



# Making Futures Brighter for Today & Tomorrow

**2021-2022** | **YEAR IN REVIEW**  
ANNUAL REPORT



**BURLINGTON**  
FOUNDATION  
Give brilliantly™



# A Notable Year of **Growing Legacies for Community**

For an organization, a year in many respects is a point in time between the past and the future. It is an opportunity to pause, reflect and look ahead.

This past year we continued to navigate change, strengthening our commitment to the people and the community that we serve. Our ability to support so many worthy and deserving local causes and charitable projects is due to the tremendous giving of our fundholders and donors.

Their support, partnership and generosity enabled the Foundation to provide \$1,100,838 across 88 charities that provide essential programs and services to our most vulnerable community members. This year, the Foundation experienced unprecedented asset growth. Working with new and existing fundholders, the Foundation received over \$4,532,149 in new assets.

We extend our heartfelt thanks to the GWD Foundation for Kids for entrusting us to continue their legacy of supporting children and youth in our community by providing Burlington Foundation with a \$3.42-million gift, the single largest gift to-date since our inception in 1999.

As we look ahead to the new operating year, we are excited to seize the future with intent. This means that the Foundation will be intentional about our work, deliberate in the way we utilize resources, and committed to supporting a just, equitable and resilient community.

In spite of ongoing adversity, it has been a remarkable year for Burlington Foundation. Thank you for your passion and dedication to the Foundation and to the community that we all call home.



**Matt Afinec**  
Board Chair

**Colleen Mulholland**  
President & CEO



# Our Team of Experienced Leaders Committed to Community

## Burlington Foundation Board of Directors 2021-2022

**Matt Afinec, Chair**

President & COO,  
Business Operations,  
Hamilton Tiger-Cats Football Club,  
and Forge FC Hamilton Soccer Club

**Catherine Brady, Vice Chair**

Retired Business Leader;  
Community Advocate

**Ron Foxcroft**

Chairman and CEO,  
Fox40 International and  
Fluke Transportation Group

**Tim Hogarth**

President & CEO,  
The Pioneer Group Inc.

**Kevin Brady**

Director, Advica Health;  
Director Corporate Health,  
NFP Canada

**John Rockx, Treasurer**

Partner, KPMG LLP

**Tim Cestnick  
Chair, Investment Committee**

Co-Founder and CEO,  
Our Family Office Inc.

**Catherine Olsiak**

Partner, SimpsonWigle Law LLP



## Investment Committee 2021-2022

**Tim Cestnick, Chair**

Foundation  
Board Member;  
Co-Founder and CEO,  
Our Family Office Inc.

**Tim Hogarth**

Foundation  
Board Member;  
President & CEO,  
The Pioneer Group Inc.

**Dom Marinic**

Director,  
Investments  
The Pioneer Group Inc.

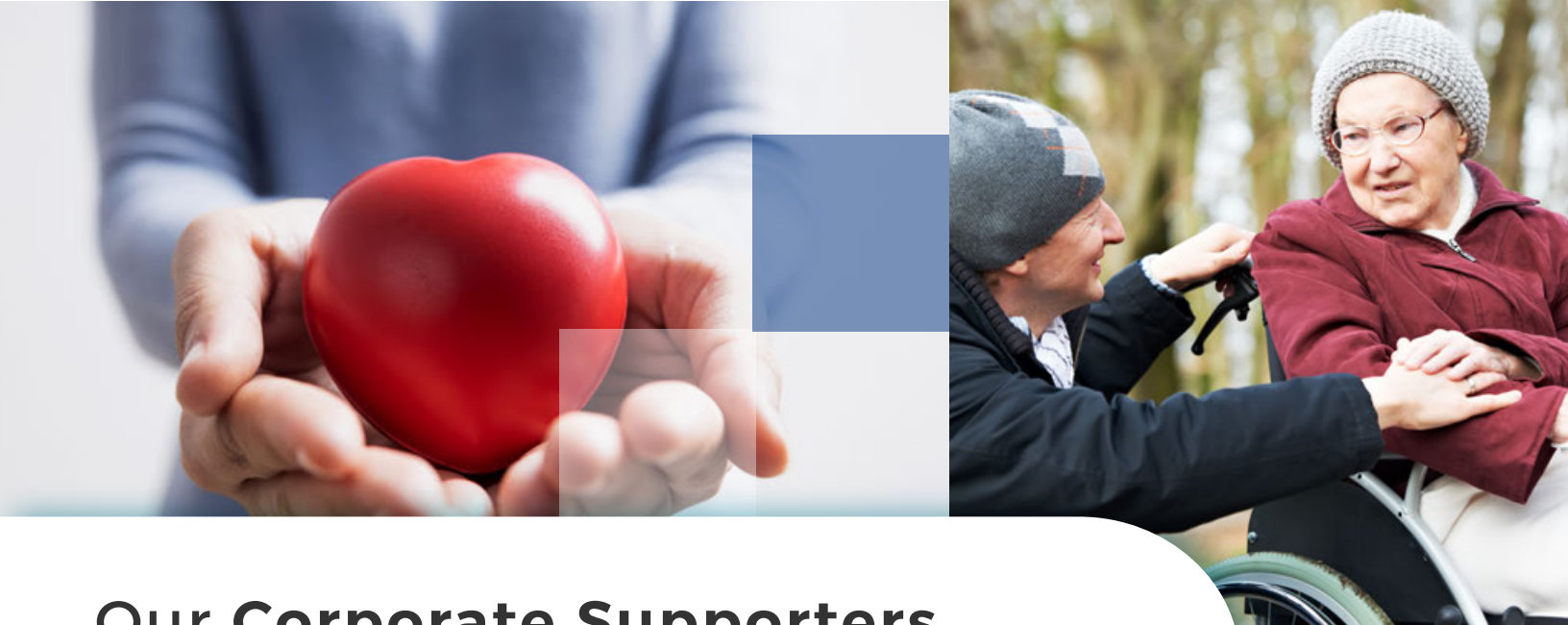
**Phil Reddon**

Managing Partner,  
Covington Capital Corp.

**Lisa Ritchie**

Vice President,  
Burgundy Asset  
Management





# Our Corporate Supporters Help Us Make Burlington Better

## Corporate Supporters 2021-2022

As our Burlington community continued to work together this year to both address immediate challenges and help support charitable partners in need, having the unwavering support of our corporate partners' giving has enabled us

to stay focused on our charitable mission. We are so grateful for our partners' commitment to the Foundation and our community over the 2021-2022 year.





Give brilliantly™



## Strengthening Community for Years to Come Through Major Gifts

Burlington Foundation exists to serve community, and only through the gifts of our passionate and caring donors can we fulfill our work. 2021-2022 was in fact an unprecedented year of giving at the Foundation as donors chose to grow

their commitment to our local community through the Foundation. We are honoured to share that through these donor gifts our Assets Under Management grew to \$23,651,060.

### The GWD Foundation for Kids Gifts \$3.42-million to Burlington Foundation

Burlington Foundation and The GWD Foundation for Kids jointly announced in January 2022 that Burlington Foundation is the recipient of a \$3.42-million major gift. This gift will continue the legacy established by The GWD Foundation for Kids in 2001 of supporting the education, health, development and betterment of challenged children, youth, and their families.

To read more about this landmark gift, the largest in Burlington Foundation history, click [here](#) to visit our website.



### CLV Group/InterRent REIT Establishes Philanthropic Fund at Burlington Foundation with \$175,000 Opening Gift

"Through our partnership with Burlington Foundation we know that our financial gifts are in excellent stewardship hands, and the donations that we provide to local charities will have the greatest impact on the lives of so many" says Mike McGahan, President of CLV Group Inc and CEO of InterRent REIT. Click to [learn more](#).

## Granting to Community

**\$1,100,838.81**

Total Charitable Grants  
Awarded in 2021-2022

**88**

Charitable  
Organizations  
Supported in  
2021-2022

**\$9,257,511.66**

Total Grants Awarded  
Since Burlington Foundation  
Inception in 1999





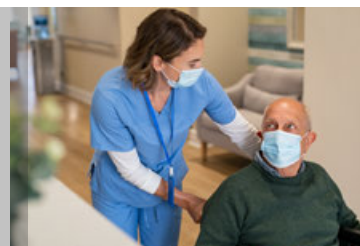
## List of Grants 2021-2022

With the second year of the Covid-19 pandemic bringing further change and often challenge to community, we were proud to come together with fundholders, donors, charitable partners and corporate supporters to make the greatest impact in community through Foundation grantmaking. Addressing critical community needs as well as the wishes

of our fundholders, the Foundation was proud to grant over \$1,100,838 in 2021-2022. Through the generosity and passion of our donors, this granting supports 88 charities, making a meaningful impact across a wide spectrum of organizations. We give our heartfelt thanks to our donors for enabling the following grants to be made possible.

<b>Acclaim Health</b>	<b>\$6,000.00</b>
<b>Alzheimer Society of Canada</b>	<b>\$3,000.00</b>
<b>Art Gallery of Burlington</b>	<b>\$34,750.00</b>
<b>ArtHouse</b>	<b>\$10,684.06</b>

<b>Brott Music Festival</b>	<b>\$7,000.00</b>
<b>Burlington Community Foundation</b> (Grant gifts from fundholders)	<b>\$40,000.00</b>
<b>Burlington Humane Society</b>	<b>\$2,443.69</b>
<b>Burlington Museums Foundation</b>	<b>\$26,605.49</b>

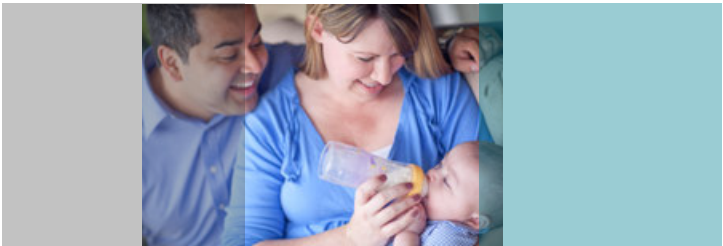






<b>Burlington New Millennium Orchestra</b>	<b>\$3,250.00</b>
<b>Burlington Performing Arts Centre</b>	<b>\$1,799.24</b>
<b>Burlington Public Library</b>	<b>\$73,820.59</b>
<b>Burlington Symphony Orchestra</b>	<b>\$12,500.00</b>
<b>Burlington Teen Tour Band Boosters Inc.</b>	<b>\$31,573.14</b>

<b>BurlingtonGreen Environmental Association</b>	<b>\$5,000.00</b>
<b>Camelot Centre</b>	<b>\$1,500.00</b>
<b>Canadian Cancer Society</b>	<b>\$2,500.00</b>
<b>Canadian Red Cross</b>	<b>\$20,924.47</b>
<b>Carpenter Hospice</b>	<b>\$258,177.40</b>



<b>City of Burlington</b>	<b>\$24,287.00</b>
<b>CNIB</b>	<b>\$20,000.00</b>
<b>Community Living Burlington</b>	<b>\$23,498.42</b>
<b>Community Youth Programs Incorporated</b>	<b>\$1,500.00</b>
<b>Compassion Society of Halton</b>	<b>\$5,000.00</b>
<b>Conservation Halton Foundation</b>	<b>\$906.08</b>
<b>Darling Home for Kids</b>	<b>\$5,000.00</b>
<b>Diabetes Canada</b>	<b>\$2,500.00</b>





<b>Dorothy Ley Hospice</b>	<b>\$1,361.66</b>
<b>Dundas Valley School of Art</b>	<b>\$5,500.00</b>
<b>Eva Rothwell Centre</b>	<b>\$1,000.00</b>
<b>Fanshawe College</b>	<b>\$804.87</b>
<b>Food for Life</b>	<b>\$3,000.00</b>
<b>Food4Kids Halton</b>	<b>\$6,892.06</b>
<b>Fora: Network for Change</b>	<b>\$1,000.00</b>
<b>Forestview Bible Church</b>	<b>\$5,000.00</b>
<b>George Brown College</b>	<b>\$1,000.00</b>
<b>GiftFunds Canada</b>	<b>\$2,500.00</b>
<b>Halton Food for Thought</b>	<b>\$5,000.00</b>
<b>Halton Islamic Association</b>	<b>\$8,500.00</b>
<b>Halton Learning Foundation</b>	<b>\$4,268.55</b>

<b>Halton Women's Place</b>	<b>\$18,924.84</b>
<b>Hamilton Philharmonic Orchestra</b>	<b>\$10,000.00</b>



<b>Harbourfront Gives Foundation</b>	<b>\$5,000.00</b>
<b>HCA Dance Theatre</b>	<b>\$5,000.00</b>
<b>Humber College</b>	<b>\$1,000.00</b>
<b>Huron University College</b>	<b>\$1,000.00</b>
<b>Joseph Brant Hospital Foundation</b>	<b>\$36,000.00</b>
<b>Junior League of Hamilton-Burlington Inc.</b>	<b>\$9,849.45</b>





<b>KBF Foundation Canada</b>	<b>\$700.00</b>
<b>Lakeside Hope House</b>	<b>\$1,000.00</b>
<b>Learning Disabilities Association</b>	<b>\$4,580.00</b>
<b>Liberty for Youth</b>	<b>\$6,000.00</b>
<b>Lighthouse Program for Grieving Children</b>	<b>\$2,000.00</b>

<b>Ontario SPCA</b>	<b>\$500.00</b>
<b>Ontario Medical Foundation</b>	<b>\$1,925.70</b>
<b>Partnership West Family Support Network (Burlington Food Bank)</b>	<b>\$1,500.00</b>
<b>Reach Out Centre for Kids</b>	<b>\$6,000.00</b>
<b>Rotary Foundation Canada</b>	<b>\$1,200.00</b>



<b>Royal Botanical Gardens</b>	<b>\$85,000.00</b>
<b>Ryerson University</b>	<b>\$1,000.00</b>
<b>Salvation Army Burlington Family Services</b>	<b>\$8,500.00</b>

<b>McMaster University</b>	<b>\$15,000.00</b>
<b>MLSE Foundation</b>	<b>\$5,000.00</b>
<b>Mohawk College</b>	<b>\$6,000.00</b>
<b>Multiple Sclerosis Society of Canada</b>	<b>\$1,943.69</b>
<b>Niagara College of Applied Arts &amp; Technology</b>	<b>\$3,603.21</b>

<b>SAVIS of Halton (Sexual Assault &amp; Violence Intervention Services)</b>	<b>\$1,602.65</b>
<b>Shifra Homes Inc.</b>	<b>\$3,184.06</b>
<b>Society of Saint Vincent de Paul</b>	<b>\$5,864.32</b>
<b>Southern Ontario Lyric Opera</b>	<b>\$10,000.00</b>
<b>Speroway</b>	<b>\$500.00</b>

<b>St. Christopher's Church</b>	<b>\$2,500.00</b>
<b>Sunrise Therapeutic Riding</b>	<b>\$4,000.00</b>
<b>Tetra Society of North America</b>	<b>\$2,640.00</b>
<b>The Bruce Trail Conservancy</b>	<b>\$20,000.00</b>
<b>The Colin B Glassco Charitable Foundation</b>	<b>\$40,000.00</b>
<b>The Parish Church of St. Luke</b>	<b>\$19,000.00</b>
<b>The Women's Centre of Halton</b>	<b>\$5,000.00</b>
<b>Tottering Biped Theatre</b>	<b>\$8,184.06</b>
<b>UNICEF Canada</b>	<b>\$3,000.00</b>
<b>United Way Halton &amp; Hamilton</b>	<b>\$22,298.37</b>
<b>University of Guelph</b>	<b>\$3,000.00</b>
<b>University of Ottawa</b>	<b>\$3,314.34</b>
<b>University of Waterloo</b>	<b>\$5,000.00</b>



<b>University of Western Ontario</b>	<b>\$2,804.88</b>
<b>Wellington Square United Church</b>	<b>\$5,000.00</b>
<b>Wilfred Laurier University</b>	<b>\$10,875.17</b>
<b>YMCA Hamilton Burlington Brantford</b>	<b>\$6,000.00</b>
<b>YWCA of Hamilton/Burlington</b>	<b>\$8,797.35</b>

<b>TOTAL GRANTS 2021-2022</b>	<b>\$1,100,838.81</b>
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## **Growing Legacies of Support for Community**

**113**

**Number of  
Funds  
Managed**

**\$23,651,060**

**in Assets  
Under Management**





# Thank You to our Fundholders for Your Commitment to Community

**Burlington Foundation fundholders have been making important change happen in our community since 1999.**

By establishing a fund with the Foundation, our individual, family, corporate or agency fundholders demonstrate their

passion for bettering community and value making the biggest difference possible. In 2021-2022, thanks to both new and longstanding fundholders, we're proud to partner with our fundholders in stewarding 113 funds, totalling \$23,651,060 in assets.

## Funds Held at Burlington Foundation

Aldershot School Fund  
Basadur Family Foundation Fund  
BDO Burlington Community Fund (Endowed and Term)  
Beatrice McDonough Family Foundation Fund  
Bette and Keith Munro Foundation Fund  
Beverley and Walter Mulkewich  
Community Development Fund  
Breachin Huffman and Henderson Fund  
Burlington Chamber of Commerce Scholarship Fund  
Burlington Community Foundation Impact Fund  
Burlington Community Fund  
Named Funds within Burlington Community Fund:  
    Hamilton Family Fund  
    Hogarth Family Foundation Fund  
    Mayor's Gala Fund  
    Mayor's Green Fund  
    Performing Arts Burlington Fund  
    Plains Road Village Vision Fund

Burlington Community Youth Advancement Fund  
Burlington Economic Development Corporation  
Mayor's Apprenticeship Fund  
Burlington Medical Society Scholarship Fund  
CLV Group/InterRent Trust Philanthropy Fund  
Crawford Lake Fund  
Creative Results for Kidz Endowment Fund  
Dalton Timmis Group Fund  
Dan Lawrie Family Foundation Fund  
(Endowed and Term)  
danceScape Endowment Fund  
David Bruce Sergeant Fund  
DeWitte Family Fund  
Donnell Insurance Foundation Fund  
Dr. John and Jennifer Bozek Family Fund  
Erica and Pat Smith Fund  
Ethel and Roly Bird Fund  
Eva and Lloyd Utter Memorial Fund

Fontaine Family Fund (Endowed and Term)  
 Foxcroft Family Fund  
 Frank Allison Foundation Fund in Loving Memory  
 of his Mother, Olga Allison  
 Friends of Heritage Burlington Fund  
 (Endowed and Term)  
 Gurplean and Marianne Singh-Waraich Fund  
 H. Fred Janson Fund for the Developmentally  
 Handicapped  
 Haggerty/Durocher Fund  
 Halton Heroes Fund (Endowed and Term)  
 Healthy Reflections Fund (Endowed and Term)  
 Helen Zdriluk Memorial Fund for the Performing Arts  
 (Endowed and Term)  
 James Paton Heron Fund  
 Jean Ellen Griffin Fund  
 Joyce Cooper Foundation Fund  
 Kempe Family Fund  
 Kimberley Kovalchek Legacy Fund  
 Lawrence Sinclair Scholarship Fund  
 Leggat Family Fund  
 LKH Legacy Fund  
 LKH Spirit Fund  
 Louise Cooke Fund for the Visual and Performing Arts  
 Mario Rende Scholarship Fund  
 Marsh Family Fund  
 Matthew C. Daly Scholarship Fund  
 M.E. Devitt Term Fund  
 Mental Wellness Endowment Fund  
 Milne Family Foundation Fund (Endowed and Term)  
 Nelson and Gary Allan Fund  
 Nicholas Hurlbut Memorial Fund  
 Now I Can Children's Fund  
 Ontario Endowment for Children and Youth  
 in Recreation Fund  
 Pasquale (Pat) and Anita Paletta Foundation Fund  
 Paul Hansell Foundation Fund  
 Performing Arts Youth Endowment Fund  
 Pieczonka Family Foundation Fund  
 Pioneer Group Term Fund  
 Ralph and Susan Sgro Family Fund  
 Randy and Denise Reeve Family Fund  
 (Endowed and Term)  
 Reddon Family Fund  
 Robert D. Gould Foundation Fund  
 Robert West Fund

Ruth Milne Fund (Endowed and Term)  
 Sarah and Donald Munro Memorial Fund  
 SB Partners Scholarship Fund  
 Smiling Hearts Foundation Fund  
 (Endowed and Term)  
 Smith Family Fund  
 Sydney Robis Memorial Fund  
 Uffelmann Family Foundation Fund  
 Valley Fund  
 Vaski Family Performing Arts Fund  
 Wealthbuilding Foundation Fund  
 Weatherdon Fund for Early and Lifelong Nutrition  
 Wills Memorial Fund

### **Agency Funds:**

Burlington Food Bank Fund  
 Burlington Public Library Family of Funds:  
     Burlington Public Library Permanent  
     Endowment Fund  
     Mae Beatrice Broadbent Fund  
     Margaret Clay Fund  
     Millicent McEwen Fund  
     Wendy Schick Fund

Burlington Teen Tour Band Boosters Inc. Fund  
 Carpenter Hospice Family of Funds:  
     Carpenter Hospice Endowment Fund  
     Walter and Louise White Fund

Community Living Burlington Fund  
 Conservation Halton Foundation Green Values Fund  
 Halton Women's Place Fund  
 Junior League of Hamilton-Burlington Fund  
 United Way Halton & Hamilton Campaign Fund  
 United Way Halton & Hamilton  
 Tomorrow and Forever Fund

### **Funds Held on Behalf of Others:**

Art Gallery of Burlington Fund  
 Burlington Museums Foundation Fund  
 Conservation Halton Foundation Fund



## Burlington Foundation Audited Financial Statements Available at:

<https://burlingtonfoundation.org/about/year-in-review-annual-report-financial-statements/>

Charitable number: 857812739 RR 0001

**burlingtonfoundation.org**



@BurlingtonFDN



@BurlingtonFoundation



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