiction awareness initiative*	15,000	Supporting grant	500	Owl food	2,000	Multi-generational arts in the classroom at Prince of Wales Elementary*	5,000	Ronald McDonald family room program	2,000
<b>March of Dimes Canada Non-Profit Housing Corporation</b>		Supporting grant	7,183	<b>New Vision United Church</b>		Pine shavings for mice	1,300	<b>Rideau Hall Foundation - Fondation Rideau Hall</b>		<b>Rotary Burlington Music Festival</b>	
Jason's House kitchen renovations	5,000	Youth meal program	18,000	Supporting grant	9,858	<b>PATH Employment Services</b>		Post-secondary Access and Success Network*	50,000	Scholarship awards	2,700
<b>MaRS Discovery District</b>		<b>Mohawk College</b>		<b>No. 9 Contemporary Art &amp; the Environment</b>		Peer support group pilot*	500	<b>Riverdale Community Centre/<i>SPRC</i></b>		<b>Rotary Club of Hamilton A.M.</b>	
Centre for Impact Investing	75,000	Bursaries	10,002	Supporting grant	50,000	<b>Peel Music Festival</b>		Riverdale Eid and Canada 150 Celebration*	5,000	Imagine in the Park*	6,000
Solutions Lab	150,000	Drafting fundamentals and standards	20,000	<b>North Hamilton Community Health Centre</b>		Vocal scholarship	400	<b>The Rob Freeman Foundation</b>		<b>Royal Botanical Gardens</b>	
SVX	25,000	<b>Musicata (John Laing Singers)</b>		Pathways to Education: Fitness and recreation program*	8,000	<b>People for Education</b>		Supporting grant	2,000	Community Day*	5,000
<b>Mathstronauts</b>		Supporting grant	2,000	Pathways to Education: Neighbourhood expansion	30,000	Measuring What Matters*	150,000	<b>Players' Guild of Hamilton Inc.</b>		Supporting grant	19,033
STEM Hacks	2,000	<b>Muskoka Conservancy</b>		Pathways to Education: PATH program*	60,000	Free indoor soccer league*	4,698	It's Morning Now*	6,980	<b>Royal Canadian Humane Association</b>	
<b>Maytree Foundation</b>		Supporting grant	1,000	Pathways to Education: Photostory project*	3,000	<b>Philpott Memorial Church</b>		Supporting grant	5,000	Supporting grant	3,922
Commonwealth Program	50,000	<b>National Association of Teachers of Singing, Ontario Chapter</b>		<b>Notre-Dame de Perpetual-Secours</b>		Supporting grant	9,854	<b>Portage Program for Drug Dependencies</b>		<b>Royal Conservatory of Music</b>	
<b>McGill University</b>		Scholarship awards	2,500	Supporting grant	26,000	<b>Peoples Community Sports/<i>The Peoples Church</i></b>		Hamilton's aftercare support program	4,000	Vocal scholarships	1,000
Supporting grant	2,000	<b>National Youth Orchestra</b>		<b>NovaCare Retirement Communities Association/<i>Knights of Columbus Ontario Charity Foundation</i></b>		Supporting grant	5,000			<b>Rygiel Support for Community Living</b>	
<b>McMaster University</b>		Supporting grant	1,000			<b>Players' Guild of Hamilton Inc.</b>				Supporting grant	2,463
Change Camp Hamilton 2017*	1,500	<b>Native Women's Centre</b>				Supporting grant	5,000			<b>Salal Foundation</b>	
MCYU in the City*	32,500	Resilience in Indigenous Communities*	4,131			<b>Portage Program for Drug Dependencies</b>				Canopy Initiative	50,000
Museum of Art	2,000	Supporting grant	400								
President's Fund	1,000	The Circle of Gifting	2,325								
Ray Family Autism Research Fund	20,000	Trauma Sensitive Yoga	2,500								
Scholarship award	1,000										

The Salvation Army Hamilton

Celebrating Canada’s 150*	2,500
Ellen Osler Arts Program*	2,000
Ellen Osler Home	1,000
Ellen Osler Home bathroom renovation project*	10,000
Food bank*	15,000
Grace Haven Comfort and Care	1,400
New Choices Centre*	500
Supporting grant	10,671
The Paparella Innovative Arts Collaborative Mosaic Art Project*	5,000
Trusteeship program*	24,000
Trusteeship program	5,000
<b>Scientists in School</b>	
Supporting STEM education in Hamilton’s low-income communities	14,450
<b>Scleroderma Society of Canada</b>	
Supporting grant	5,000
<b>Scouts Canada - Central Ontario Service Centre</b>	
Supporting grant	250
<b>Shakespeareience Performing Arts</b>	
School programs*	5,000
School programs	3,000
<b>Shalem Mental Health Network</b>	
Creating Community One Senior at a Time*	9,572
<b>Shriners Hospitals for Children</b>	
Supporting grant	1,232
<b>Sir John A. Macdonald Secondary School/HWDSB Foundation</b>	
Student emergency needs	2,000

Skills for Change

Bridging the Gap: Reducing isolation through training and support*	15,000
<b>Social Planning &amp; Research Council of Hamilton (SPRC)</b>	
Community development – small grants program*	32,814
Community development support*	157,500
<b>The Society for Animal Aid (Burlington Humane Society)</b>	
Supporting grant	2,000
<b>Society of our Lady of the Most Holy Trinity (Canada)</b>	
Supporting grant	32,000
<b>St. Agnes School/HWCDSB</b>	
Introduction to the arts*	5,000
<b>St. Jerome’s University</b>	
Supporting grant	4,000
<b>St. John Ambulance</b>	
Support for therapy dogs	300
<b>St. Joseph’s Healthcare Foundation</b>	
Electrocardiogram machines	25,000
Mental health services at West 5 <sup>th</sup> site	10,000
Supporting grant	21,000
Youth Wellness Centre - Empowerment Fund	5,000
<b>St. Joseph’s Home Care</b>	
Supporting grant	25,934
<b>St. Joseph’s Villa</b>	
Hospice support	5,000

St. Joseph’s Villa Foundation

Construction renovations to wing	5,000
Enhancing care*	15,000
Supporting grant	30,000
<b>St. Mark’s United Church</b>	
Accessible audiovisual project*	10,000
<b>St. Matthew’s House</b>	
Hearing the Voice of Our Community*	3,000
Senior home delivery supports	10,000
Christmas program	3,000
Supporting grant	15,774
<b>St. Patrick’s Parish</b>	
Supporting grant	40,969
<b>St. Peter’s Care Centres</b>	
Raise the Flag*	500
<b>St. Raphael’s Parish Church</b>	
Accessibility project	5,000
Supporting grant	1,000
<b>St. Vincent de Paul Society</b>	
Lumber for building renovation project	6,000
<b>Start2Finish</b>	
Running & Reading Club	21,000
<b>Stewart Memorial Church</b>	
Celebrating Black presence and contributions to Canada (Hamilton)*	5,000
<b>The Stop Community Food Centre</b>	
Supporting grant	75,000
<b>Student Open Circles</b>	
Community Volunteer Circles*	3,000
Community Volunteer Circles	10,500

SwimAbility Hamilton/  
Special Olympics Ontario Inc.

Hamilton lessons*	1,500
<b>Tamarack Institute for Community Engagement</b>	
Be a Light Fund	50,000
<b>Telling Tales</b>	
10th anniversary community outreach	10,000
Canada 150 events*	3,500
Literacy campaign	5,000
Programming for children and youth in low-income neighbourhoods*	5,000
Reading campaign*	3,000
<b>Tetra Society of North America</b>	
Tools for Tykes – Hamilton Chapter	3,500
<b>Theatre Ancaster</b>	
Supporting grant	5,000
<b>Theatre Aquarius</b>	
Ovation Outreach Enrollment Program	5,000
Supporting grant	9,000
<b>Threshold School of Building</b>	
Computer lab	5,000
Job developer	20,000
Supporting grant	15,241
<b>THRIVE</b>	
OASIS program	35,000
Sexual Abuse Assessment and Treatment Program	4,000
Supporting grant	30,000

Tides Canada Foundation

Strategic Philanthropy and Leadership*	7,500
<b>Tottering Biped Theatre Inc.</b>	
Shakespeare at the Royal Botanical Gardens*	5,000
Shakespeare at the Royal Botanical Gardens	3,000
<b>Town of Collingwood</b>	
Boardwalk trail system	56,000
Heather Pathway expansion	26,000
<b>TVOntario</b>	
Supporting grant	570
<b>The Tyndale Foundation</b>	
Supporting grant	2,463
<b>United Nations Association in Canada Hamilton Branch</b>	
Peace Book	500
Waging Peace in Hamilton*	4,000
<b>United Way Halton &amp; Hamilton</b>	
Supporting grant	26,777
<b>University of Guelph</b>	
Bursaries	4,000
<b>University of St. Michael’s College</b>	
Supporting grant	5,000
<b>University of Toronto</b>	
President’s Club	1,000
<b>University of Western Ontario</b>	
The Concussion Project	1,000
<b>Urquhart Butterfly Garden/ Conserver Society of Hamilton &amp; District, Inc.</b>	
Summer educational program*	2,740

Vibe Arts

150 Reasons why we love Canada*	5,000
<b>Victorian Order of Nurses - Hamilton Branch</b>	
Palliative education and intravenous training certification for nurses*	5,000
Tele-Touch program	500
<b>Village Theatre (Waterdown) Inc.</b>	
Supporting grant	5,000
<b>The Waterdown East Flamborough Heritage Society and Archives</b>	
Flamborough Heritage Early Settlements Book and Olde Tyme Picnic*	4,000
<b>We Charity (Free the Children)</b>	
Supporting grant	25,000
<b>Welcome Inn Community Centre of Hamilton</b>	
Child and youth programs*	23,800
Community Christmas	1,950
Inspiring Education	2,000
Learning and Fun: Financial literacy program	15,602
New Horizons Thrift Store*	2,500
Supporting grant	10,000
Welcoming 150 years*	2,375



Wellwood Resource Centre of Hamilton

Exploring the cancer journey through art*	5,000
Multimedia workshops	4,000
Men’s Night In	2,000
Sessions for children living with serious illness in the family*	5,500
Sessions for children living with serious illness in the family	6,064
Supporting grant	10,049

Wesley Urban Ministries

Supporting grant	9,113
The Great Hamilton Scavenger Hunt*	5,000
WAN2B*	50,000

Westdale Cinema Group 3

Equipment for live programming*	25,000
Supporting grant	5,000

Wever CORE/Rotary Club of Hamilton Sunshine Fund

McMaster trip*	7,000
Mom’s Healthy Cooking on a Budget	7,000
Supporting grant	7,987

Workers Arts & Heritage Centre

Community Day*	300
School visits	1,500
Youth programs*	5,000

YMCA of Hamilton/Burlington/Brantford

Camp Wanakita bursary	1,000
Peace Medal	4,000
Senior Beyond the Bell	20,000

Youth and Philanthropy Initiative Canada

Hamilton schools*	37,500
YPI at Dundas Valley Secondary School*	2,500

YWCA Hamilton

A Phoenix Place Christmas	1,560
Art in Transition*	3,931
Bones Plus*	8,000
Family Access Program	5,000
Phoenix Place	1,000
STEM Girls’ Club	1,000
Syrian Girls’ Leadership and Integration Training Camp*	5,608
Transitional Housing and Shelter Program	3,000

ALIGNING OUR ASSETS WITH MISSION

One of Hamilton Community Foundation’s strategic goals is to align all of our financial assets with our mission. This is accomplished primarily through impact investing and increasing the alignment of our public market portfolio. We aim to devote 20 percent of our assets to impact investments by 2020:

- Locally, through loans to charities, not-for-profits and social enterprises to support or accelerate their mission delivery.

- Nationally and globally, through a broader range of investment opportunities that diversify our impact portfolio and encourage the growth of impact investing for community good.

All HCF donors drive positive change in two ways: through granting and now, through impact investing, which delivers financial returns coupled with positive social and/or environmental outcomes.

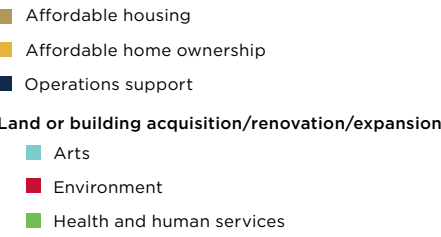
LOCAL INVESTMENTS

Since its community loan fund was established in 2012, HCF has approved \$7.1 million in loans to local projects. Last year, these included:

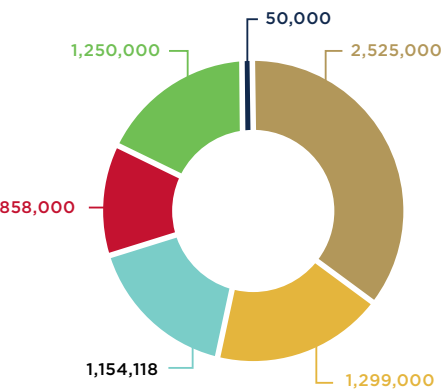
- Corktown Co-operative Homes to purchase property for building new units that will provide affordable housing of sizes better matched to its community’s existing needs, including both larger families and empty nesters.
- New Hope Community Bikes to purchase a storefront retail and workshop location that will increase visibility and space, and which will enable greater community outreach around the benefits of biking, including its affordability.

In addition, HCF will be converting its current investment, which assists Trillium Housing with its affordable home ownership projects, into a mortgage fund. This fund will provide shared appreciation mortgages to increase housing affordability for qualifying families.

The purposes of our loans to date are as follows:



LOCAL IMPACT LOANS FUNDED SINCE INCEPTION - \$7.1M

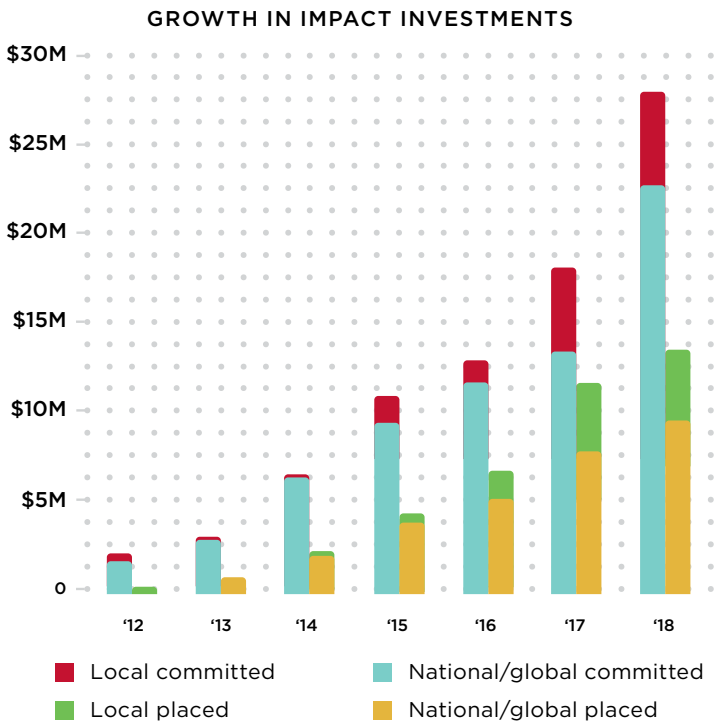


NATIONAL/GLOBAL INVESTMENTS

Investments last year include:

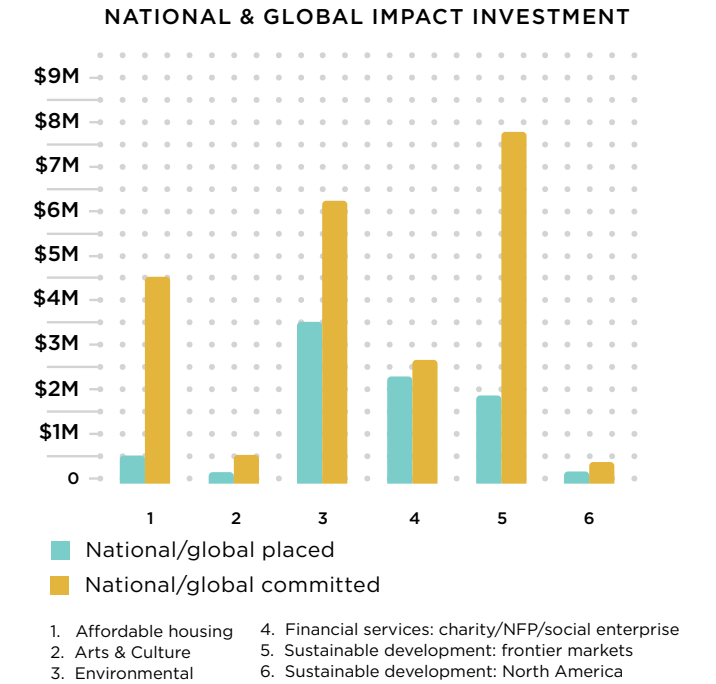
- Habitat for Humanity Greater Toronto Area, a loan to help build 24 three- to five-bedroom affordable home ownership townhouse units in Peel and Scarborough.
- Evergreen, a loan syndicated with five other foundations to redevelop the historic Kiln Building at Toronto’s Evergreen Brick Works — one of the first Canadian projects to set and strive for a carbon neutral target.
- Canopy Sustainable Land Use Fund, a Canadian fund investing in coffee and cocoa co-ops as one way to create more sustainable farming methods and reduce deforestation, land degradation and climate change.
- CoPower, which offers “green bonds,” a product that provides a diversified portfolio of loans to clean energy and energy efficiency projects.
- Sarona, a private equity investment that is a bridge between private capital and the companies that build local communities in developing countries.

The following chart summarizes our impact investment growth since 2012. The nature of some of the national/global investments results in commitments that are placed over several years. As of March 31, 2018, we have committed \$28 million, up from \$18 million last year and significantly progressing toward our 20 percent by 2020 goal.



RESPONSIBLE INVESTING – THE OTHER 80 PERCENT

Recognizing that all investments have environmental, social and governance (ESG) implications, HCF continues to refine its strategies to ensure alignment of our public holdings with our mission. HCF’s investment managers are signatories to the United Nations Principles for Responsible Investing and, along with their portfolio holdings, are evaluated annually by independent expert firms related to ESG factors.





# FINANCIAL HIGHLIGHTS

Donations to the Foundation are invested for the long term in the public and alternative investment markets. Investment income is then allocated annually to support granting, community leadership and ongoing operations. The summary and charts presented here provide both a financial snapshot and a history of recent activity that support the remarkable donor, grants and community leadership stories included in this annual report, along with all the work that HCF is privileged to steward on behalf of our donors.

(\$000's)	2018	2017	2016
Donations received	6,503	3,141	11,631
Grants and community leadership	8,214	7,214	7,869
Loans outstanding to local charities and not-for-profits	6,403	5,062	1,558
Operating expenses	2,478	2,316	2,256
As a % of average assets	1.3%	1.2%	1.2%
Total assets	194,466	192,795	182,388
Investments at:			
Market	178,617	178,911	172,875
Cost	<u>15,159</u>	<u>12,753</u>	<u>8,358</u>
	<u>193,776</u>	<u>191,664</u>	<u>181,233</u>
Investment returns:			
One year	4.1%	11.2%	-0.1%
Five years	9.5%	11.2%	9.2%
Ten years	7.0%	6.3%	6.0%
Total HCF funds balance	182,355	181,212	170,849
Funds held on behalf of other parties	11,089	10,293	10,206

# OVERVIEW

Outstanding support from HCF’s donors continued in 2017-18 with donations of \$6.5 million.

After seven quarters of positive investment returns, volatility returned to the market for the quarter ended March 31, 2018 with slightly negative investment returns resulting in an annual return of 4.1 percent. Volatility was driven by concerns around potential inflation, as well as uncertainty related to international trade negotiations and is expected to continue throughout the coming year. As long-term investors, HCF’s investment and spending policies recognize that volatility is a reality of public market investing. Our spending policy determines the amount available to grant in any given year, and is currently set at four percent annually. The spending policy allows for consistent levels of granting, with excess income in higher-return years used to support income shortfalls in lower years. Our reserves enable us to continue to grant and maintain operating capacity when the market is weak, and they remain at their policy maximum.

HCF is continuing its work to re-allocate more assets from our public market portfolios into investments that a) align with our mission, b) provide the required investment returns, and c) provide for investments not correlated with the public markets. We are particularly pleased to report outstanding loans of over \$6.4 million through our local community investment fund. These loans support areas like affordable housing, affordable home ownership, protected land acquisition and operational support for charities and not-for-profits. In addition, another \$6.4 million has been placed in

private equity and other investments with strong return profiles and missions of creating positive social or environmental change. We are continuing to see significant growth in the impact investing field both in Canada and internationally.

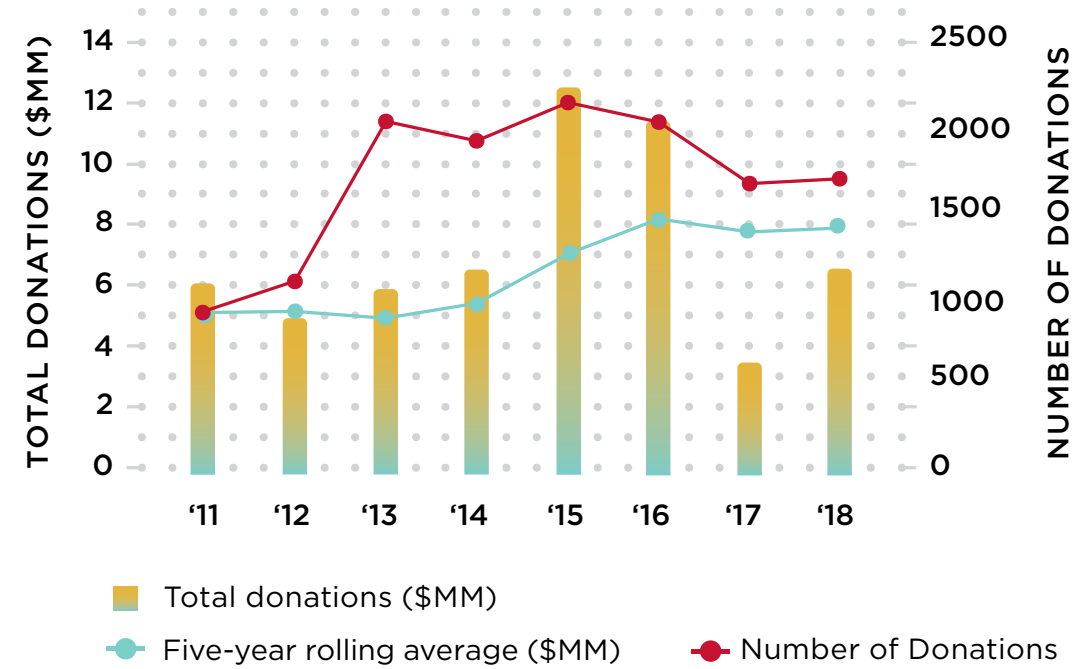
In keeping with our commitment to financial accountability and transparency, full audited financial statements are available at [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca) or by mail. If you have any questions regarding our financial highlights, please contact Annette Aquin, at [a.aquin@hamiltoncommunityfoundation.ca](mailto:a.aquin@hamiltoncommunityfoundation.ca) or by phone at **905-523-5600 ext. 243**. You may also access the HCF T3010 tax return information via <http://www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html>.

# DONATIONS

Donations to the Foundation are from individuals, corporations and other charities. Donors may contribute to named endowment or flowthrough funds, to the Board-directed Community Fund, or to HCF’s community leadership projects.

Total annual donations have ranged between \$3.2 and \$12.4 million over the past eight years. Annual donations are significantly influenced by the timing of the realization of donations in wills. Donations for 2018 were \$6.5 million. The five-year rolling average of donations ranges from \$4.9 million to \$8.2 million and has grown significantly in the last several years.

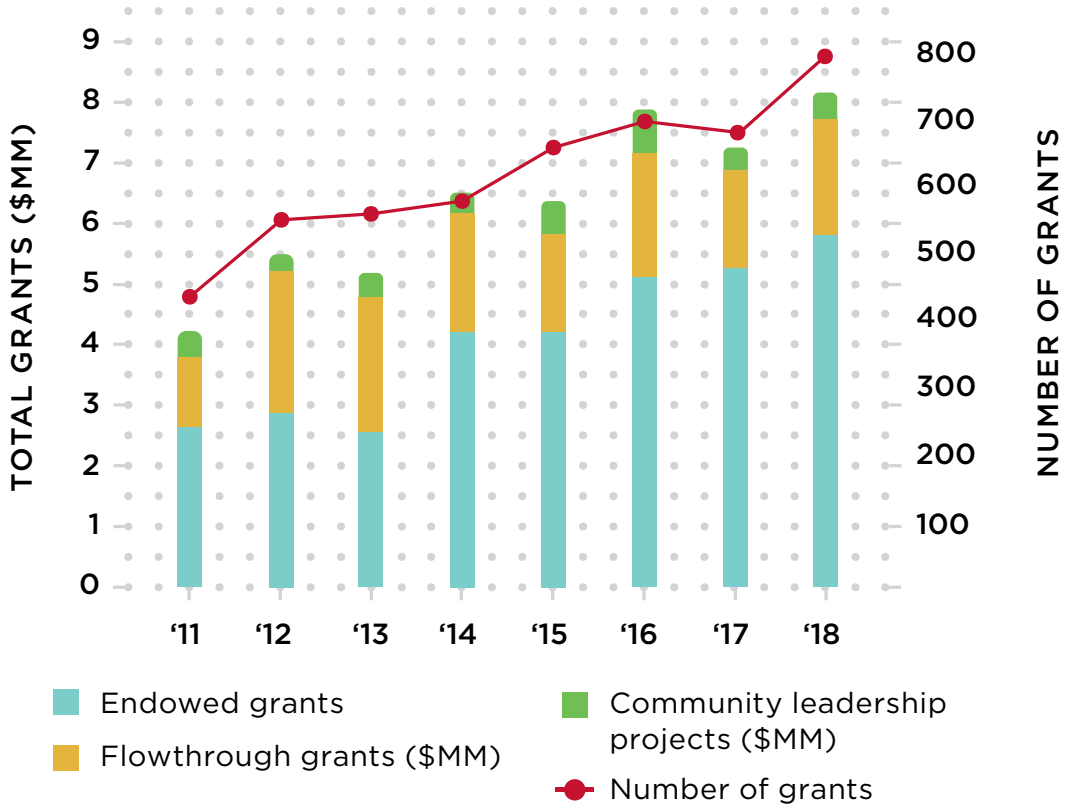
The number of donations received reached a high of 2,146 in 2015 and continues to be significantly higher since 2013 as a result of the number of “in memoriam” donations received and the number and nature of donor-sponsored events to raise money for their funds. This number fluctuates significantly based on the number and size of events in any fiscal year.



# GRANTS AND COMMUNITY LEADERSHIP

Grants are made annually from both endowed and flowthrough funds. Because flowthrough fund balances are distributed in a shorter time period, granting from these funds can materially influence the total annual amount granted.

Grants and community leadership project spending over the past eight years has ranged from \$4.0 million to a historic high of \$8.2 million this year. Granting from endowment funds was reduced in 2013 as a result of the decline in investment returns in 2012 which a) lowered the asset base used for the granting calculation (currently 4.0 percent of the fund balances), and b) resulted in less income available to grant. Flowthrough granting and expenditures on community leadership projects has ranged from 28 percent to 56 percent of total granting in any given year and is dependent on the timing and nature of flowthrough and project activity. At 755, the number of grants for 2018 is 28 percent higher than the last eight-year average, and was influenced by 48 grants for Canada 150 community projects, as well as by granting from new funds.





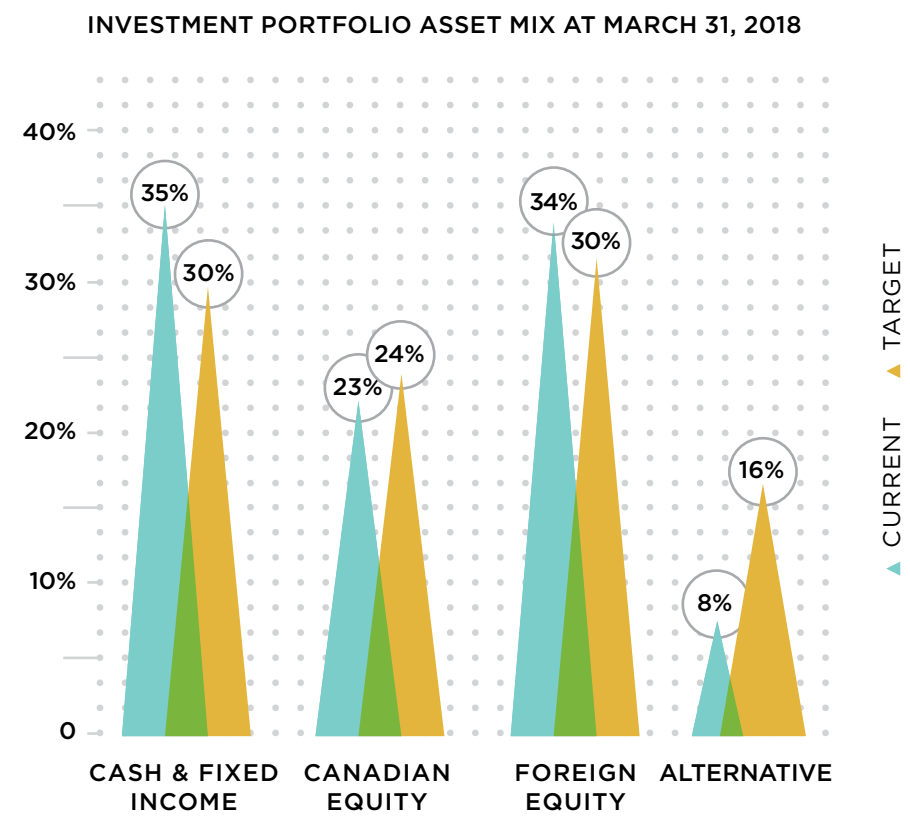
# INVESTMENTS

Investments traded in active markets are reported at their fair market value. Investments not actively traded are recorded at their cost less any impairment of their value.

To provide a more diverse and robust portfolio, HCF has committed to investing in alternative asset classes including real estate, infrastructure and private equity. These alternatives are consistent with the Foundation’s long-term investment horizon and liquidity requirements. Since these investments are not actively traded, they are valued at cost on the financial statements. In addition, the Hamilton Community Investment Fund (HCIF), which provides loans to local charities and not-for-profits, is reflected at cost in the investments. These outstanding loans to charities and not-for-profits total \$6.4 million.

Our public market portfolios are invested according to policy guidelines established by HCF’s Board of Directors. The portfolios are managed, in accordance with the policy, by three professional investment managers and are overseen by the Board’s Finance and Investment Committee. As an endowment builder, HCF’s policy focuses on long-term investing and this position is supported by developing and maintaining reserve accounts which are currently at their policy maximum. This committee reviews the investment managers’ reports quarterly to assess each manager’s performance. In addition, the committee formally evaluates the investment managers’

performance semi-annually. The investment policy sets out a target asset mix as well as a range around these targets. The managers use their discretion to invest the portfolios within this range. The following reflects the current and target asset mix. For the alternative investments, “target” is the amount committed to this asset class; “current” is the amount actually invested at year end.



# INVESTMENT RETURNS

Investment returns include:

Investment income during the year:

- Interest and dividends
- Realized gains on sale of investments
- Unrealized (losses) gains

Add/(Deduct):

- Investment fees
- Investment loss (income) allocated to funds held on behalf of third parties

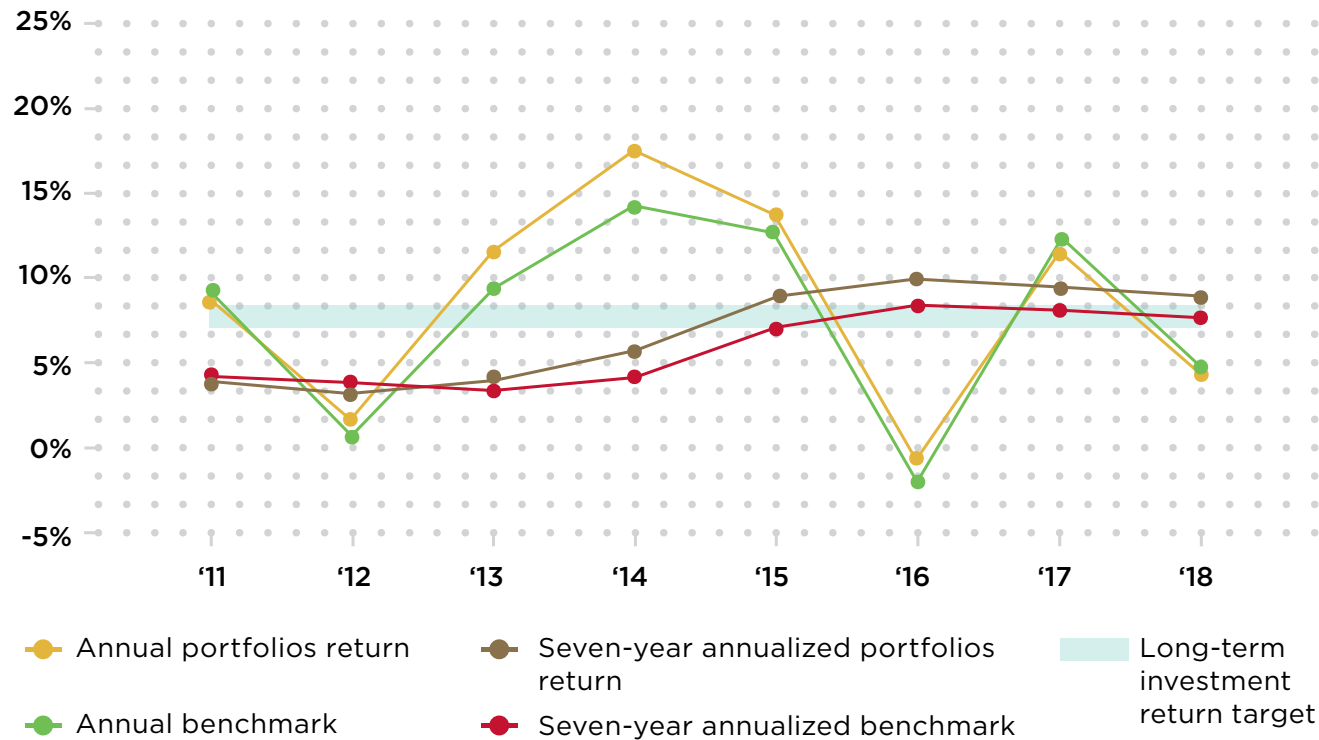
	2018	2017
	\$7,641,609	\$5,088,686
	5,744,545	5,352,894
	(6,841,927)	8,163,110
	6,544,227	18,604,690
	(840,616)	(768,827)
	(371,027)	(1,084,097)
	\$5,332,584	16,751,766

The unrealized gains (losses) reflect market volatility, which affects the year-end market value of our portfolio.

The following graph compares the two long-term portfolios with Jarislowsky Fraser and Connor, Clark & Lunn with respect to:

- HCF returns for publicly traded securities for each year against the annual investment policy benchmark for that year
- HCF’s seven-year annualized return against the seven-year annualized investment policy benchmark
- Both return rates against the targeted investment policy long-term return range

Benchmarks reflect the performance of each market index based on HCF’s specific target asset mix. Comparing actual results to the benchmark measures the value added by investment managers compared to the average market performance. HCF’s investment policy target is a long-term investment return in the 6.5 to 7.5 percent range.



As illustrated, investment returns over the past eight years have been extremely volatile. After a strong 11.2 percent return in 2017, the markets provided moderate returns until the fourth quarter of 2018, when volatility resulted in a modest annual return of 4.1 percent. The seven-year annualized return at 8.8 percent exceeds the target investment policy range and is 1.3 percent higher than the benchmark. As noted in the financial highlights, the current 10-year annualized return of 7.0 percent is within the target range and is higher than the benchmark by 1.0 percent.

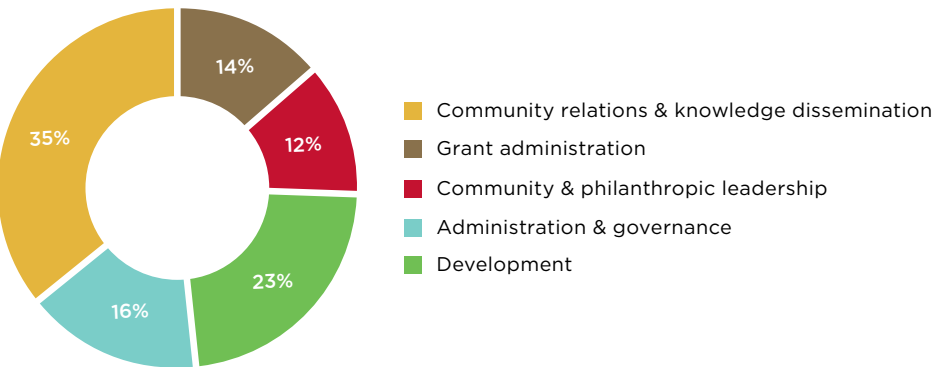
Due to the long-term nature of the alternative investments, their returns are not included in this analysis. Results for these investments are continually monitored and are reported when realized.

# OPERATIONS

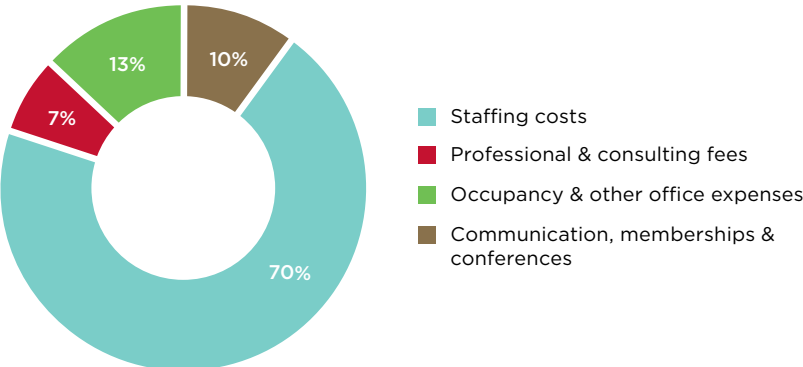
Operating expenses for the fiscal year ended March 31, 2018 total \$2.5 million, an increase of 7.0 percent. This increase includes costs related to our Vital Signs report which was last produced in 2012. Staffing costs related to the Foundation’s 20 employees represent 71 percent of HCF operating costs.

In addition to breaking out cost by type, operating costs are allocated to each of the Foundation’s operating areas: grants administration, community and philanthropic leadership, community relations and knowledge dissemination, development, and administration and governance. Examples of community and philanthropic leadership include convening around the city’s critical issues as described on pages 18-19 of this report. It also includes fostering the growth of philanthropy by sharing staff time and knowledge to support other charities.

COST BY OPERATING AREA

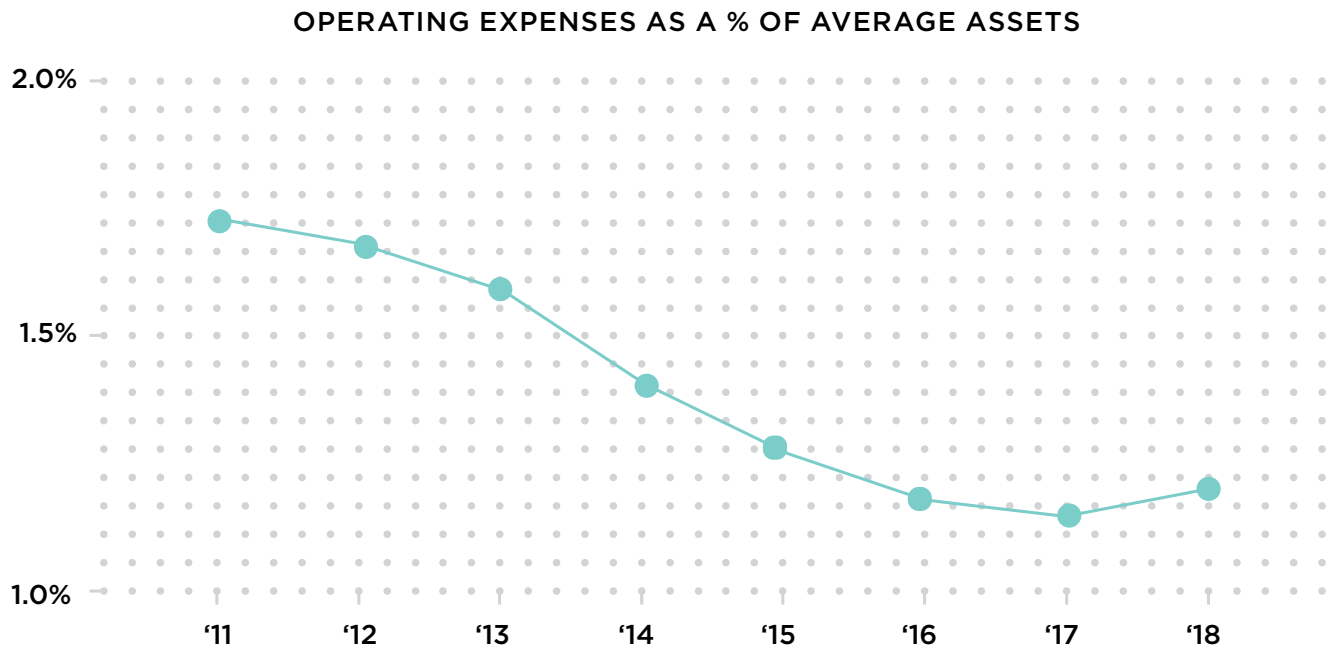


COST BY EXPENSE CATEGORY





The Foundation’s annual development expenses are not necessarily attributable to the donations received in that year. The nature of donations to the Foundation can result in costs preceding the receipt of the donation by several years (for example, donations through wills). As a result, consistent with the community foundation sector, operating costs are evaluated by a ratio of total operating expenses to average total assets. Ratios fall within a range depending on the size and stage of the community foundation’s development.



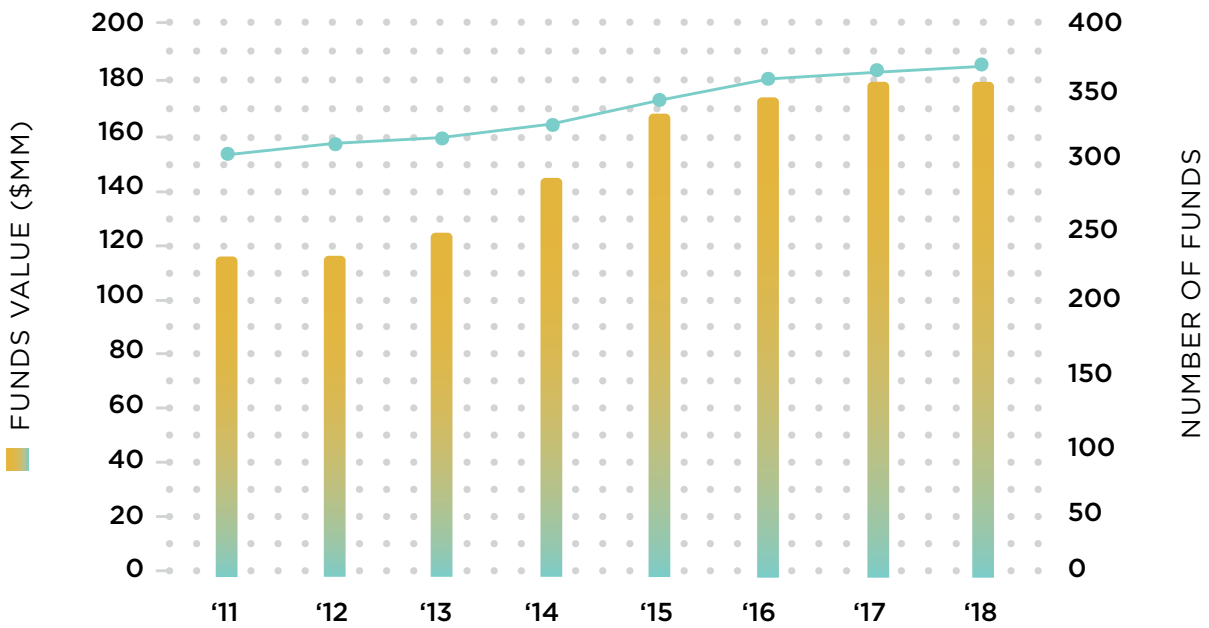
Management considers the ratio of 1.3 percent (1.2 percent in 2017) to be within an acceptable range compared with benchmarks established in the community foundation sector for a foundation of HCF’s size and stage. We continue to monitor both the actual results and the benchmarks on an ongoing basis.

## TOTAL ASSETS

Hamilton Community Foundation’s total assets of \$194 million at March 31, 2018 include balances of HCF funds and funds held on behalf of others at \$11.1 million.

## HCF FUND BALANCES

Hamilton Community Foundation’s fund balances represent accumulated donations plus the net investment earnings on these donations, minus granting and operating costs. Funds include both endowed and flowthrough funds. Endowed funds are held permanently and grant from investment earnings. Flowthrough funds are fully distributed as grants over a pre-determined term.



The funds balances have grown 55 percent to \$182 million at the year ended March 31, 2018 from \$117 million in 2011. Modest investment returns in 2018 muted the growth of funds, resulting in minimal growth despite the \$6.5 million in new donations this year. The number of funds has grown 22 percent to 371 from 303 in 2011.

# BOARD MEMBERS, VOLUNTEERS AND STAFF

Hamilton Community Foundation’s work is supported by both standing committees of the Board of Directors and board advisory committees. Membership of the board advisory committees includes both board members and a wide range of community volunteers whose expertise we rely on and appreciate. Standing committees of the board include: Governance & Board Effectiveness, Finance & Investment, and the Impact Investment Committee.

## BOARD ADVISORY COMMITTEES 2017-18

**Audit Committee**  
Mario Frankovich, MBA, CFA, *Chair*  
Cameron J. Beatty, CPA, CA  
Steve Borsellino, CMA  
Sarah Murphy  
Kathy Watts

**Chaney-Ensign Bursary Fund**  
Sandra Stephenson, *Chair*  
Terry Costello  
Anju Joshi  
Myrna Kelly  
Dr. John Misale\*  
Nancy Rundle  
Bob Savage  
*\*resigned from committee January 2018*

**Community Fund**  
Suzanne Brown  
Laura Cattari  
Tyler Cowie  
Dr. Juliet Daniel  
Angela Dawe  
Anju Joshi  
Milé Komlen

**Community Health, Education and Research Fund**  
Dr. Bill Evans, *Chair*  
Paul Armstrong  
Dr. Jane Aronson  
Marion Emo  
Dr. Gillian Goward  
Dr. Jenny Ploeg  
Dr. Leila Ryan

**Advisory Committee on Diversity and Inclusion**  
Milé Komlen, *Chair*  
Laura Cattari  
Anju Joshi  
Dr. Carolyn Rosenthal

**Edith H. Turner Foundation Fund**  
Renate Davidson, *Chair*  
Dorothy Bartalos  
Timothy Bullock  
Karen Burson  
Sondra Cornett  
Terry Horne, *Honourary Member*

**Finance & Investment Committee**  
Bob Savage, *Chair*  
Sarah Murphy, *Vice Chair*  
Dr. Justin Cooper  
Dr. Bill Evans

Milé Komlen  
Kathy Watts  
Gwyn Williams

**Hamilton Spectator Summer Camp Fund**  
Diana Frate

**Impact Investment Committee**  
Bob Savage, *Chair*  
Sarah Murphy, *Vice Chair*  
Laura Cattari  
Paul Gibel, FCPA, FCA (*Advisor*)  
Frank Gleeson, BBA, MBA  
Steve Kulakowsky  
Bill Young Jr. (*Advisor*)  
Kathy Watts  
Marita Zaffiro, BScPhm, MBA

**McCallum, McBride Fund Advisory Committee**  
John McCallum, *Chair*  
Kevin Beattie  
Carole Capling  
Linda Hughes  
Debbie-Ann Rashford

**Nomination Committee**  
Brent Foreman, *HCF Past Chair/Committee Chair*  
Anne Bermingham, *Chair, United Way Halton & Hamilton*  
Robert Hooper, *President, Hamilton Law Association*  
Mayor Fred Eisenberger, *City of Hamilton*

Teresa Smith, *Board Chair, Hamilton Community Foundation*  
Police Chief Eric Girt, *Hamilton Police Service*  
John Pryke, *Chair, Hamilton Chamber of Commerce*  
Dr. Gary Warner, *member-at-large*  
Pat Wright, *member-at-large*

**Ontario Endowment for Children & Youth in Recreation**  
Paul Lee-Chin, BA (Econ), *Chair*  
Alison Bochsler  
Deb Clinton  
Elizabeth Duvall  
Manny Figueiredo\*  
Melissa Ricci  
*\*resigned from committee November 2017*

# BOARD OF DIRECTORS 2017-18

**Teresa Smith**  
*President, Hamilton General Hospital*  
Board Chair

**Brent J. Foreman, BA, LL.B**  
*Partner, SimpsonWigle LAW LLP*  
Past Chair

**Bob Savage**  
*VP, Manufacturing, ArcelorMittal Dofasco (retired)*  
Treasurer

**Laura Cattari**  
*Advocate, Community Engagement and Media*

**Tyler Cowie**

**Dr. Juliet Daniel**  
*Professor, Department of Biology, McMaster University*

**Dr. Bill Evans**  
*Professor Emeritus, Department of Oncology, McMaster University*  
*President, Oncosynthesis Consulting Inc.*

**Manny Figueiredo\***  
*Director of Education, HWDSB*  
*\*resigned from board November 2017*

**Anju Joshi**  
*Associate (Teaching) Professor, Department of Health, Aging & Society, McMaster University*

**Milé Komlen**  
*Consultant, Ethical Associates Inc.*

**Stephen Kulakowsky**  
*Partner, Core Urban Inc.*

**Sarah Murphy**  
*Investment Advisor/Portfolio Manager, CIBC Wood Gundy*

**Kathy Watts**  
*Past Vice-President Finance & CFO, Hamilton Health Sciences*

**Beth Webel, CPA, CA, MBA, TEP**  
*Tax Partner, PwC*

**Marita Zaffiro, BScPhm, MBA**  
*President & CEO, Marchese Health Care*

**Terry Cooke**  
*President & CEO*  
Secretary of the Board

## STAFF

Staff as at March 31, 2018

**Terry Cooke**  
*President & CEO*

**Jill Anderson**  
*Advisor, Philanthropic Services*

**Annette Aquin, CPA, CA**  
*Executive Vice-President, Finance & Operations*

**Sharon Charters**  
*Manager, Grants*

**Grace Diffey, APR, FCPRS**  
*Vice-President, Community Relations*

**Allan Enriquez**  
*Administrator, Philanthropic Services*

**Sarah Glen**  
*Manager, Community Initiatives*

**Matt Goodman**  
*Vice-President, Grants & Community Initiatives*

**Morag Halsey**  
*Receptionist/Foundation Support Assistant*

**Abul Hassan**  
*Bookkeeper*

**Tami Henderson**  
*Administrative Assistant, Grants*

**Melissa Klaver**  
*Corporate Secretary/Executive Assistant, President & CEO*

**Angel Li**  
*Senior Accountant*

**Celeste Licorish**  
*Advisor, Philanthropic Services*

**Sheree Meredith**  
*Vice-President, Philanthropic Services*

**Michael Parente**  
*Communications Assistant*

**Jen Pearson**  
*ABACUS Grad Track Project Co-ordinator*

**Rose Taylor-Weale**  
*Scholarship and Bursary Project Lead*

**Tracy Varcoe**  
*Administrative Assistant, Community Relations/ Webmaster*

**Yulena Wan, CPA, CA**  
*Manager, Corporate Services*

**Yvonne Yeoh**  
*Executive Assistant, President & CEO/Finance & Operations*



# VOLUNTEERS 2017-18

Sincere thanks to the Mohawk College faculty, community partners and NLI alumni who co-facilitate the learning sessions within the NLI’s resident stream:

Melissa Adams	Brenda Duke	Catherine Johnston	Chris Parkinson
Maria Antelo	Chris Farias	Ahmad Firas Khalid	Steve Rowe
Julie Bérubé	Cole Gately	Tony Lemma	Pat Wright
Danielle Boissoneau	Susan Goodman	Angie Mallory	
Rebecca Costie	Ruth Greenspan	Cat Maracle	
Stephanie Davies	Jaclyn Hall	Sarah Merrit	

# ADVISORS

<b>Auditors</b> BDO Canada LLP	<b>Solicitor</b> Evans Sweeny Bordin LLP
<b>Bankers &amp; Custodian</b> Bank of Montreal and BMO Private Banking	<b>Investment Counsellors</b> Connor, Clark and Lunn Private Capital Ltd. Guardian Capital Jarislowsky Fraser Limited

Charitable number: 13052 7427 RR0001

# WE RESPECT YOUR PRIVACY

Hamilton Community Foundation does not rent, sell or trade its mailing list. Please contact us at any time if you do not wish to receive further mailings from us. Our privacy policy is available at [hamiltoncommunityfoundation.ca/privacy](http://hamiltoncommunityfoundation.ca/privacy)

# ABOUT HAMILTON COMMUNITY FOUNDATION

## We drive positive change in Hamilton by

- Helping people give in a way that has meaning to them and impact in the community.
- Supporting all aspects of community life through grants and financing to a wide range of charitable organizations and initiatives.
- Bringing people together to address priority issues that affect Hamiltonians.



For more information please visit [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca) or call us at 905.523.5600.





120 King St. W., Suite 700, Hamilton, ON L8P 4V2  
905.523.5600 | Fax 905.523.0741  
[hamiltoncommunityfoundation.ca](http://hamiltoncommunityfoundation.ca)  
[info@hamiltoncommunityfoundation.ca](mailto:info@hamiltoncommunityfoundation.ca)