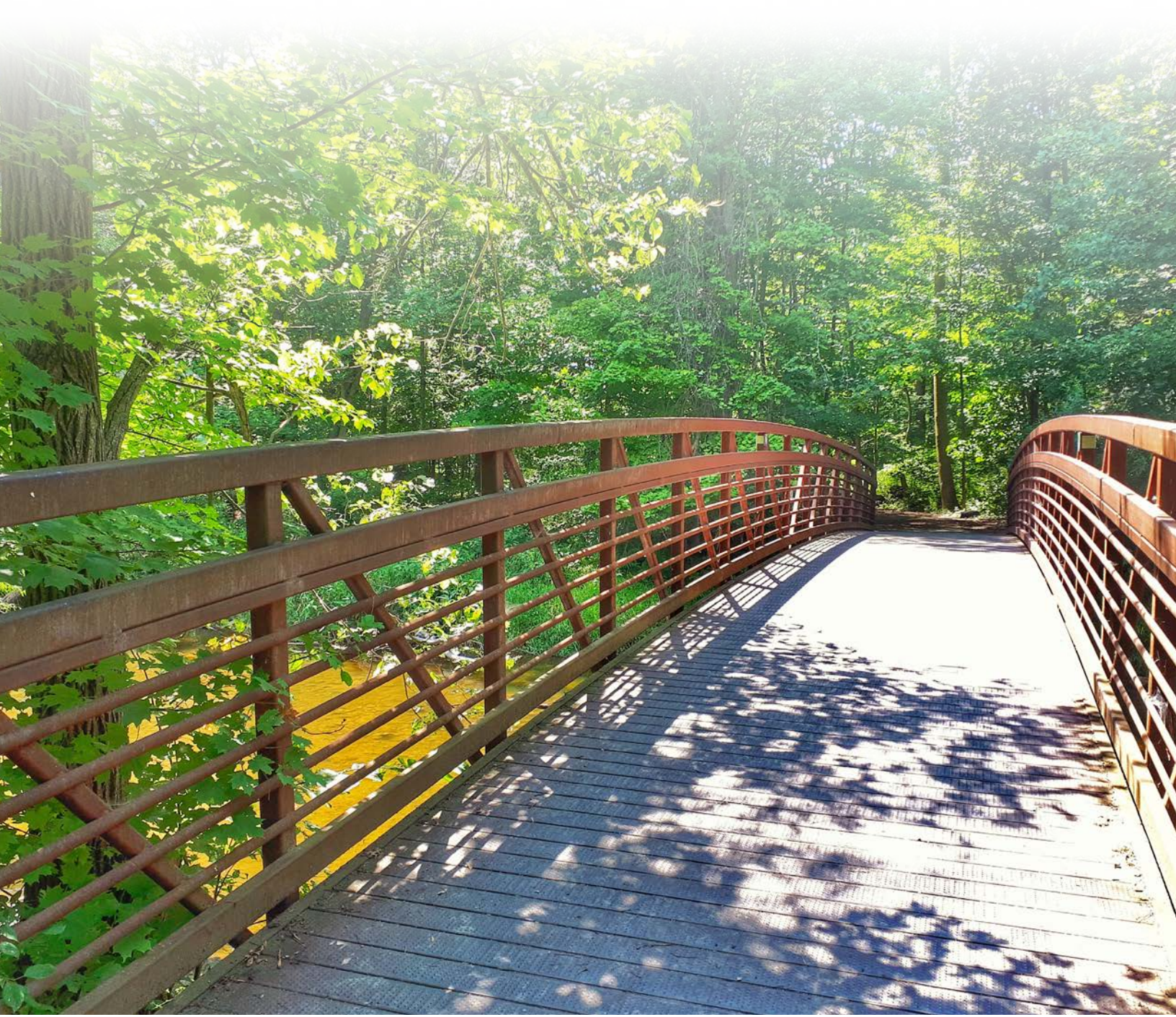




2023-2024

A YEAR OF CONNECTION & COLLECTIVE ACTION



ANNUAL COMMUNITY REPORT

YEAR IN REVIEW:

REFLECTIONS FROM FOUNDATION LEADERSHIP

Burlington Foundation's fiscal year was filled with new community learnings, nurturing relationships, building connections and collaborations within our vibrant community.

Our Foundation is at the heart of our evolving community, where inspiring collective action drives positive change.

Overall, the Foundation realized an 11.4% investment return in our April 1, 2023 to March 31, 2024 Fiscal Year.

The Foundation granted a total of \$1,245,907 to 121 charitable organizations, and along with our charitable activities, the Foundation's total disbursement was 6.43%, compared to the 5% Disbursement Quota mandated by the government.

This year, we have seen a rise in the key intersections of the social determinants of health, such as mental health, food insecurity, housing and social justice. We are grateful to our fundholders for being open to having bold and courageous conversations about how they can help have the greatest impact in Burlington, and for granting to organizations that are working to address these intersections. Together, we are advancing the well-being and sense of belonging through these actions.

At the core of our initiatives lies a fundamental truth: community is paramount. Looking forward, we acknowledge that staying relevant necessitates evolving alongside the community we serve.

Our Foundation is not merely about maintaining the status quo; it embraces change and innovation through initiatives like Community Conversations, where diverse voices converge to share perspectives. A critical insight we heard over the past year from the community service organizations we support is that the need for unrestricted giving and sustainable revenue has never been more important to advance their missions. These dialogues have illuminated philanthropy's role in addressing pressing community needs and how generosity planning through Donor Advised Funds can significantly impact charities.

As we commemorate our 25th anniversary in Fall 2024, we proudly reaffirm our dedication to the Burlington community. With each stride forward, we draw the community closer to the essence of our Foundation. Together, as Burlington's community foundation, we embark on a journey united by purpose and collective action.

Community transcends mere rhetoric for the Burlington Foundation; it has been the core of our mission for the past 25 years and reflects our ability to evolve with its changing needs.



CATHERINE BRADY
CHAIR, BOARD
OF DIRECTORS

MEGAN TREGUNNO
PRESIDENT
& CEO



ABOUT THE COVER PHOTO

This photo is courtesy of BurlingtonGreen, a Burlington-based environmental organization. Through advocacy and action initiatives, BurlingtonGreen collaborates with all sectors to protect the environment, mitigate climate change and to create a healthier, more environmentally responsible Burlington. As a Foundation, we were proud to provide a grant to BurlingtonGreen this past year to support the development of a new strategic plan and invest in their operational resiliency. *Photo credit: BurlingtonGreen.*



**READ OUR AUDITED
FINANCIAL STATEMENTS
FOR APRIL 1, 2023-
MARCH 31, 2024 [HERE.](#)**

www.BurlingtonFoundation.org

25 YEARS

OF COLLECTIVE ACTION



For a quarter of a century, Burlington Foundation has been dedicated to enhancing the quality of life in our community. Founded in 1999 with an initial \$100,000 seed donation, we have connected generous individuals, families, and corporate donors with thousands of community members in need through the work of charitable agency partners while fostering growth and strengthening connections along the way. Our story is deeply rooted in the community, addressing local needs such as housing, food insecurity, seniors' isolation, and the well-being of young people.

In our 25th year, we reflect on the profound impact of our collective giving and advocacy as a community foundation. Over the past two and a half decades, we

have disbursed \$11.4M in charitable grants, thanks to the generosity and vision of our fundholder and donor community. Today, Burlington Foundation holds the great responsibility of convening leaders across sectors to create change, stewarding \$25,063,140 in assets under management, including a permanent endowment fund, governed by our volunteer Board of Directors and Investment Committee.

The need for belonging and a sense of community has never been greater, especially after years of being apart due to COVID-19. Burlington Foundation stands resolute as a beacon of support and guidance, assisting community members and organizations in navigating complex issues such as homelessness, affordable

housing, food insecurity, mental health pressures, and environmental strain. We balance the commitment to meet community needs through grants and ensure the long-term growth of the Foundation's assets.

Establishing a Fund with the Burlington Foundation allows individuals to create a legacy that can endure for multiple generations. Unlike other public foundations, we provide insights into the community's greatest needs and offer opportunities to network with other donors, amplifying the impact of their contributions. A Fund offers significant flexibility in tax planning and enables individuals to involve their families in allocating gifts to charities, imparting the value of giving back.

Looking ahead, Burlington Foundation remains dedicated to evolving with the community and meeting its ever-changing needs. Our new strategic plan, set to be unveiled in early 2025, will chart our priorities and impact forward, ensuring that we continue to foster growth and connection across our community.

As we embark on the next chapter of our journey, we invite community members to join us. Together, we can build upon our legacy of generosity and create a brighter, more resilient future for all members of our community. Thank you for your unwavering support over the past 25 years. Here's to the next quarter century of making Burlington an even better place to live for everyone.



GRANTS IN ACTION



In 2023/24, the Burlington Foundation and our fundholders and community partners granted funding to 121 charitable organizations. A total of \$1,245,907 in funding was distributed through grants, a testament to our collective role in responding to Burlington's evolving needs. Since its inception in 1999, the Burlington Foundation has awarded grants totaling \$11.4M.

The grants distributed in the past year have impacted various aspects of life in Burlington. These contributions have empowered organizations to implement initiatives that address critical needs and enhance the quality of life for individuals and families across the City.

We invite you to explore the complete list of grants awarded in 2023/24, along with detailed amounts and recipient organizations on our website www.BurlingtonFoundation.org. We are proud to partner with our fundholders to help drive positive change in our community.

We are pleased to highlight a few Grants in Action from our Burlington Community Fund. These represent a diverse range of 17 projects supported, totaling \$126,000 in grant funding from this Fund alone.



CYCLING WITHOUT AGE

The Hamilton and Burlington chapter of Cycling Without Age, spearheaded by Nancy Gray and Jill Axisa, began in June 2018, further materializing in late 2020 when Tammy Heidbuurt of New Hope Community Bikes and Emily of Hamilton-Oshawa Port Authority (HOPA) joined the effort. With backing from McMaster University and HOPA, the chapter officially launched in July 2021, acquiring its inaugural trishaw. Starting at the Welcome Inn Community Centre, the program quickly expanded to Burlington in 2022, thanks to the City of Burlington's support and an anonymous donor's generosity, facilitating the purchase of a second trishaw. A third trishaw was obtained 2023 through a federal grant, enabling further growth and participation in numerous locations and events throughout the year.

The program thrives with over 65 dedicated volunteers, including pilot trainers, site coordinators, pilots, and bike buddies, offering seniors the joy of outdoor rides. New Hope Community Bikes is pivotal, providing essential infrastructure, administration, and logistical support, ensuring the program's continued success and impact across multiple partner agencies and centers in the region.

COMMUNITY IMPACT OF BURLINGTON FOUNDATION FUNDING

- The grant will enable New Hope Community Bikes and the CWA chapter to provide 450 accessible bike rides to Burlington seniors, thereby promoting connection, well-being, and activity in the community.

NEWHOPECOMMUNITYBIKES.COM

✉ CwaHamilton@gmail.com

☎ 905.399.4965

📍 1249 Main ST. E.
Hamilton ON

🐦 [CwaHamilton](#)

📘 [CwaHamilton](#)

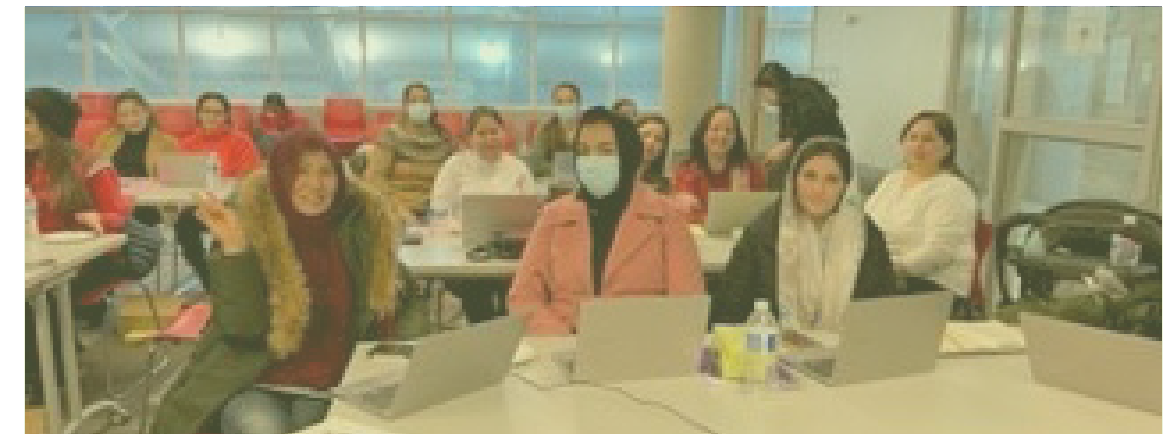
📷 [NewHopeBike](#)



Refugee Women's Network



HALTON FOOD FOR THOUGHT



REFUGEE WOMEN'S NETWORK

Halton Food for Thought's (HFFT) vision is a Halton Region in which "no student goes hungry at school." The agency is the sole provider of School Nutrition Programs (SNPs), which offer nutritious meals and snacks at no cost in schools across the Halton Region through stigma-free delivery. Through the provision of healthy food, every student has the best chance of succeeding, with positive impacts on student health and academic performance. Current programs operate in 48 out of 54 public and Catholic schools in Burlington, benefiting 25,388 students.

Refugee Women's Network empowers refugee and new immigrant women with the tools and resources to enhance and develop their skills through education, helping them successfully integrate into Canadian society while maintaining their respective cultural values. The organization knows that changing one woman's life positively affects the lives of her family and community. Refugee Women's Network programs are a stepping stone to providing sustainable skills to enable women to be confident, empowered, and educated, helping women to contribute to society, be financially self-sufficient, and advocate for her family. Refugee Women's Network helps refugee and new immigrant women become a vibrant part of Canada's economic and social development.

COMMUNITY IMPACT OF BURLINGTON FOUNDATION FUNDING

COMMUNITY IMPACT OF BURLINGTON FOUNDATION FUNDING

- Project goals include recruiting and training volunteers, ensuring safe food handling, and providing the necessary infrastructure for SNPs.
- Will launch new SNPs in two new partner schools in Burlington that do not currently have access to HFFT programs, food handling, and providing the necessary infrastructure for SNPs.

- Will support the growth of a Women Helping Women program to offer a supportive community for Afghan women settling in Burlington.

HALTONFOODFORTHOUGHT.COM

REFUGEEWOMENSNETWORK.ORG

- ✉ Info@HaltonFoodForThought.com
- ☎ 289.288.4110
- 📍 100-5063 North Service Rd Burlington ON
- 🐦 HaltonFFT
- 📘 HaltonFoodForThought
- 📷 HaltonFoodForThought

- ✉ Zein@RefugeeWomensNetwork.org
- ☎ 416.721.4038
- 🐦 RefugeeWomens
- 📘 RefugeeWomensNetwork









THE SALVATION ARMY BURLINGTON COMMUNITY & FAMILY SERVICES

Community Cooking Connections fosters an environment where people can gather, cook, and sample international food. It encourages individuals to share their culture through food, breaking down barriers and creating a sense of community. The program offers various benefits, including teaching cooking skills and tips, preparing economical meals using ingredients from the Food Bank, introducing new meal planning ideas beyond one's cultural norms, and highlighting the cost of each recipe. Each participant receives professionally prepared meal kits, similar to meal delivery programs.

COMMUNITY IMPACT OF BURLINGTON FOUNDATION FUNDING

- Will enable Salvation Army Burlington Community & Family Services to continue the project, fostering immediate connections among participants and providing an opportunity for people to feel the warmth of community, while meeting new people and sharing their own cultural experiences.

[SALVATIONARMY.CA](https://www.salvationarmy.ca)

-  GeneralSupport_BurlCFS@SalvationArmy.ca
-  1.800.725.2769
-  9-5040 Mainway, Burlington ON
-  [SalvationArmy](https://twitter.com/SalvationArmy)
-  [SalvationArmyBurlingtonCFS](https://www.facebook.com/SalvationArmyBurlingtonCFS)
-  [TheSalvationArmyBurlington](https://www.instagram.com/TheSalvationArmyBurlington)

Community Services Recovery Fund



PARTNERING FOR LOCAL IMPACT: CSRF GRANTING

The Burlington Foundation is continually looked upon as a strategic community partner to deliver local funding from the federal government. In our Fiscal 2023/24 year, the Foundation had the great responsibility of allocating \$532,000 in funding to local organizations as part of the Community Services Recovery Fund (CSRF). CSRF funding was designed to revitalize community service organizations, charities, non-profits, and Indigenous governing bodies nationwide, helping them modernize and adapt their services.

Funding Distribution:

- **Halton Region Conservation Authority:** \$100,000 for an Innovation Hub to enhance community engagement.
- **BurlingtonGreen Environmental Association:** \$63,463 to boost organizational resiliency for environmental advocacy.
- **Central Canadian District of the Christian and Missionary Alliance in Canada:** \$85,560 for a new Human Resources Information System.
- **Restorations Second Stage Homes:** \$50,206 to update governance policies and create a new strategic plan for supporting human trafficking survivors.
- **West Plains United Church:** \$47,771 for IT/AV enhancements to improve virtual connectivity.
- **Compassion Society of Halton:** \$100,000 to hire additional staff to support vulnerable populations.
- **Halton Islamic Association:** \$85,000 to modernize and improve organizational resiliency.

This funding aims to empower these organizations, fostering a resilient, inclusive, and vibrant Burlington.



COMMUNITY CONVERSATIONS: A FOUNDATION SERIES

LAUNCHED TO SPARK ENGAGEMENT
AND INSPIRE COLLABORATIVE ACTION



The Community Conversations Series has emerged as an important avenue for change in the heart of Burlington, a city filled with diversity, opportunity, and a shared commitment to progress. Initiated as a platform to ignite engagement and catalyze collaborative action, this initiative has become a cornerstone in addressing pressing issues and fostering meaningful change.

The Burlington Foundation established this conversation series as an extension of its work in collaborating across sectors, bringing leaders together, and advocating for community well-being and social equity. Leveraging its network and deep-rooted ties within the community, the Foundation envisioned a space where voices could converge, ideas could flourish, and action could take flight.

Since its inception, Community Conversations has been a conduit for dialogue, empathy, and collective empowerment. Throughout 2023, three pivotal conversations took place, drawing in a mosaic of community leaders, stakeholders, corporate leaders, Foundation fundholders, and passionate donors. Together, they delved into the crux of societal challenges, unpacking the complexities surrounding mental health, housing, and food insecurity.

The true essence of these conversations lies in the voices of those on the front line—the charity partners tirelessly championing changes amidst adversities. Their invaluable insights underscore the urgent need for unrestricted funding to fuel their missions and the pivotal role of sustainability in their operations.

Amidst the challenges, an important call to action emerges to connect, engage, and mobilize resources toward a common purpose. This is the unique role the community foundation plays in Burlington.

“These vital conversations help us to come together regularly to connect with our charity partners and the community. They create a brave space for sharing, listening, learning and a forum for collaboration,” says Megan Tregunno, the Burlington Foundation’s CEO. “Our role as a community foundation is to evolve with the community and to align resources to where they’re needed most today while planning for future needs.”

Community Conversations beckon us to embrace our collective responsibility—to amplify voices, engage, and inform residents. Together, we can take collective action and ensure resources are directed to the most pressing needs that help advance the well-being of Burlington.

Simpson Wigle LLP is a steadfast ally committed to advancing social justice and civic engagement and guiding these discussions with unwavering support and legal expertise. Their partnership has fortified the foundation of Community Conversations, ensuring that every dialogue is anchored in integrity, inclusivity, and actionable insights.





ART GALLERY OF BURLINGTON FUND

The Art Gallery of Burlington (AGB) has been a driving force for arts and culture in our community for decades. The AGB provides access to the arts, thought-provoking exhibitions, and accessible, inclusive educational programming for all ages.

The mission of the AGB is supported by many different revenue streams, including an Agency Fund held by the Burlington Foundation. The AGB Board of Directors established an Agency Fund with the Burlington Foundation in 2002 with a vision for ensuring its operational sustainability. “We are proud to hold a Fund with our local community foundation and believe this is a deeply important avenue for sustainable funding for the AGB as we embark on one of the boldest chapters of our growth in the coming years,” says Susan Busby, AGB Chair of the Board.

The Fund grows through the generosity of AGB supporters and donations, including legacy gifts in Estates and Wills. To learn more about the AGB’s work and mission, visit AGB.life.

AGENCY FUNDS HELP PROVIDE SUSTAINABILITY

Local charities, known as Agencies, choose to establish an Endowment Fund to help support the sustainable operations of their mission. Burlington Foundation is proud to partner with the following local Agencies to support the stewardship of their Agency Funds.

- *Art Gallery of Burlington Fund
- 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 Endowment Fund
- *Burlington Museums Foundation Fund
- Burlington Teen Tour Band Boosters Inc. Fund
- Carpenter Hospice Family of Funds:
 - Carpenter Hospice Endowment Fund
 - Walter & Louise White Fund
- Community Living Burlington Fund
- Conservation Halton Green Values Fund
- *Conservation Halton Foundation Fund
- Halton Women’s Place Fund
- United Way of Halton & Hamilton Campaign Fund
- United Way of Halton & Hamilton Tomorrow and Forever Fund

**Funds held on behalf of others*



FUNDHOLDER SPOTLIGHT



JEAN ELLEN GRIFFIN FUND

Late Burlington resident Jean Ellen Griffin established a Donor Advised Fund with Burlington Foundation more than 20 years ago at the time of her estate planning. Jean wanted to ensure her love for animals and helping others would have a lasting legacy in our community. A bequest in Jean's Will did just that.

"Jean was an animal lover and always wanted to have people be able to get help for their pets. In creating an estate fund, she is fulfilling her dream of helping people who need it the most," said Dr. Marilyn Loh, Burlington Veterinarian.

This year, Jean's Fund granted \$33,000 to two local animal-welfare organizations that will help to ensure families in need have the resources to provide care for their beloved pets. Jean's legacy of compassion will forever live on across our community.

If you're interested in learning how to incorporate your estate planning into your generosity planning or Fund growth, please connect with a member of our team.

Love, Jayne

FOUNDATION

LOVE, JAYNE FOUNDATION (FUND)

In her eight special years, Burlington community member Jayne Anne Hounslow inspired a legacy of kindness and compassion. Jayne died tragically in 2023. The Hounslow family turned to the Burlington Foundation to set up an immediate temporary Fund to accept in memoriam donations honouring Jayne.

Burlington residents came together to honour Jayne's legacy of kindness towards others. In the Foundation's first year, more than 350 community donors contributed to the launch of the Love, Jayne Foundation (Fund) held at the Burlington Foundation. To date, over \$155,000 has been raised in donations. An immediate grant of \$25,000 was directed to the Angel Fund at Central Public School in memory of Jayne, and the remainder is held in perpetuity through a permanently endowed Donor Advised Fund. Annual income from the Fund will enable grants to be made to charitable organizations that help young people without financial means access

recreational activities such as camps, sports, and extracurriculars that contribute to their well-being. Jayne's legacy of kindness lives on through her community impact forever.



Visit LoveJayne.ca to learn more about the Love, Jayne Foundation or to donate to support young people in our community.



Memorials and tributes can help you remember or celebrate a loved one by supporting a cause that reflects their accomplishments and passions.

Either in memoriam or to honour life milestones, the Foundation has options to help you support the community in the name of someone you love.

Establishing a temporary fund to receive memorial or tribute gifts can be coordinated at any time. We are here to help in any way we can.

Please contact our team to learn more:

BurlingtonFoundation.org

DID YOU KNOW?

DIFFERENT FUND TYPES ARE DESIGNED TO SUPPORT YOUR GENEROSITY PLANNING

AGENCY: Funds are designed to support registered charities by providing a sustainable revenue source. Income generated goes back into the mission and operations of the organization annually.

COMMUNITY: A Community Fund (unrestricted) provides the Foundation with the flexibility to decide where the earnings can be used most effectively each year to meet the evolving needs of the community.

DONOR ADVISED: Donor Advised Funds provide donors with the opportunity to be involved in recommending the annual grants from their Funds. Donors can count on Foundation staff for support in these decisions. Donor Advised Funds can also be established through confirmation of bequests and estate gifts to the Foundation.

DONOR DESIGNATED: With a Donor Designated Fund, donors may specify a charity as the beneficiary of their grants each year in perpetuity.

FIELD OF INTEREST: Field of Interest Funds are dedicated to a particular sector that supports the donor's interests, such as children and youth, arts and culture and more. Donors can be involved in recommending the annual grants from their Funds or turn to the Foundation team for support in these decisions.

SCHOLARSHIPS, AWARDS & BURSARIES: Scholarships, Bursaries and Awards created by donors ensure that students have important funding to assist with their post-secondary education.



FUNDS HELD AT BURLINGTON FOUNDATION

People come to our Foundation to learn how to make a difference in our community. It begins with the simple act of caring. Our team works with individuals and businesses to build a generosity plan aligning with their vision. This often includes giving to an existing fund, or establishing their own unique endowment fund, ensuring the impact of their generosity is felt in perpetuity across Burlington.

Our Foundation has a wide range of funds to choose from that suit your interest. We have flexible fund options that allow donors to name a fund at a certain minimum level. Many consider establishing a fund in their own name, as a family, or to honour someone they care about. The following is a list of funds that the Burlington Foundation holds, created by community-minded citizens, organizations and businesses.



DONOR ADVISED FUNDS

(INCLUDING DONOR DESIGNATED, FIELD OF INTEREST AND COMMUNITY)

- 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
- Brechin, Huffman and Henderson Fund
- Burlington Community Foundation Impact Fund
- Burlington Community Fund
- Burlington Community Youth Advancement Fund
- CLV Group/InterRent REIT Philanthropic 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
- Dr. John and Jennifer Bozek Family Fund
- Erica & 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)
- Gurpuran & Marianne Singh-Waraich Fund
- GWD Foundation for Kids
- H. Fred Janson Fund for the Developmentally Handicapped
- Haggerty/Durocher Fund
- Halton Heroes Fund (Endowed and Term)
- Hamilton Family Fund
- Healthy Reflections Canada Fund (Endowed and Term)
- Helen Zdriluk Memorial Fund for the Performing Arts (Endowed and Term)
- Hogarth Family Foundation Fund
- James Paton Heron Fund
- Jean Ellen Griffin Fund
- Joyce Cooper Foundation Fund
- Kempe Family Fund
- Kimberley Kovalchek Legacy Fund
- Leggat Family Fund
- LKH Legacy Fund
- LKH Spirit Fund
- Louise Cooke Fund for the Visual and Performing Arts
- Marsh Family Fund
- Mayor's Gala Fund
- Mayor's Green Fund
- M.E. Devitt Term Fund
- Mental Wellness 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 Fund – Child & Youth in Recreation

- Pasquale (Pat) and Anita Paletta Foundation Fund
- Paul Hansell Foundation Fund
- Performing Arts Burlington Fund
- Performing Arts Youth Endowment Fund
- Pieczonka Family Foundation Fund
- Pioneer Group Term Fund
- Plains Road Village Vision 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 (Endowment and Term)
- Sarah and Donald Munro Memorial Fund
- Smiling Hearts Foundation Fund (Endowed and Term)
- Smith Family Fund
- Susan Marcus Foundation Fund
- Sydney Robis Memorial Fund
- Ufflemann Family Foundation Fund
- Valley Fund
- Vaski Family Performing Arts Fund
- Wealthbuilding Foundation Fund
- Weatherdon Fund for Early and Lifelong Nutrition
- William and Susan McGregor Fund

SCHOLARSHIPS, BURSARIES AND AWARDS

- Aldershot School Fund
- Burlington Chamber of Commerce Scholarship Fund
- Burlington Economic Development Corporation Mayor's Apprenticeship Fund
- Burlington Medical Society Scholarship Fund
- Cheryl Miles Goldring Foundation Fund
- Lawrence Sinclair Scholarship Fund
- Legacy of The Junior League Hamilton-Burlington Inc. Fund
- Mario Rende Scholarship Fund
- Matthew C. Daly Scholarship Fund
- Mayor Rick Goldring Scholarship Fund
- SB Partners Scholarship Fund

NEW FUNDS

THE FOLLOWING FUNDS WERE ESTABLISHED IN 2023-2024.

- Birbari Wealth Management Fund
- Dunsford Family Term Fund
- Lorraine and Andrew Smith Community Fund
- Love, Jayne Foundation Fund

Thank You

Our sincere gratitude and heartfelt thanks to all the people that make the work of the Burlington Foundation possible. Thank you to our volunteers, Board of Directors, donors, funders, fundholders, community organizations and committees. We could not do our impactful work without your dedication, time, loyalty, and financial contributions. Your desire to help those in need in our community is truly priceless.

For many years, corporations and partners in our community have supported the Foundation's mission, demonstrating their profound belief in supporting Burlington today and into the future.

Thank you to our corporate and family foundation partners for your generosity throughout the year and for funding the mission of our community foundation.



SimpsonWigle
LAW LLP



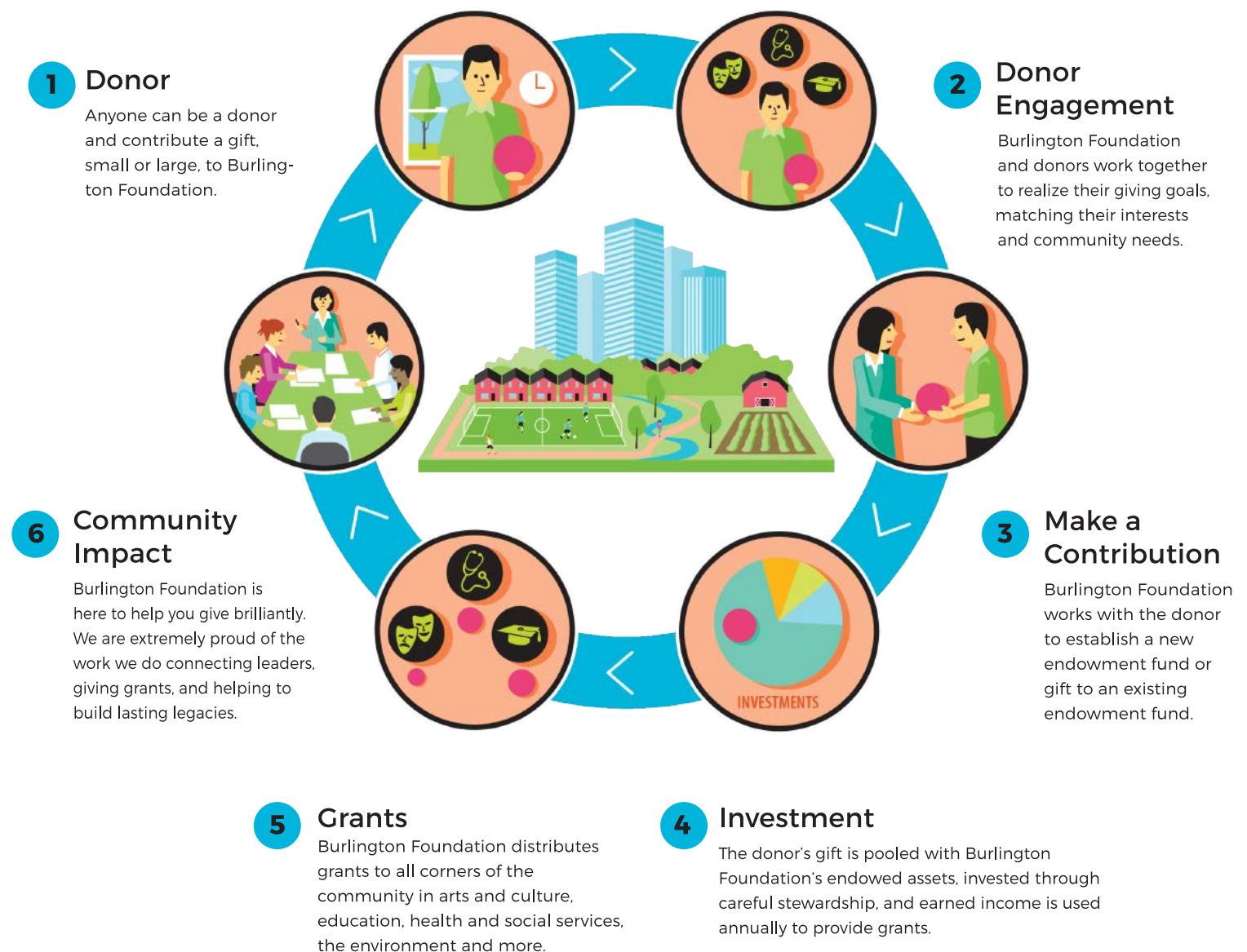
**Pieczonka Family
Foundation**

**The Pioneer Group &
The Hogarth Family**

How Burlington Foundation Works



Burlington Foundation is a charitable non-profit organization that has a long and trusted history of contributing time, leadership and financial gifts to charitable initiatives that benefit our community the most.



If you want to learn how your company or organization can support the Burlington community, please contact our team:
Info@BurlingtonFoundation.org or 905.639.0744.

ABOUT US



We are proud to work with our community to address vital needs, collaborate across sectors around collective action, and partner with our fundholders and donors to support their generosity planning.



-MEGAN TREGUNNO



We are Burlington's community foundation and have been leading change and supporting hundreds of non-profit organizations for over 25 years. We are one of 200+ community foundations across Canada working to create an inspired, strong, and sustainable future in our local community. We address local needs and issues, give grants to action change and progress, and engage community members, non-profit organizations, leaders, and partners to support community collaboration.

Thanks to the generosity of our fundholders, we manage and steward community assets through a community endowment fund. We distribute annual grants to address current critical community needs and grow future funding through endowment building to ensure the ability to support emerging needs.

We are building a more connected Burlington through community engagement and supporting our citizens to help realize their vision for the community through generosity planning.



OUR MISSION

We understand the difference we can make is greater when people work together. Our role is to make that happen.



VISION FORWARD

We envision a Burlington where everyone is connected and belongs. We imagine a Burlington where informed and engaged citizens are leading and impacting change through collective action and generosity.

To achieve our vision, we critically assess our position as community leaders and identify how and where we need to evolve. We pledge to work with our Board and leadership to ensure all voices from the community are heard, included and that they reflect who Burlington is today.

We are committed to investing in our growth to continue having nimble and timely responses to our community's changing needs. This means investing in tools and our Foundation operations to support how donors and community members can and want to engage.

We have a deep sense of pride and great responsibility as a community leader. We are grateful to be part of a network of Canadian foundations working to build more connected communities and communities where everyone belongs.



OUR TEAM

MEGAN TREGUNNO, CFRE

President & CEO

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OSOB ADUS

Director, Grants & Community Engagement

289.779.7950

OAdus@BurlingtonFoundation.org

FINANCE INQUIRIES

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2023-2024 BOARD OF DIRECTORS

**CATHERINE BRADY,
CHAIR**
Retired Business
Leader & Community
Advocate

**MATT AFINEC,
IMMEDIATE PAST CHAIR**
President & COO, Business
Operations, Hamilton
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and Forge FC Hamilton
Soccer Club

KEVIN BRADY
Director, Advica Health;
Director Corporate
Health, NFP Canada

**TIM CESTNICK,
CHAIR, INVESTMENT
COMMITTEE**
Co-Founder and CEO,
Our Family Office Inc.

**DOM MARINIC,
INVESTMENT
COMMITTEE**
Director of Investments,
The Pioneer Group Inc.

**CARLOS ALVAREZ,
TREASURER & SECRETARY**
Partner, KPMG LLP

CATHERINE OLSIAK
Partner, SimpsonWigle Law LLP

INVESTMENT COMMITTEE

To ensure the goals of the Foundation are met, an Investment Committee of senior volunteers with extensive knowledge in the investment field provides oversight and monitors investment performance. Reporting to the Board of Directors, the Committee is responsible for:

- ✔ Establishing our investment policy
- ✔ Establishing target asset mix
- ✔ Monitoring performance
- ✔ Monitoring the Foundation's disbursement rate

TIM CESTNICK, CHAIR
Co-Founder and CEO,
Our Family Office Inc.







**LISA RITCHIE
INCOMING CHAIR**
Vice President
Emeritus, Burgundy
Asset Management Ltd.


PHIL REDDON
Managing Partner,
Covington Capital Corp.

DOM MARINIC
Foundation Board
Member & Director
of Investments, The
Pioneer Group Inc.



GET IN TOUCH WITH US

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-  @BurlingtonFoundation
-  Charitable Registration #857812739 RR 0001



On behalf of the Burlington Foundation Board of Directors and staff team, we extend our heartfelt gratitude to Catherine Brady, who has served as Chair of our Foundation Board for the past two years, and as a Director for several years prior. Catherine will begin her final year with the Board as Past Chair in July 2024. Catherine's unwavering dedication and astute guidance have been a cornerstone of our success. Over the past two years, her leadership has helped the Foundation grow into its next growth phase and, most notably, position the Foundation for continued impact through critical investments in our infrastructure, systems and tools to support our fundholders and granting.

Thank you, Catherine, for your invaluable contributions and commitment to advancing Burlington's well-being.