

20TH ANNIVERSARY

OCF IMPACT

2023 ANNUAL REPORT



Looking Forward...Giving Back!

LEADERSHIP MESSAGE

We celebrated a remarkable milestone in 2023. Twenty years ago, the relentless dedication of a group of community-minded individuals paid off and Oxford Community Foundation achieved charitable status.

We thank and honour the Foundation's passionate and determined founder Pat Smith as well as its first board of directors pictured here.

Since its humble beginnings, the Foundation has disbursed almost \$2 million in grants to over 115 charitable organizations, fostering lasting change and providing essential support to those in need within our beloved Oxford County. None of this would have been possible without the incredible support from you, our donors, volunteers, partners, and staff. We are deeply grateful for your commitment to the Foundation and to our shared vision to make Oxford better.



Back Row: Barry Hunt, Earl Shea, Len Reeves, George Klosler, Doug Eckel, Ken Whiteford
Front Row: Kelly Gilson, Pat Smith, Joan Bartlett, Rosemary George, Janet Stephens

It is our pleasure to present to you the Foundation's 2023 Annual Report. In 2023, the Foundation granted \$546,524 to 40 community partners and 18 students pursuing post-secondary education or an apprenticeship program.

The Foundation received \$518,805 in donations. Several fundholders increased the granting power of existing funds and one new fund was established. The Woodstock Chamber of Commerce established a fund with the purpose of providing grants each year for education and support for small businesses and initiatives that build a stronger community.


Thanks to your ongoing support, your community foundation continues to make a meaningful and lasting impact on those who live, work, and play in this place we call home. As you page through this report, you will see the impact of your generosity.

The present board of directors carries forward the visionary work initiated by our founders. We thank four directors who have completed their terms or have stepped down; Neil Dolson, Rosemarie George, Don Hilborn and Bill Mackesy. They served the Foundation extremely well and will be missed. We welcome four new great additions to the Board; Izabela Bielaska, Jamie Forrest, Barry Foster, and Alan Taylor.

As we look ahead to the future, we know there are more opportunities and challenges to be addressed. That is why the Board and staff are actively working to build the Foundation's permanent endowment funds. Our goal is to have \$10 million in permanent endowment funds by 2029. We know it's ambitious and we know our community deserves it.

Thank you for your continued support and for being a vital part of the Foundation's success.


Keith Stevens
Chairperson, Board of Directors


Louise Wardrop
Executive Director

A member of:



COMMUNITY
FOUNDATIONS
OF CANADA
all for community

FONDATIONS
COMMUNAUTAIRES
DU CANADA
ensemble pour tous

2023 OXFORD COMMUNITY FOUNDATION BOARD OF DIRECTORS:



Keith Stevens,
Chair



Rosemary George,
Vice-Chair



Neil Dolson,
Treasurer



Bill Mackesy,
Past Chair



Jade Davies-Phillips



Lynne DePlancke



Selina Guy



Brian Hadley



Don Hilborn



Kim Parker



Karen Sample



Kelly Gilson,
*ex-officio United
Way of Oxford*

STAFF:



Heather Haldane,
*Office & Grants
Administrator*



Louise Wardrop,
Executive Director

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COMMUNITY IMPACT

The Oxford Community Foundation (OCF) is deeply committed to our local community and has granted almost 2 million to more than 115 local charitable organizations. In 2023 alone, the Foundation granted \$546,524 to 40 community partners and 18 students pursuing post-secondary education or an apprenticeship program.

Local funds provide an opportunity for donors to ensure their gift stays local. \$128,404 was granted from 34 local funds. Along with keeping money in Oxford for Oxford through these local funds, OCF brings new money to Oxford. In 2023, the Foundation brought in \$392,000 in partnership with the Community Foundations of Canada and the Government of Canada's Community Services Recovery Fund. The Fund supported one-time projects that invest in the systems and processes involved in creating the internal workings of an organization's overall efficient and effective structure. Quite simply, these grants helped 12 local organizations improve the way they do their work. Additionally, \$26,120 was granted through the Maple Leaf Community Fund in honour of Harvey and Erma Beaty in support of the capital-related needs of food security programs that promote dignity and build individual and community capacity.

It is a privilege for us to support community-driven projects across all aspects of our community and across our entire county through these grant programs. We hope the stories of community impact in the following pages inspire you.

COMMUNITY & SOCIAL SERVICES

COMMUNITY OPTIONS FOR JUSTICE OXFORD



\$39,250 from the **Community Services Recovery Fund** funded health and safety infection control consultation and policy development. The organization's non-residential, justice-based programs are aimed at addressing the needs and providing crucial counselling services of youth and adults who are referenced or are seeking support.

HELPING HAND FOOD BANK



Grants of \$1,100 from the **William & Mary Mackesy Community Fund** and \$1,308 from the **Builders & Founders Funds** supported transportation services for food bank users, mostly seniors, who lack access to transportation after receiving food and food-related products at the food bank. Residents make their way to the food bank by walking, public transportation, or biking. The food bank collaborates with a local taxi company to drive them home, with taxi drivers going above and beyond to assist them in handling the grocery bags, showing a great spirit of cooperation and support within the community. Food-bank users have access to essential food regardless of physical limitations and weather conditions.

DOMESTIC ABUSE SERVICES OXFORD



\$6,500 from the **Maple Leaf Community Fund honouring Harvey and Erma Beaty** enabled DASO to enhance its Nurtured Families program, which provides essential life skills and teaching moments to service users and their children. The grant was used to purchase two upright freezers, which will support the program's focus on teaching children basic nutrition knowledge and skills.

SOUTHWESTERN PUBLIC HEALTH



\$400 from the **Maple Leaf Community Fund honouring Harvey and Erma Beaty** enabled the purchase of supplies for a thriving tower garden at Winchester Public School in Woodstock. The project will continue, with the kids responsible for every stage of the process, from planting seeds to harvesting and creating salads. This hands-on experience is not only a fun and educational activity, but also a great way for the kids to learn about sustainability and the importance of healthy eating.

MULTI-SERVICE CENTRE TILLSONBURG



\$1,000 from the **Alabastine-Wilkinson Family Fund**, \$138 from the **Dolson Family Fund** and \$350 from the **Doug & Yvonne Eckel Fund**, was used to organize social gatherings, like Christmas and Valentine's Day celebrations, creating a welcoming and engaging community for seniors, promoting inclusiveness and independence and also providing a space to connect over a coffee and have a good time. The Centre also received grants of \$421 from the **Maple Leaf Community Fund honouring Harvey and Erma Beaty** for hard shell containers for their Meals on Wheels program, and \$15,295 from the **Community Services Recovery Fund** to implement a Human Resources Information System.



VON ONTARIO STUDENT NUTRITION PROGRAM



\$5,000 from the **William & Mary Mackesy Community Fund** and \$11,000 from the **Maple Leaf Community Fund honouring Harvey and Erma Beaty** was used to buy 3 industrial dishwashers for the St. Michael's Catholic School, the Winchester Street Public School in Woodstock, and the Thamesford Public School in Thamesford. "Our new dishwashing sanitizer has been a game-changer for our healthy snack program. It not only saves us valuable time but also reduces costs associated with individual wrapping, aligning seamlessly with our commitment to safe food handling standards, ensuring the well-being of the children and staff we serve" said Brandi Z. lead volunteer for Thamesford Public School's Student Nutrition Program.

MORE COMMUNITY & SOCIAL SERVICES GRANTS:

- \$17,315 to **Big Brothers Big Sisters Oxford** from **Community Services Recovery Fund** for tablets and conference system to support virtual meetings and training.
- \$54,250 to **Community Living Tillsonburg** from **Community Services Recover Fund** to support the development of their new Strategic and Operational Plans.
- \$6,800 from **Operation Sharing Fund** and \$1,000 from **Stevens Fund** to **Operation Sharing**.
- \$42,450 to **Social Planning Council Oxford** from the **Community Services Recovery Fund** for Strategic and Communications Plans.
- \$14,995 to **Stonebridge Community Services** from the **Community Services Recovery Fund** for a Human Resources Consultation and Strategic Plan.
- \$3,500 to **United Way Oxford** from **Dennis & Joan Vollmershausen Family Fund** to support their annual campaign.
- \$39,250 to **Victim Assistance Services of Oxford** from the **Community Services Recovery Fund** for updates of website, policies, procedures, and by-laws.
- \$45,000 to **Women's Employment Resource Centre** from the **Community Services Recovery Fund** for a Community Needs Assessment and Strategic Plan.

ARTS CULTURE & HERITAGE

DRUMBO & DISTRICT HISTORICAL SOCIETY



The Drumbo & District Historical Society embarked on an exciting venture: crafting a virtual archive of Drumbo's rich history, seamlessly accessible from any corner of the globe through the PastPerfect Museum Software. \$2,700 from the **B & R George Cultural Fund** enabled them to successfully transfer their existing collection database to the new software, saving countless hours of manual data entry.

ZORRA CALEDONIAN SOCIETY



The Zorra Caledonian Society who have been host to Ontario's oldest Highland Games received a grant of \$20,000 from **Community Services Recovery Fund** for E-Commerce website and technology to support hybrid work.

WOODSTOCK MUSEUM NATIONAL HISTORIC SITE



\$500 from the **Ross & Fran McElroy Fund** was used for the Museum's "Christmas Home Tour — Historic Interpretation and Drama" project, which engaged grade 7/8 students in learning about local history through hands-on research and public speaking.



MORE ARTS, CULTURE & HERITAGE GRANTS:

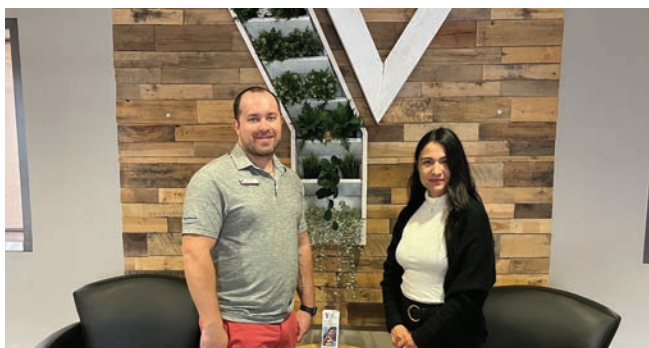
- \$14,650 to the **Ingersoll Creative Arts Centre** from **Community Services Recovery Fund** for a Community Awareness Campaign.
- \$21,500 to **K2K Productions** from the **Dennis & Joan Vollmershausen Family Fund**
- \$75,000 to the **Woodstock Little Theatre** from **Community Services Recovery Fund** for digital "no touch" signage and technology upgrade to facilitate remote work.

HEALTH & WELLNESS

UNITED WAY OXFORD

\$1,500 from the **Woodstock Chamber of Commerce Community Fund** and \$2,000 from the **Tyler Arts Legacy Fund** providing free safeTALK training for volunteers supporting youth. Participants learned how to reach out to someone thinking about suicide and help them keep safe by promptly connecting them to further support.

WOODSTOCK YMCA



With more than half of Y members facing financial barriers, grants of \$150 **Joland Family Fund**, \$655 from the **Ken & Lynda Whiteford Fund**, and \$2,523 from the **Canada Summer Games Fund** provides access to the Woodstock YMCA to 32 family members, giving them a chance to grow in self-esteem and resilience, connect with others, and improve their health and well-being — regardless of financial hardship. Additional grants of \$600 from **Alabastine Wilkinson Fund** in memory of **Jim Anderson** and \$500 From the **Norwich Fund** supported subsidized memberships for Norwich residents. Access to the YMCA means that all family members have a place to grow together, a space that promotes healthy living and encourages people to live their best lives. One Oxford County citizen described her experience: “The Y Financial subsidy program helped us when we needed it. I was starting a new job, and I needed assistance with childcare for my two kids. The YMCA day camps were fun, and my kids loved them. Best of all, funding helped us out, and we are grateful.”

ALZHEIMER SOCIETY SOUTHWESTERN PARTNERS



\$5,300 from the **Dennis & Joan Family Vollmershausen Fund** supported *The Social*, a program with individuals with early to mid-stage Alzheimer’s disease or other dementias. *The Social* offers an opportunity for weekly engagement, stimulation, and socialization for the attending client, while also offering care partner consistent weekly respite time. The group activities offered are focused on stimulating the six domains of well-being which include: cognitive, emotional, social, spiritual, vocational, and physical.

MORE HEALTH & WELLNESS GRANTS:

- \$1,300 from **Dennis & Joan Vollmershausen Family Fund** to **VON Sakura House**
- \$300 from **Builders Fund** to **ALS Society of Canada**

EDUCATION & STUDENTS AWARDS

UNITED WAY OXFORD

\$1,800 from **Lessif Family Fund** and \$500 from the **Dennis & Joan Vollmerhausen Family Fund** supported the Supplies4Students program which provides financial assistance to families in need. By giving each student a gift card to shop locally, the program is supporting individual students. In 2023, the program supported 647 families, which is equivalent to 1,316 students.

OXFORD MANUFACTURERS FOR SKILLS DEVELOPMENT BURSARY



The award honors students who excel in both technical and practical skills, particularly in mechanical or applied areas, while also demonstrating their commitment to their community and school through involvement and participation. **Samantha Deciantis** from St. Mary's Catholic High School and **Blake Manchester** from College Ave Secondary School were each awarded \$1,500.

JOLAND FAMILY FUND BURSARY



The bursary is designed to support a female student living on a working farm who is passionate about her work, demonstrates a strong motivation to succeed and is a positive influence on others. **Emily Lupton** from Huron Park Secondary School, received the \$220 award.

TYLER ARTS "ATHLETIC" SPIRIT AWARDS

Two Ingersoll District Collegiate Institute (IDCI) athletes, one male and one female, are awarded for their selfless play and leadership on and off the court, field, or rink. **Jayla Lamers** and **Adam Van Dyk** both receive \$500 for their achievements. Coaches commented about Adam: "He was our Tyler this year — always positive, always looking for a way to push through an adverse situation — no complaints — looking out for his team-mates — always bringing the team together. As a more inexperienced player new to a sport, he was always positive, willing to be the guy to grab equipment, carry a bag or cooler" because he has truly embraced the value of being a team and he knows the little things matter."

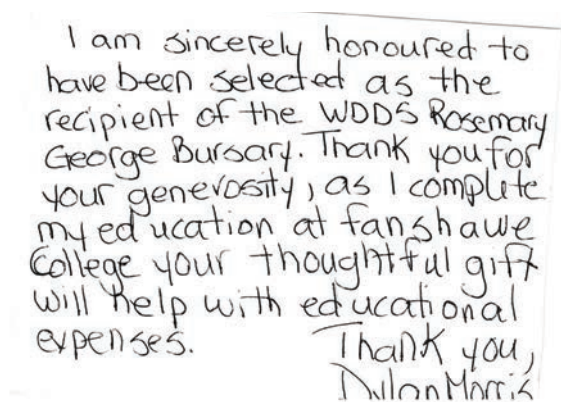
PAT & BARRY SMITH BURSARY

Jaelyn Fleet from Glendale High School and **Sophia Vivieros** from St. Mary's Catholic High School received a bursary of \$1,000 each recognizing them for their leadership skills and community involvement.

LORNA & GEORGE ROBERTS BURSARY

Each year a bursary is awarded to a student who excels in leadership skills and who is furthering their education at either the Ontario Agricultural College at the University of Guelph and/or Department of Family Relations and Applied Nutrition in the College of Social & Applied Human Sciences at the University of Guelph. **Samantha DeBruyn** from St. Mary's Catholic High School is pursuing her BScn. Agriculture at University of Guelph and received a \$1,800 bursary.

WDDS ROSEMARY GEORGE BURSARY



I am sincerely honoured to have been selected as the recipient of the WDDS Rosemary George Bursary. Thank you for your generosity, as I complete my education at Fanshawe College your thoughtful gift will help with educational expenses. Thank you, Dylan Morris

Dylan Morris from St. Mary's received a bursary of \$500, an award presented to a student enrolled into the Developmental Services Worker program (DSW) who is recognized for their potential and for their contribution to services for people with developmental disabilities. Dylan has a long history of volunteerism with students with special needs.

THE HAWKINS MEMORIAL FUND

This fund was established in memory of a beloved family, lost to carbon monoxide poisoning, who was "always ready, willing, and able to help those in need and could often be found volunteering with big, welcoming grins on their faces". Three students are recognized each year for their community involvement, respect for others and moral courage. **Matthew Molnar** from IDCI awarded \$250 from the Laurie Hawkins Memorial Award. **Olivia Commisso** from St. Mary's Catholic High School awarded \$250 from the Cassandra Hawkins Memorial Award and **Matthew Polidori** from St. Michael's Catholic School awarded \$50 from the Jordan Hawkins Memorial Award.

CHILDREN'S AID SOCIETY OXFORD AGENCY ENDOWED FUND

Each year bursaries from the Fund help kids in care pursue their post-secondary education. In 2023, six students were awarded bursaries of \$2,000 each. An additional \$5,000 was used for CAS tutoring program to supply books, workbooks and supplies.

MORE EDUCATION GRANTS:

- \$100 from **Joland Family Fund** to **Grand Erie District School Board** to help maintain archives.
- \$2,500 from **Dennis & Joan Vollmershausen Family Fund** to **English Language in China, Canada**.
- \$5,000 from **William & Mary Mackesy Community Fund** to **Strong Start** for their Letters, Sounds and Words program.
- \$1,200 from **Dennis & Joan Vollmershausen Family Fund** to **Thames Valley Education Foundation** for W.A. Magill Scholarship
- \$1,000 from **Ken & Lynda Whiteford Fund** to **Woodstock Public Library** for STEAM Device collection supporting library programming and learning that highlights Science, Tech, Engineering, Arts & Math.

ENVIRONMENT

NAVY LEAGUE WOODSTOCK



The Navy League Woodstock provides young individuals with a unique opportunity to develop valuable skills that prepare them for adulthood. Through their training, they learn important values such as teamwork, problem-solving, and effective communication, which are essential for success in their personal and professional lives. Grants of \$1,000 from **Stevens Fund** and \$300 from the **Oxford Environmental Fund** were instrumental in replacing two boats that are critical to their programs, enabling them to continue providing a safe and effective environment for the kids to learn and grow.



UPPER THAMES RIVER CONSERVATION AUTHORITY



Nestled in Thamesford, the Lions River Park stands as a testament to conservation efforts and community engagement. Thanks to a generous \$2,000 grant from the **Stevens Fund**, the park now had two stairs made of stone steps that offer free and safe access to the Thames River. This initiative enhances outdoor recreation in the area, especially for fishing enthusiasts while maintaining its natural beauty.



SPORTS & RECREATION

ZORRA TOWNSHIP



Thanks to a grant of \$2,143 from the **Thamesford Lawn Bowling Club Fund**, Zorra Township welcomed over 2,000 residents to their free public skating during the 2024-2025 season. Not all families can afford these sports and this grant helped make skating accessible and helped foster a sense of community and belonging.

STEM CAMP

\$14,475 from the **Community Services Recovery Fund** is helping to fund a recruitment website for STEM Camp which inspires youth through participation in hands-on activities in the areas of science, technology, engineering, and mathematics.

WOODSTOCK MINOR HOCKEY LEAGUE

With \$500 from the **Dennis & Joan Vollmershausen Family Fund** and \$450 from the **Hawkins Family Memorial Fund**, the Woodstock Minor Hockey League was able to purchase youth hockey helmets and cages. These helmets are used as part of a "Just Try It" program. The League provides the necessary equipment for the kids to try the game of hockey free of charge. Those kids who end up registering to play minor hockey for the following season are then given the equipment, free of charge, to keep.

GRANTS IN OTHER CATEGORIES

- \$390 from **Dr. Patricia Brown Memorial Fund** to **Knox Presbyterian Church**
- \$100 from **Joland Family Fund** to **Lyndoch Evergreen Cemetery**
- \$5,000 from **Thamesford Lawn Bowling Club Fund** to **Thamesford Lions Club**
- \$20,000 from **Dennis & Joan Vollmershausen Family Fund** to **Innerkip Presbyterian Church**
- \$200 from **Dennis & Joan Vollmershausen Family Fund** to **Youth for Christ**
- \$200 from **Dennis & Joan Vollmershausen Family Fund** to **Youth Unlimited YFC Woodstock**
- \$500 to **College Avenue United Church** from **Dennis & Joan Vollmershausen Family Fund**.

THE HEROES AMONG US

The Heroes Among Us Fund was established in 2019. It was inspired by the thousands of selfless, caring actions carried out every day by ordinary people making Oxford a better place.

Make a donation and nominate your hero. Our unsung heroes will live on forever through ongoing annual community grants from the Heroes Among Us Fund.

WE REMEMBER OUR HEROES:

Jeff Brooks for being a loyal, supportive friend and mentor

Teun DeBeer for never giving up and his passionate for the dairy industry

Eleanor Elliott for being a kind and caring neighbour and friend

Dale Fanset for smiling and laughing often, for spreading comfort and joy

Sam Horton for being an inspiration and an instigator of good things

Deb Landon for unconditionally sharing her caring heart and great warm smile

Jean Elizabeth Matheson for her positive attitude and being an inspiration

Janet Mazerolle for helping so many find joy and possibility in our lives

Robert M. Matheson for his generosity to community and family

Claude Normandeau for his devotion to his beloved family and city of Montreal

Eleanore Wardrop for her kindness, positivity and amazing raspberry tarts

Steve Zehr for living the philosophy of "Kindness always wins"

WE ARE PROUD TO SHARE THE STORY OF OUR NEWEST HEROES:



LARRY BALKWILL

Larry, a lifelong resident of Oxford County, dedicated his career to serving its agriculture industry. His community spirit shines through his 50-year tenure as a Past President and member of the Drumbo Lion's Club. For over three decades, he has entertained at church and community events, lending his voice to Barbershop Quartets and the Drumbo Men's Choir, where he currently serves as Director. Larry's enduring commitment paints him as a true hero, leaving a lasting impact on Oxford.



KAREN SAMPLE

Karen is a community-minded individual and resides north of Embro. She has been a valued member of the board and as a volunteer with Oxford Community Foundation. She not only conceived but also funded the Hero's Among Us Fund, reflecting her visionary spirit and commitment to making a difference in the lives around her.



WANT TO NOMINATE A HERO?

Contact us or go to our website to find out how.

info@oxfordcommunityfoundation.org or 226-667-6404

2023 OXFORD COUNTY WARDEN'S CHARITY GOLF TOURNAMENT

THANK YOU FOR SUPPORTING OXFORD COMMUNITY FOUNDATION AT THE 2023 OXFORD COUNTY WARDEN'S CHARITY GOLF TOURNAMENT HELD AT INGERSOLL GOLF COURSE.



Without tournament sponsors, golfers and generous contributors, the Foundation would not be able to accomplish everything that we do. The tournament is our major fundraiser and you helped raise over **\$35,000** to support OCF operations. These funds help make it possible for us to distribute grants, for all the initiatives you are reading about in this report. You help us keep money in Oxford and you help us bring new money to Oxford. You help make Oxford a better place for all, now and forever.

Immense gratitude to all sponsors. Your support and that of the many volunteers who helped make this day a success is sincerely appreciated. Major sponsors are shown below.



CREATE YOUR LEGACY FUND

At Oxford Community Foundation (OCF), we often meet with people who have questions about how they can leave a lasting gift to their community. What do I want my legacy to be? How can I make a difference in my community? How can I make sure that the charity I care about receives ongoing support? As individuals and families pose these questions, many times there is a shared sentiment — the desire to give back to the community that has given them so much.

Through fund options listed below, OCF helps people leave a personalized legacy in Oxford County, to make it a better place. Funds can be permanently endowed or designed for immediate or specific time period impact. The Foundation will assist you in creating a fund that meets your timelines and provides you with your desired degree of impact and involvement.

NEW FUND

In 2023, we were honoured to support the **Woodstock Chamber of Commerce** in establishing a community fund from money accumulated over time through the hard work of their Board and General Manager, careful fiscal management, volunteer event support and a recovery of funds. The Chamber Board felt strongly that these funds should be used for ongoing and long-term community support. Grants from the **Woodstock Chamber of Commerce Community Fund** will support one or more of four community building pillars:

1. education for small business, will directly impact the ability of small businesses to grow and learn new business skills,

2. mental health supports or workshops, will help both businesses and our greater community,
3. creation or enhancement of public spaces, will reinforce the pride our community takes in Woodstock, or
4. support a broad range of initiatives that build a stronger Woodstock community.

REMEMBERING A FUNDHOLDER



On May 7, 2023, in her 84th year, Lorna Roberts (nee Thompson) passed away peacefully. Lorna radiated joy with her infectious smile, embodying positivity and unwavering support for others. Family meant the world to her, and she delighted in discussing her children and grandchildren, her face glowed with pride. She had a quiet and clever way of letting her husband George know when she thought he was embellishing a story. In 2013, George & Lorna Roberts established a fund with Oxford Community Foundation. Lorna's legacy will be remembered each year with a bursary of \$2,000 awarded to an Oxford County student exploring post secondary education at the University of Guelph in either agriculture or family and social studies.

FUNDS OPTIONS & EXISTING FUNDS

We are truly inspired to have so many forward-thinking and generous donors and fundholders each of whom is building a stronger, more resilient community for everyone, today and always.

COMMUNITY FUNDS are a flexible way to support ever changing community needs. You leave it up to us and our grants committee to ensure the community's most pressing needs are supported. We fund all aspects of community well-being — arts and culture, education, the environment, health and wellness, heritage, recreation, and social services — trust the Foundation to find the groups that need money the most.

- Founders' Circle Fund
- Builders' Circle Fund
- Alabastine-Wilkinson Family Fund
- Dolson Family Fund
- Doug & Yvonne Eckel Fund
- Henning Hansen Memorial Fund
- The Heroes Among Us Fund
- Jean Matheson Heroes Fund
- Norwich Township Community Fund
- Oxford County Youth Fund
- Donald Post Fund
- Woodstock Chamber of Commerce Community Fund

FIELD OF INTEREST FUND. On your behalf, our grants committee will target gifts to address a community issue in an area important to you.

- Tyler Arts Legacy Fund
- Hawkins Family Memorial Fund
- Klosler Family Fund
- Oxford Environmental Fund
- Oxford Manufacturers Skill Development Fund
- George & Lorna Roberts Fund
- Pat & Barry Smith Fund
- WDDS Rosemary George Fund

DONOR ADVISED FUNDS function like a private foundation, allowing donors to be involved in identifying charities and initiatives to support each year.

- B&R George Cultural Fund
- Lessif Family Fund
- William & Mary Mackesy Community Fund
- Stevens Fund
- Ken & Lynda Whiteford Fund
- Dennis & Joan Vollmershausen Family Fund

DONOR DESIGNATED FUNDS allow you to select your favourite charities, and we ensure they are supported not just once, but every year.

- Dr. I. Patricia Brown Fund
- Ross & Fran McElroy Fund
- Oxford County Library Fund
- Frank & Marion Smith Fund

FLEX FUNDS offers you the flexibility to meet your unique needs by combining one or more interests and fund types.

- Joland Family Fund
- Thamesford Lawn Bowling Legacy Fund

AGENCY FUNDS allows registered charities to building a sustainable source of funding for their organization. Anyone can contribute to an agency fund today or through a bequest in their will, allowing the organizations to concentrate on their community mission knowing that funding is available each year.

- Children's Aid Society Oxford Endowment Fund
- Operation Sharing Endowment Fund

LEAVING A GIFT IN YOUR WILL allows you to support your favourite causes even after you are gone. Including a charitable bequest in your will or through an life insurance policy is a simple way to make a lasting gift that will live on in your community.

*Think about the legacy you would like to leave and contact me to explore your options.
Louise Wardrop, Executive Director lwardrop@oxfordcommunityfoundation.org or 226-667-6404*

2023 FINANCIAL & INVESTMENT HIGHLIGHTS

WE ARE COMMITTED TO TRANSPARENCY AND ACCOUNTABILITY.

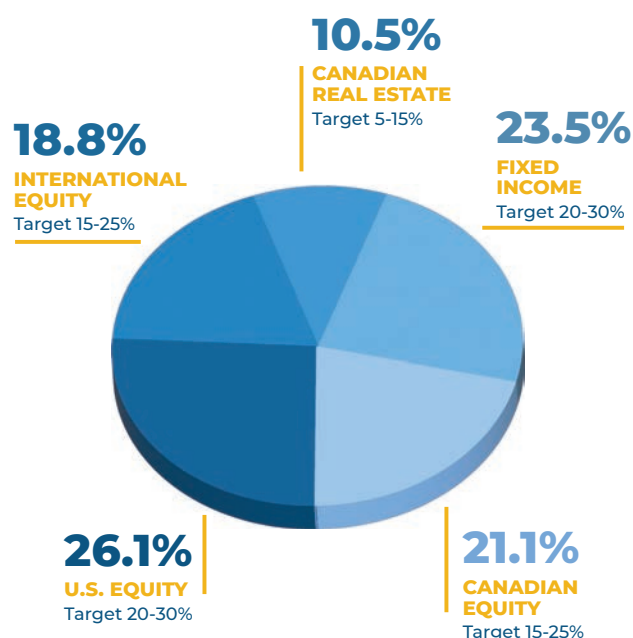
We publish audited financial statements and solicit feedback regularly on our work from our donors and community partners. Our financial statements were prepared by MW&CO. Copies are available by contacting the office at info@oxfordcommunityfoundation.org or 226-667-6404.

Our stakeholders can depend on us to be professional stewards of gifts received. Donor gifts are pooled and investment management is provided by the London Community Foundation. This arrangement helps us maximize growth and minimize costs. The relationship is re-evaluated annually by OCF's Finance and Investment Committee.

The Foundation's investment program is focused on generating returns that allow OCF to meet granting objectives, recover operating costs, protect the purchasing power of the capital, and establish a reserve to protect against potential market declines.

ASSET ALLOCATION OF THE INVESTMENT FUND

OCF is a long-term investor and believes the asset mix, ensures we can continue to impact our community in a positive and meaningful way.



TOTAL AMOUNT GRANTED IN 2023: \$546,524

SUMMARY OF STATEMENT OF OPERATIONS AND FUND BALANCES

Year Ended December 31, 2023

OCF continues to be focused on sound management and strong governance. Operating costs as a percentage of average asset value has been commonly used by community foundations as an indicator of efficiency. In 2023, staff expenses were temporarily increased to support the distribution of the \$392,000 Government of Canada's Community Service Recovery Fund program. An honorarium of \$44,000 was received to manage the program. OCF continues to meet the benchmark for foundations of similar asset size.

	2023	2022
TOTAL ASSETS	\$2,921,196	\$2,373,486
Operating Expense as % of Total Assets	5.6%	5.1%
Investment Returns Net of Fees	9.8%	- 5.8%
Donations and Fundraising	\$572,786	\$349,513
FUND BALANCES		
Endowed funds (community, individual, agency)	\$2,483,808	\$1,983,817
Spend down funds (community, individual)	\$125,926	\$105,532
Operating Funds (Founders & Builders)	\$178,679	\$153,327
Funds held on behalf of other parties	\$30,452	\$28,246
TOTAL FUND BALANCE	\$2,818,866	\$2,270,922
GRANTS & DISBURSEMENTS		
OCF Funds — Keeping Money in Oxford	\$128,404	\$115,693
Partnership Funds — Bringing Money to Oxford	\$418,120	\$30,135
TOTAL GRANTS	\$546,524	\$145,828

RECONGIZING OUR BUILDERS AND FOUNDERS

Each of our Founders and Builders, listed below, initially pledged \$2,000 to help cover operating costs. They provided us with the stability from which to grow.

Over time, several of our Founders and Builders established their own funds, amplifying their legacy and positive impacts in our community. They are listed separately in the first column.

FOUNDING & BUILDING MEMBERS WHO ALSO CREATED ENDOWMENT FUNDS

(year established)

Alabastine-Wilkinson Family Fund (2005)

Douglas & Yvonne Eckel Fund (2006)

B&R George Cultural Fund (2006)

Joland Family Fund (2006)

Lessif Family Fund (2007)

Pat & Barry Smith Fund (2007)

Ken & Lynda Whiteford Fund (2007)

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