Community Foundation of Halton North

*For Good For Ever*

# The First 10 Years

# THE BEGINNING

In 2011 Brad Clements identified the need for a Community Foundation in Milton. Brad set about finding the way to make this happen and invited several community members he felt would be supportive. He promoted the idea for their support and input at an early morning breakfast meeting, and in spite of the early hour, the idea received an enthusiastic reception, promises of support and a small committee was formed to bring this idea to fruition. As the group felt it should include the communities of Acton & Georgetown the name - Community Foundation of Halton North - was suggested by Anne Eadie and accepted by all. It was now full speed ahead and by October 26th with the assistance of Michael Shepherd, CEO of Halton Community Credit Union, CFHN had received a registered charitable number and was welcomed as a member of Community Foundation of Canada.

On November 9th the first formal meeting was held and the Founding Board of Directors elected.

- Brad Clements, Chair
- Michael Shepherd, Vice Chair
- Bill Mercer, Treasurer.
- Anne Eadie, Secretary
- Hal Watson, Director

As more volunteers were recruited and the foundation grew committees were formed to work on the creation of a Logo, Vision & Mission Statements, and Granting Policies & Procedures were established. Annual audits were initiated.

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# GOVERNANCE

The Foundation has been very fortunate over the years to have many North Halton residents share their professional expertise and serve as volunteer Board members, or committee members.

**Current Board Members**

Brad Clements, Chair, November 9, 2011
Marty Hughes, Vice-Chair, June 1, 2014
Anne Eadie, Secretary, November 9, 2011
Mervyn Fonseca, Treasurer, October 17, 2012
Joy Anderson, March 27, 2012
Darryl Demille, September 17, 2014
David Illingworth, October 18, 2017
Bill Mann, June 19, 2019
Lisa Raitt, January 15, 2020
Hal Watson, Director November 9, 2011

**Retired Board Members**

| | | | |
|---|---|---|---|
| Robert Rubino | May 26, 2018 | to | June 19, 2019 |
| Mark Maramieri | May 28, 2014 | to | February 21, 2018 |
| Sharon Coffen | October 17, 2012 | to | January 21-2015 |
| Linda Bischoff | March 27, 2012 | to | November 20, 2019 |
| Mike Shepherd | November 9, 2011 | to | May 28, 2014 |

**Staff**

Sue Lawrenson  Now Executive Director , was hired on 2nd July 2013 as Director, Development and Community Engagement.

**Committees formed**

-Marketing: early 2012
-Finance: August 2013,
-Human Resources: operational early 2013
-Granting: June for the 2014-15 term
-Advisory: October 2015
-Operations: April 2015
-Fund Development: July 2015
-Investment: June 2018

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# TIMELINE

CFHN

## 2011

- First formal meeting of the Community Foundation Board of Directors was held on November 9, 2011
- Received seed funding of $9500 from the Milton Millennium Community Residences Corp. through Brad Clements

## 2013

- Ontario Trillium Foundation Grant approved providing CFHN with $189,000 over three years
- First gift is received – donated by Brad & Jo-Anne Clements.
- First Pooled Fund is Endowed - $101,000

## 2014

- CFHN reports $771,127 in receiptable funds
- Town of Milton established a $10,000 endowed fund directed to Milton Centre for the Arts.
- Anonymous donor gift of $734,000 was received prior to year end
- Seven Endowed Funds - $853,000

## 2015

- Nine Endowed Funds - $964,000

## 2016

- CFHN participated in the Canada 150 Fund. A Board of Director's Fund of $2,000 is created, matched by Community Foundations of Canada. Halton Hills Public Library was recipient of the grant for Indigenous studies.
- United Way Milton donates $150,000 from their funds to the Mario Belvedere Fund for United Way.
- Milton Historical Society creates an agency fund of $5,000
- 10 Endowed Funds - $946,000

# TIMELINE

CFHN

## 2017

- CFHN endowment reaches $1,000,000;  is officially announced in a Press Release
- 13 Funds Endowed - $1,150,000

## 2018

- Grants - $72,167
- 15 Endowed Funds - $3,150,000

## 2019

- 15 Endowed Funds $3,700,000

## 2020

- A COVID-19 response fund is established by the Board of Directors , All Donor Advised Funds  participated and grants were distributed to support Food Security Programs
- CFHN’s total endowment at December 31, 2020 is $4,318,350

## 2021

- CFHN totals 16 Endowments of $5,000,000

# THE MARIO BELVEDERE FUND FOR UNITED WAY

Community Foundation of Halton North

2015

The Mario Belvedere Fund for United Way in Milton was initially established with funds raised from participants at Mayor Krantz's Golf Tournament for United Way in Milton.  Grants from this fund are distributed only in Milton.

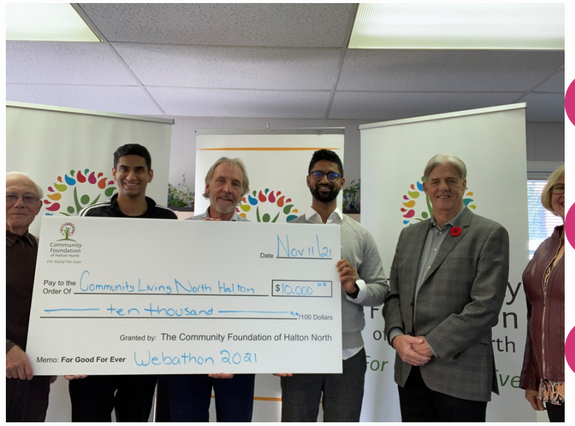
The Mayor’s Golf Tournament for United Way in Milton - Mario Belvedere Fund for United Way

- Total received in 2015:$44,935
- Total received in 2016:$15,100
- Total received in 2017:$34,503.73
- Total received in 2018:$36,900
- Total received in 2019:$32,182.63

In 2017 the Mario Belvedere Fund received a further $150,000 from the United Way of Milton Legacy Fund.

With grants being distributed and investment growth as of September 30, 2022 the total now stands at– $340,000

# COMMUNITY PRESENCE & GROWTH




2013

July 1: First office location 251 Main St. E., Milton (Chamber of Commerce Building)

October 16: Website launched

2014

February 11: Public Launch of CFHN held at the Milton Chamber of Commerce Building

May 28: First annual meeting is held

2017

May 17: Cogeco Television presents a story based on CFHN reaching $1,000,000 in endowed funds

November 15: CFHN launches its first Showcase event generating $2,000. Approximately 260 attendees and 150 performers

November 15: Upgraded Website unveiled

2020

September 28: Relocated to new office in Towne Square.

2021

October 2: First (Virtual) Webathon is a huge success $100,000 received

October 26: Fondant Software: a Fund Development Software, purpose-built for Community Foundations, is purchased

December 15:  CFHN is ten years old

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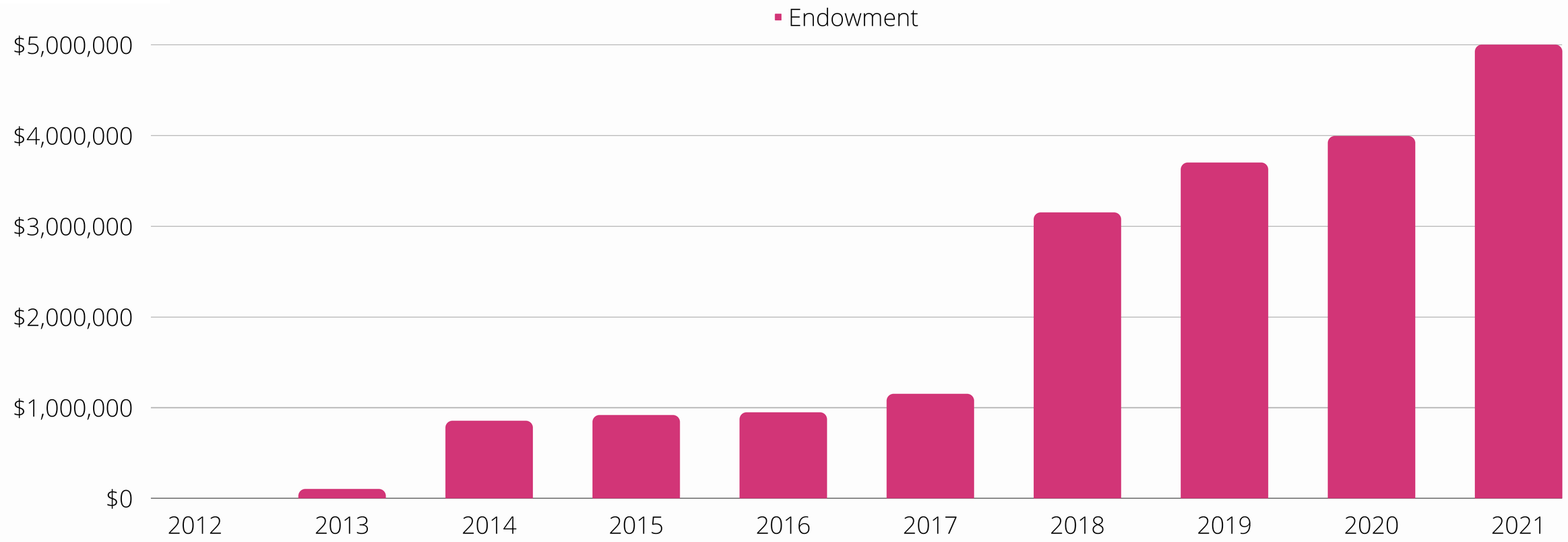
# ENDOWMENT FUND GROWTH



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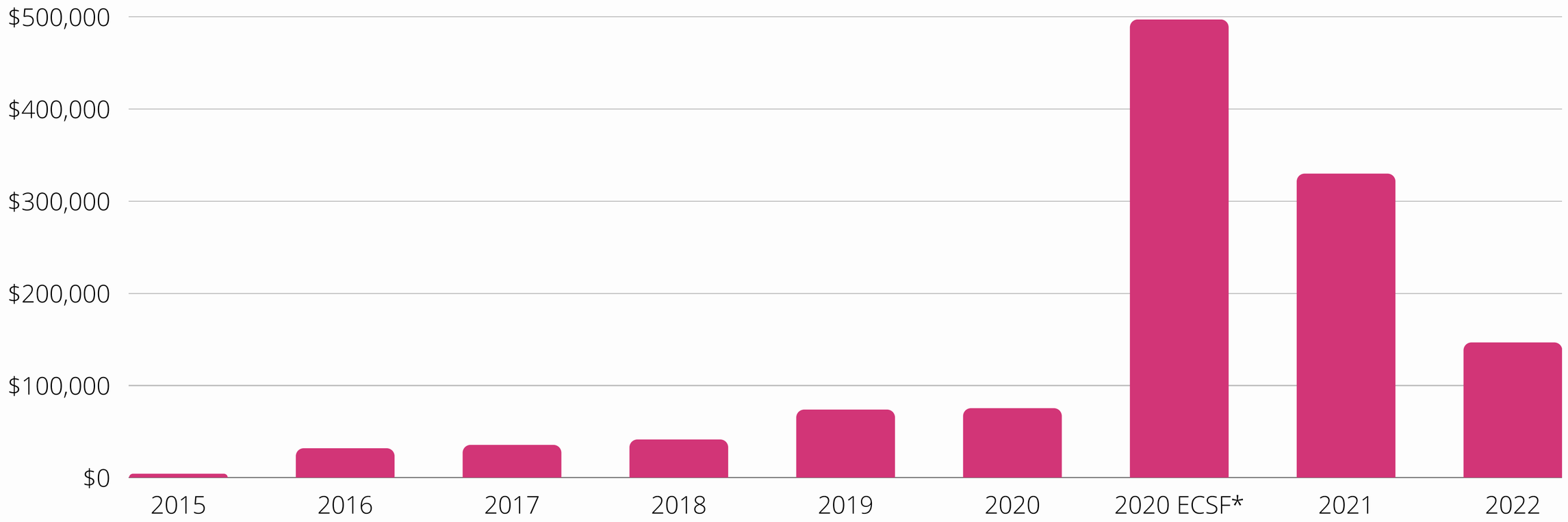
# GRANT DISTRIBUTION




*Emergency Community Support Fund, a funding initiative in partnership with the Government of Canada

# THE LOGO STORY

The tree was chosen as a representation of family and community. It symbolizes the importance of a community working together, to create a legacy, to build and support a living and vibrant community for future generations. As a tree changes through the seasons; our communities will experience change through growth and expansion.

The three heads show strength in numbers and that possibilities are endless when people work together.

The branches on the tree encourage planning and support. The upward motion of the branches signifies celebration and success. The multi-coloured leaves suggest a season of change. The vibrancy of those colours celebrate life, enjoyment and a bright future while also representing our multicultural community.

The trunk and roots of the tree symbolize the strength of our community. The beautiful green colour shows growth and expansion and the wealth of the community.

Community Foundation of Halton North

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