



Unity in our Community / 2008



*It is indeed unity
that builds community.*

*Unified in the power
of philanthropy;*

*it is our partnerships,
donor support,
volunteers,*

*fund bolders,
grantees and our*

*community that make the
Foundation successful.*

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Our annual report is an opportunity for the Community Foundation of Mississauga to reflect back on the previous year; the achievements that advanced the Foundation and the challenges that strengthened us. In many ways, 2008 was a pivotal year for the Foundation. We experienced yet another year of exceptional growth in endowed assets, but we were also confronted with a significant downturn in the global equity markets. Through all of this, what is clear to the Foundation is that it is our partnerships, our support from our donors, volunteers, fund holders, grantees and our community that has made the Foundation successful and will help us meet the challenges that lie ahead. The Community Foundation of Mississauga is a remarkable story of success in the charitable sector. But only because of people coming together, *unified* in their belief in the power of philanthropy. It is indeed *unity* that builds community and we are pleased to highlight this theme in the 2008 Annual Report.

By year end 2008, the Foundation had achieved \$11.5 million in endowed assets. This is particularly remarkable as the Foundation experienced growth of approximately fifty percent. Through early 2008 however, equity markets began to slow followed in the third quarter by a period of rapid decline. For reasons which have now been widely discussed and will continue to be analyzed for some time, markets around the world were in decline. The Foundation was not immune to a difficult situation that was affecting so many, including the many different kinds of charitable organizations that hold endowed funds. The Foundation's Board reacted with thorough consideration of the situation and prudent determination of next steps. Information was provided to our fund holders about the current circumstance and how this might affect grant making in the next year. The Foundation reviewed its operating budget with the goal of increasing efficiencies and

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plans to ensure sustainability were implemented. Policies were targeted that will be reviewed and strengthened. Despite the emerging economic challenge, dedicated Board volunteers used their knowledge in unity to make sound decisions that will guide and sustain the Foundation in the future.

In this economic environment, acknowledging our community's donors is particularly important. The Foundation's donors and fund holders exemplify a commitment to unity. Together, their funds and donations are building a platform of sustainable grant making that will support the diversity of programs and services that enhance quality of life and community vitality in Mississauga in perpetuity. In 2008, donors made gifts totalling over \$4.5 million. This would be an achievement worth celebrating in any year for any size community foundation, but for one that is not yet ten years old and during these times, it is remarkable. Philanthropy is, at its core the

embodiment of empathy and caring for others. It is an acknowledgement that we are *unified* in a shared vision of building a better, a healthier, more inclusive and more vital community. The Community Foundation of Mississauga extends sincere appreciation to our donors.

Ultimately, one of the joys of helping to build the Community Foundation of Mississauga has been the past few years when endowed funds have grown and we have been able to put those funds to work making grants that supported the broadest range of charitable activities. In 2008, over \$300 thousand went back out to the community bringing our combined grant making total to over \$800 thousand in just a few short years. For example, the Foundation was able to provide grants in 2008 that improved access to the arts, provided safe places for vulnerable children and youth, provided a better start for newborns, enhanced educational opportunities, allowed people with disabilities to

participate in community, ensured access to good nutrition for children and families and so much more. The Community Foundation of Mississauga works to enhance philanthropy and provide donors with an efficient, effective one-stop source for their legacy gift so that we may build a better community. Integral in this role are our charitable partners. These organizations are doing transformative work. They are valuable partners with the Foundation and community donors, *unified* in our shared vision for Mississauga.

Along with growth in endowed assets and grant making, additional highlights included an Ontario Trillium Foundation grant that will enable the Foundation to hire the staff needed to drive the next stage of growth and development. As well, there was the implementation of the first ever “Marathon of Golf” ably coordinated by the energetic and dynamic Golf Committee, the formal Board approval of a three year Strategic

Plan, continued Policy and Governance development, the recruitment of new Board and committee volunteers, the first gift to the unrestricted Mississauga Fund, the move to new and expanded office space and more.

Busy, exciting, and inspiring, 2008 also proved to be a challenging year. That said, we have begun to see the profoundly positive impact the Foundation will have in Mississauga. We know that we have achieved these goals through commonality of purpose and vision on the part of donors, volunteers and our partners and stakeholders. We are *unified* in our commitment to community.



Ray Lessard
President,
Board of Directors



Eileen MacKenzie
Executive Director



The Community Foundation of Mississauga gratefully acknowledges the outstanding contributions of our donors and stakeholders. Their support is helping to build a better community by creating or contributing to endowed funds, supporting the Foundation's events and programs and ensuring the sustainability of the Foundation's operations.

Along with our community, we extend appreciation to the individuals and organizations listed who made lead gifts in 2008.

President's Circle

Anonymous

Anonymous

Mississauga Circle

Estate of
Kathleen Ann Drury

Gary Reamey

Robert and Joanne Wordham

Champion's Level

Tom and Stella Cooney

Michael D. Cristofaro
and Family

R. Lessard Family

Mississauga
Real Estate Board

Patron's Circle

Anonymous

Mendel Cohen

Winston Meyer

Misscon Foundation
and the Rainbow Ball

Ontario Trillium Foundation

Brad and Kathy Shoemaker

Leader's Level

CIBC World Markets
Children's Miracle
Foundation

Steve and Katie Mahoney
Golf Tournament

Elizabeth Nilsen

Robert D. Scott

We recognize donors who have made a receipted gift or a grant directly to the Community Foundation of Mississauga in excess of \$500 in the 2008 fiscal year. If there are any errors or omissions, please accept our apologies and contact us at 905-897-8880 so that we may adjust our records and provide appropriate acknowledgement of your support. To those who made a pledge or a gift via the Canada Helps web site, please know that the Foundation sincerely appreciates your support but may not have access to information about your gift for recognition purposes.

Donors and Friends

Anonymous	Robin Kingsmill
Robert Addison	Gordon LeRiche
Assante Wealth Management	Fred and Eileen MacKenzie
BMO Employee Charitable Foundation	Andre Mak
Canoe Financial LP	Steven and Karen Offer
Peter and Karen Campbell	Teamsters Local Union 938
CI Investments	Tone-A-Matic International Inc
CIBC	Unitarian Congregation of South Peel
CIBC Commercial Banking	George and Helen Vari Foundation
CIBC Private Wealth Management	Kim Williams
CIBC World Markets Canada	Laurie Williamson
Erindale Environmental Association, University of Toronto Mississauga	Pontiac Buick
Rick Holden	JoAnne Winkworth
Kanef Group of Companies	Erik Yeo
	Skicousi Ski Club



FUNDS

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Creating endowed funds is one of the most important services that community foundations offer to donors. People from all walks of life can create or contribute to existing funds which are held in perpetuity by the Community Foundation of Mississauga. These contributions are then pooled and grants are made from the income earned on those investments. In this way, people are finding that they can create a lasting legacy that will support their philanthropic interests and their community for good, for ever.

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The Foundation offers a wide range of funds that donors might consider to best fit their interests. We also offer donors the ability to name their fund at certain fund minimums. Donors can establish a fund in their own name, their family's name, the name of anyone they wish to honour, or an organization.

The following is a list of named funds held by the Community Foundation of Mississauga as of year end 2008.



Mississauga Fund

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

Robert D. (Bob) Scott Fund

Field of Interest Funds

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

Paul Coughlin Fund

Environment Fund

R. Lessard Family Fund



Donor Designated Funds

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

Ida E. Barnes Memorial Fund

Carter Fund

Chief Mbulu Family Fund

CIBC Wood Gundy Fund
for Children's Charities

Cristofaro Family Fund

Kathy A. Drury Fund

Gordon Fund

Hazel McCallion
Endowment Fund

Liz Nilsen and
Bernie Gross Fund

Reamey Family Fund for
the Women and Children
of Interim Place

Brad and Kathy Shoemaker
Fund for World Service and
Development

Donor Advised Funds

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

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



Operating Endowed Fund

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

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

Funds Held for Others

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

Benares Museum Fund

United Way of Peel
Forever Fund

Emerging Fund

These are funds that have been established with an initial gift and an intent to reach the fund minimum for a type of fund as listed above.

Winkworth Family Fund

In addition to the types of funds listed above, the Community Foundation of Mississauga offers more ways for donors to get involved. Included in these additional types are the following:

Charity Endowed Fund

An option that the Foundation offers to charitable organizations that provides them with the resources and expertise to build their own endowed fund.

Flow Through Fund

A fund where the donor can use the grant making expertise of the Foundation to disburse funds over a period of time generally within two years.





Grant Recipient	From Fund	Grant Amount	Program Supported
Credit Valley Conservation Foundation	Pendle Fund	\$100,000	Living Discovery Centre
Supportive Housing in Peel	Pendle Fund	\$25,000	Building Human & Social Capital
Art Gallery of Mississauga	Pendle Fund	\$20,000	My Mississauga
MS Society of Mississauga	Pendle Fund	\$18,000	Social/Recreational Enrichment Program
Our Place Peel	Pendle Fund	\$10,000	Bridging the Gap
YMCA	Pendle Fund	\$9,000	YKnot Abilities Program
Silent Voice Canada	Pendle Fund	\$3,000	Summer Camp Program
Orchestras Mississauga	Pendle Fund	\$5,000	More Sound Project
Support & Trustee Advisory Service	Pendle Fund	\$10,000	Peace of Mind Project
Best Start Health Coalition	Pendle Fund	\$25,000	Post-natal Pilot Project
Boys and Girls Club of Peel	R. Lessard Family Fund	\$870	Breakfast for Kids
Our Place Peel	Paul Coughlin Fund	\$900	Emergency Youth Shelter Program

Grant Recipient**From Fund****Grant Amount****Program Supported**

Silent Voice

Paul Coughlin
Fund

\$1,000

Summer Program

Peel Children's
Aid FoundationMeyer Family
Fund

\$1,000

Bursary Program

Interim Place

Meyer Family
Fund

\$1,000

Children's Safety &
Healing Project

Blackwood Gallery

Meyer Family
Fund

\$500

Kid's Art Camp

Junior Achievement

Meyer Family
Fund

\$500

Diversity in Action Program

Interim Place

Reamey Family
Fund Flow Thru

\$10,000

General Purposes

Boys and Girls Club of Peel

EPDM Flow Thru

\$30,000

Food Delivery Vehicle

Community Living Mississauga

EPDM Flow Thru

\$23,760

Instant Access Bus Passes

Foodpath

EPDM Flow Thru

\$11,195

Transportation for Families

Mississauga Convention
Centre FoundationPendle Fund
Flow Thru

\$1,350

Peel CAS Holiday Party for Children

Wilfrid Laurier University

Joe Schembri
Scholarship Fund

\$2,000

Scholarship



MONIES

STATEMENT OF FINANCIAL POSITION

	<i>December 31,</i>	
	2008	2007
Assets		
Bank	\$ 30,271	\$ 17,012
Bank — <i>interest bearing</i>	95,549	49,142
Accounts receivable	37,037	69,213
Prepaid expenses	3,405	—
	<hr/>	<hr/>
	166,262	135,367
Investments	11,397,331	9,631,462
Fixed Assets	5,033	4,022
	<hr/>	<hr/>
	\$ 11,568,626	\$ 9,770,851
Liabilities		
Accounts payable	\$ 11,243	\$ 21,607
Deferred revenue	9,000	—
Managed Funds	140,011	145,298
	<hr/>	<hr/>
	160,254	166,905
Net Assets		
Endowment Fund	11,283,537	9,470,432
Capital Fund	5,033	—
Operating Fund	119,802	133,514
	<hr/>	<hr/>
	11,408,372	9,603,946
	<hr/>	<hr/>
	\$ 11,568,626	\$ 9,770,851

STATEMENT OF ENDOWMENT FUND

	<i>For the year ended</i>	
	2008	2007
Revenues		
Contributions to Funds	\$ 4,581,446	\$ 3,106,093
Investment Income (<i>loss</i>)	(2,359,795)	523,027
	<hr/>	<hr/>
	2,221,651	3,629,120
Expenses & Disbursements		
Management fees	99,471	86,936
Grants to the community	309,075	355,005
	<hr/>	<hr/>
Total Expenses & Disbursements	408,546	441,941
	<hr/>	<hr/>
Excess of Revenue over Expenses	1,813,105	3,187,179
Fund balances, beginning of year	9,470,432	6,283,253
	<hr/>	<hr/>
Fund balances, end of year	\$ 11,283,537	\$ 9,470,432

STATEMENT OF OPERATIONS

	<i>For the year ended</i>	
	2008	2007
Revenues		
Donations	\$ 50,141	\$ 64,515
Grants & Other Income	13,000	4,342
Investment Income (<i>Loss</i>)	(45)	4,020
Management Fees	101,667	89,335
Special Events	57,573	34,785
	222,336	196,997
Expenses & Disbursements		
Administration	144,651	112,974
Fund Development	16,780	14,825
Investment Management Fees	37,826	35,477
Special Events	30,394	18,664
	229,651	181,940
Excess (Deficiency) of Revenue over Expenses	(7,315)	15,057
Transfer (to) from Capital Fund	(6,397)	—
Transfer (to) from Special Projects Reserve Fund	—	1,287
Operating Fund, beginning of year	133,514	117,170
OPERATING FUND, end of year	\$ 119,802	\$ 133,514

Community Foundation of Mississauga

Condensed Notes to the Financial Statements

December 31, 2008

I. Significant Accounting Policies

Investments: are classified as “Held-for-trading” and as such, are valued at the quoted market value. Investment Income, including realized and unrealized gains net of losses, is allocated to the pool of Endowment, Managed and Operating Funds.

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

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

Community Foundation of Mississauga

Condensed Notes to the Financial Statements

December 31, 2008

2. Investment Management

Investments are professionally managed in accordance with the investment policy of the Foundation by Toronto Community Foundation, Saxon Mutual Funds, Investors Group and BMO Nesbitt Burns.

3. Audited Financial Statements

The complete Financial Statements for the year ended December 31, 2008 have been audited by Withey Addison LLP, Chartered Accountants and are available on request from the Foundation.

	2008	2007
Community Foundation of Mississauga Pooled Funds	\$ 3,434,668	\$ 3,579,980
Investments managed by Personal Investment Advisors	7,962,663	6,051,482
Fair market value	<u>\$ 11,397,331</u>	<u>\$ 9,631,462</u>



STORIES



“It was a very clear and definitive objective of ours to help make a positive change in people’s lives and we wanted to be able to help as many people as possible.”



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In 2002, a dear friend, Mrs. Kathy A. Drury, and I developed the idea of creating our own foundation with the Mississauga Convention Centre. It would be called the *Mississauga Convention Centre Foundation* and it would provide the opportunity and resources to very efficiently raise money for worthy charities in our community of Mississauga. It was a very clear and definitive objective of ours to help make a positive change in people's lives and we wanted to be able to help as many people as possible. We developed an annual fundraising event, *The Rainbow Ball* and through this event, we had tremendous success in raising funds. It was decided that the Community Foundation of Mississauga would become our partner, our way of giving back to the community. Proceeds raised from *The Rainbow Ball* would be passed to the administration of

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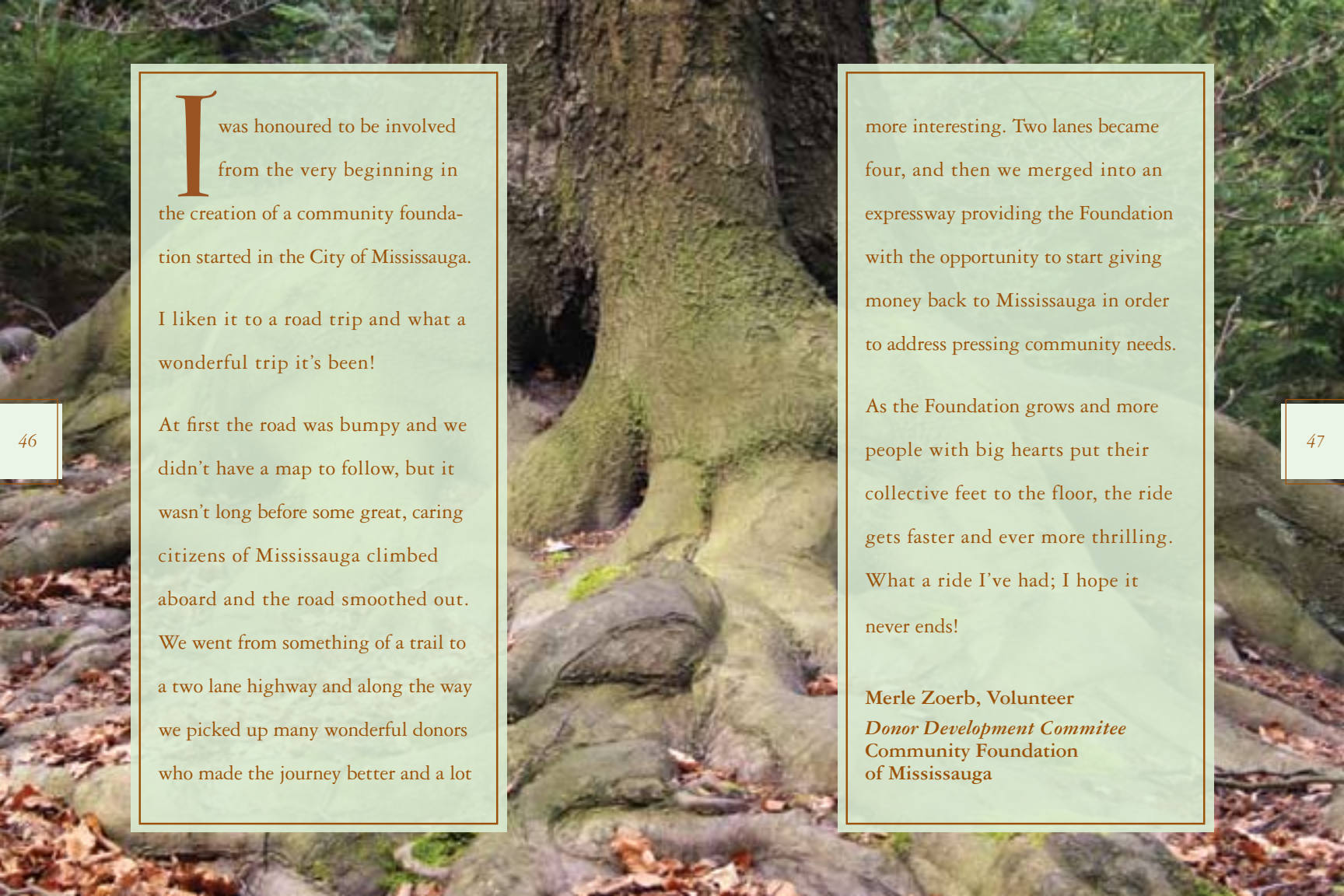
The Community Foundation of Mississauga. For us, it seemed to be the most efficient and direct way for us to help many people. Our investment in The Community Foundation of Mississauga, went well beyond the money raised from *The Rainbow Ball*. The team of professionals, with whom we entrusted, built a strong Community Foundation and a system by which our donations would grow and help the people in our community for years to come.

The Community Foundation of Mississauga, which has been developed on strong leadership and management skills, sound investment strategies and a strong will to make our community a better place for all, has made us very proud to be part of our community.

Cliff Silveira
Mississauga Convention Centre
Mississauga Convention
Centre Foundation



“We went from something of a trail to a two lane highway and along the way we picked up many wonderful donors who made the journey better and a lot more interesting.”



I was honoured to be involved from the very beginning in the creation of a community foundation started in the City of Mississauga.

I liken it to a road trip and what a wonderful trip it's been!

At first the road was bumpy and we didn't have a map to follow, but it wasn't long before some great, caring citizens of Mississauga climbed aboard and the road smoothed out. We went from something of a trail to a two lane highway and along the way we picked up many wonderful donors who made the journey better and a lot

more interesting. Two lanes became four, and then we merged into an expressway providing the Foundation with the opportunity to start giving money back to Mississauga in order to address pressing community needs.

As the Foundation grows and more people with big hearts put their collective feet to the floor, the ride gets faster and ever more thrilling. What a ride I've had; I hope it never ends!

Merle Zoerb, Volunteer
Donor Development Committee
Community Foundation
of Mississauga

“Our partnership with the Community Foundation of Mississauga has enabled the YMCA to provide access and inclusiveness for youth with physical disabilities through the YKnot Abilities Program.”

As a charity working in the community for more than 155 years, the YMCA of Greater Toronto continues to offer accessible programs and services providing people with opportunities for personal growth, community involvement, and leadership.

The Mississauga YMCA provides a variety of programs to more than 13,500 members who represent the diversity of the Mississauga communities.

Our partnership with the Community Foundation of Mississauga has enabled the YMCA to provide access and inclusiveness for youth with physical

disabilities through the YKnot Abilities Program. Now young people can explore their abilities and build confidence to pursue their goals. The YKnot Abilities Program provides a place where brothers and sisters, able-bodied and disabled can all play together.

This generous investment from the Community Foundation of Mississauga allows the YMCA to bring youth together and build strong kids, strong families and strong communities.

Janet Johnson
General Manager,
Mississauga YMCA



COMMITTEES

The word "COMMITTEES" is written in a decorative, brown, serif font. The letters are stylized with intricate flourishes. Green leaves and thin brown branches are integrated into the design, growing from the top and sides of the letters, particularly around the 'M', 'I', 'T', and 'E's.

Board of Directors

Ray Lessard, *President*
Steven Offer, *Vice President*
Peter Campbell, *Treasurer*
Tom Cooney, *Secretary*
Paula Deering
Mary Main
Emmanuel Mbulu
Winston Meyer
Cliff Preston
Gary Reamey
Jane Sanders*

Honourary Chair

Mayor Hazel McCallion

Donor Development Committee

Steven Offer, *Chair*
Tom Cooney
Mike Cristofaro
Jennifer Doyle*
Rick Holden
Winston Meyer
Jean Murray*
Fred Ryall
Helen Seibel
Suzanna Winsborough
Bonnie Yagar
Merle Zoerb

Finance and Audit Committee

Peter Campbell, *Chair*
Ilya Bogorad
Mary Main
Cliff Preston

Granting Committee

Paula Deering, *Acting Chair*
Lena Bassford
Marcus Coutou
Maja Prentice
Jane Sanders*
Erica Teklits

Investment Committee

Winston Meyer, *Chair*
JoAnne Anderson
Peter Campbell
Ray Lessard
Daniel McCartney
Louis Pivar*



**Environmental Fund
Kick Start Committee**

Rick Holden

Aubrey Iwaniw

Katie Mahoney

Lea Ann Mallett*

Ellen McGregor

Andrea McLeod

**Golf Marathon
Committee**

Steven Offer, *Chair*

Susan Amring

Tom Cooney

Mike Cristofaro

Rick Holden

Helen Seibel

William Smith

Joanne Stevenson

**Resigned in 2008.*





MISSION



Our mission is to match acts of

caring with community needs.

Our organization is committed to protecting the privacy of the personal information of its employees, members, donors and other stakeholders. We value the trust of those we deal with and of the public and we recognize that maintaining this trust requires that we be transparent and accountable in how we treat the information that you choose to share with us. During the course of our various projects and activities, we may gather and use personal information. Anyone from whom we collect such information should expect that it will be carefully protected and that any use of or other dealing with this information is subject to consent.

Our privacy practices are designed to achieve this. To review our full privacy policy, visit our web site at www.CFofM.org.

The Community Foundation of Mississauga

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