



2023 - 2024  
**ANNUAL  
REPORT**

FISCAL YEAR  
August 1 2023 - July 31 2024





# **The Perth and District Community Foundation grows and strengthens community so that everyone belongs and thrives, today and in the future.**

## **OVERVIEW**

The 2023-2024 Fiscal Year was one of evolution and growth for PDCF. We grew the endowment fund to over \$7.3 million and made significant strides on all three strategic directions set by the Board of Directors in the 2023-2026 Strategic Plan:

### **Community Building**

As part of our goal to build the strength and resilience of local community organizations and increase collaboration, PDCF facilitated a strategic planning session for The Hospice Hub, and acted in an advisory capacity to Planet Youth, and Highlands North Network. We hosted a presentation on governance best practices and facilitated two workshops on stress management for members of the Perth and District Chamber of Commerce.

In order to increase awareness about PDCF in the communities we serve, we created and distributed rack cards, stickers and posters and also mounted large placards at the Lanark and Perth arenas, the Perth and District Indoor Swimming Pool, and the Stewart Park Festival.

### **Granting for Impact**

PDCF granted out \$172,674 more dollars to community organizations from the PDCF Endowment than we did in the 2022-23 fiscal year. We also hosted a consultation with grantees in March to find out how we could better support them through trust-based philanthropy. The feedback we received was incorporated into the 2024-2025 granting cycle.

### **Fund Development**

The number of active funds with PDCF increased from 63 to 66 and our number of donors almost tripled. The percentage of unrestricted funds increased slightly, and we expect it will rise even more in 2025 with the creation of the Community Granting Fund. The Board of Directors held discussions and developed the beginnings of a Responsible Investment Policy which looks at ways to increase the positive impacts of investments both in the market and in the community.

**We acknowledge that Lanark County is situated on the ancestral and unceded traditional land of the Omàmiwinini, also known as the Algonquin Anishinaabe Nation.**

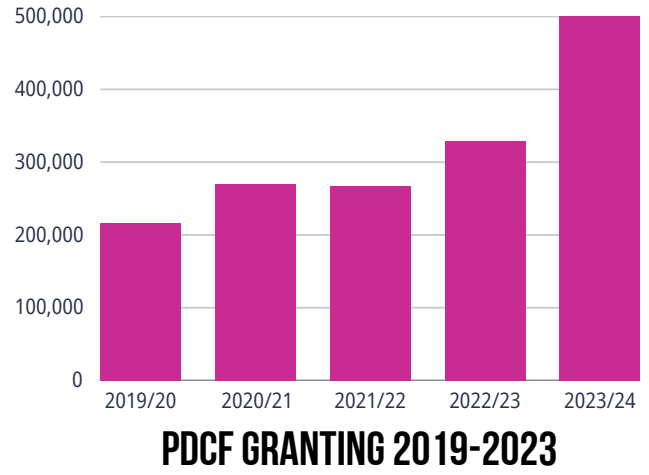
With this acknowledgment comes respect for the land and the people who have been living here since time immemorial. As part of this land acknowledgment, we recognize the injustices of the past and those that continue today. We recognize our responsibility to contribute to reconciliation between Indigenous and non-Indigenous peoples of the land we call Canada.

To this end, we are learning about the impact of colonization on the Indigenous peoples of Canada, we have established an annual Indigenous Youth Award, through our partnership with Indspire, a national Indigenous charity, and we will communicate the results of our actions to the community.

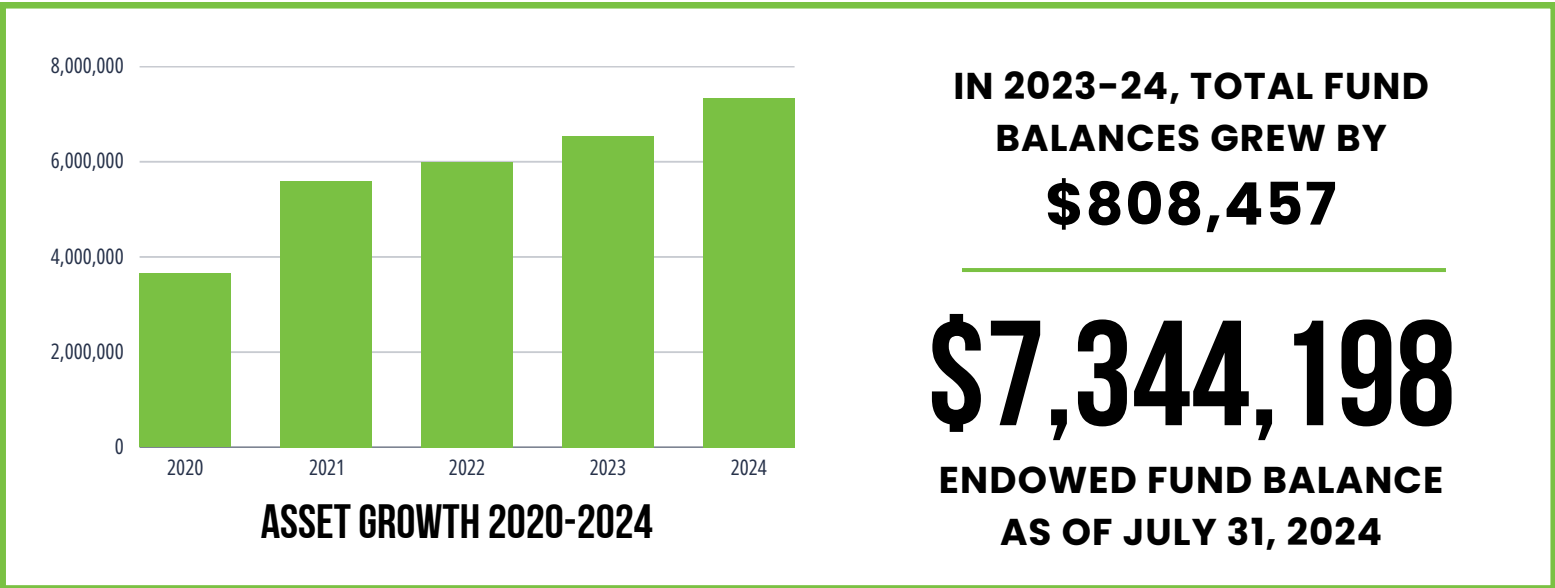
**IN 2023-2024, PDCF AWARDED 27 GRANTS AND 19 SCHOLARSHIPS & BURSARIES**

PDCF Grants to Local Organizations	\$188,119
Designated Grants to Charities	\$296,413
Scholarships, Bursaries & Awards	\$17,496

**2023-2024  
TOTAL \$501,789**



**SINCE 2003, WE HAVE GRANTED OVER \$2,800,000**



**IN 2023-24, TOTAL FUND BALANCES GREW BY \$808,457**

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**\$7,344,198**

**ENDOWED FUND BALANCE AS OF JULY 31, 2024**

**\$366,181** TOTAL DONATIONS BY INDIVIDUALS AND LOCAL ORGANIZATIONS IN 2023-2024

**1,579** Individual Donations      **1,298** Total Donors      **66** Active Funds



## AUGUST 2023

In what has become an annual fun event, about 25 people gathered at the Oakfield Rugby clubhouse on August 29th to pick the fresh hops that are used in Many Hands Harvest Pale Ale, made by Perth Brewery. Many thanks to Lynn McIntyre and Bill Arnaud for the hops and to the Perth Brewery for the proceeds from the sales!



## SEPTEMBER 2023

PDCF's executive director, Victoria Gibb-Carsley, designed and facilitated a strategic planning session with The Hospice Hub which had only just formed. The group discussed values, goals, and next steps for the organization which then flourished over the course of the year.

## OCTOBER 2023

PDCF hosted a one-day workshop called Duties & Practices for Good Governance of Non-Profits which was led by Don McCreesh, a governance expert with over 40 years of experience in Canada's charity and not-for-profit sector.

Over 40 attended from 17 local groups. The workshop helped both board members and staff of local organizations learn about the roles of non-profit boards and the legal and financial responsibilities of individual board members as well as some best practices for a well-run board of directors.





## NOVEMBER 2023

The Grants Committee met to review and decide on Community Grant applications. PDCF participated in several events including a conversation about supporting newcomers hosted by the Town of Perth and Lanark Immigration Partnership and a Lanark Basic Income information session held at The Table Community Food Centre.

## DECEMBER 2023

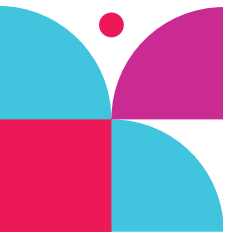
Auditors from Kelly Huibers McNeely completed the audit for fiscal year 2022-2023. The Communications and the Fund Development committees completed their action plans for 2024, and the executive director wrote the PDCF Annual Report.



## JANUARY 2024

PDCF welcomed five new board members in January to form our 2024-2025 Board of Directors:

- David Poole, President and Chair of Governance Committee
- Kay Rogers, Vice-President, and Chair of Grants Committee
- Shannon Baillon, Treasurer, and Chair of Finance, Investment & Audit Committee
- Michael Couchman, Secretary
- Terry Daly, Chair of Fund Development Committee
- Ann Hawthorne, Chair of Communications Committee
- and Directors Rebecca Waterhouse, Philippa Syme, Chris Chaplin, Youssef Sawan, Glenn Tunnock, and Jordan Kennie



# FEBRUARY 2024

We distributed Community Grants to successful applicants totaling \$174,619

## **Big Brothers Big Sisters of Lanark County / Queer Connection Lanark (QCL)**

**\$12,538**

To develop an interactive 2SLGBTQIA+ resource and education kit that provides inclusion training for youth and service providers in a rural setting.

## **Climate Network Lanark \$10,000**

To fund two sets of education and networking forums about electrifying homes and buildings to help decrease greenhouse gas emissions.

## **Friends of the Smiths Falls and District Library**

**\$2,000**

To fund a permanent, mobile, Patient Pastime Library for patients at both locations of the Perth and Smiths Falls District Hospital.

## **The Hospice Hub**

**\$25,000**

To help build their volunteer and staff workforce, develop communications and financial strategies, set up social and online infrastructure, and start offering hospice home support.



## **Lanark County Basic Income Network (LBIN)**

**\$4,000**

To develop a number of tools, including a website and printed materials, to educate people about the principles of basic income and its benefits.

## **Lanark County Community Justice (LCCJ)**

**\$9,500**

To provide Triple P Parenting of Teens and Pre-teens education sessions for parents, caregivers and legal guardians who are struggling to support the teenagers in their lives.

## **Lanark County Interval House \$5,000**

To hold a series of targeted presentations to youth and adult community groups and organizations in order to initiate public conversations on domestic violence.

## Lanark & District Museum

**\$6,613.74**

To replace two sash windows at the front of the museum to help with climate control and the preservation of historic documents and artifacts.



## Middleville & District Museum

**\$3,000**

To provide educational workshops on a range of subjects such as the Hopetown Telephone Company, the museum's photographic collection, genealogy, and the medicinal use of native plants.

## Lanark Highlands Public Library

**\$3,697**

To expand its "Library of Things and Experiences" collections by acquiring active lifestyle, crafting and educational items.

## Linden Cooperative Housing

**\$12,000**

To build awareness and support for their new cooperative housing initiative in Perth.

## Parkinson's Community Network (PCN)

**\$2,100**

To increase the awareness of health professionals about the support services available in the community for people with Parkinson's or their care provider.

## PEP (Seniors Therapeutic Centre)

**\$12,960**

To provide all PEP clients with physiotherapy assessments four times per year, and to expand its range of offerings to include "Golden Games Afternoon" and "Music in Movement" programs.



## The Listening Room Concert Series

**\$2,500**

To purchase a portable sound system to eliminate the need to rent a sound system. This will increase the proceeds from concerts that are donated to various local non-profit organizations.

## Planet Youth Lanark County

**\$5,000**

To hold youth engagement forums in Perth, Tay Valley, Lanark Highlands and Drummond-North Elmsley to encourage youth to come together to share their views, and amplify their voices to inform and influence decision-makers. This is a critical step in a process with the organization's goal of improving health and reducing/preventing substance abuse among youth.



**Queer Connection Lanark (QCL) /  
Perth and District Union Public Library**  
**\$5,000**

To host a speaker series to demystify the Queer culture and community, provide vital information, and create a sense of connection, belonging and understanding among communities.



**South Lanark Community  
Garden (SLCG)**

**\$8,960**

To purchase a walk-behind garden tiller to increase the seasonal vegetable yield. The vegetables are consumed by the community and shared with the Table Community Food Centre.

**The Table Community Food Centre**  
**\$11,000**

To install ten new raised garden beds in community gardens and school yards, and to improve knowledge and confidence with gardening by developing and offering workshops on key garden topics.

**Therapeutic Riding Program  
(ConnectWell)**

**\$2,000**

To purchase new helmets for participants in their riding program.

**Watersheds Canada**

**\$6,800**

To provide a multi-faceted educational project for community members to learn about and act on the negative effects of road salt on freshwater.



**Stewart Park Festival**

**\$5,000**

To support the 2024 Stewart Park Festival.

**YAK (Youth Action Kommittee)**

**\$15,000**

To run a Mental Health Initiatives Program for youth, offering mental health workshops and one-on-one counselling sessions throughout the year.







## MARCH 2024

PDCF led a consultation on Trust-Based Philanthropy, bringing together over a dozen representatives from organizations that we have funded. We wanted to know how we could better support the needs of charitable organizations in the communities we serve. The feedback we received resulted in changes to our grant application and the option for two-year grants.



## APRIL 2024

For the third year in a row, as part of our commitment to working towards Reconciliation, PDCF offered Community Grant recipients the opportunity to take part in NVision's online course, *The Path: Your Journey Through Indigenous Canada*, as well as follow-up Kitchen Table Discussions facilitated by NVision staff-member, Jennifer David. A total of 16 local organizations, including PDCF, sent participants to the training.



## MAY 2024

Victoria Gibb-Carsley, attended the Community Foundations of Canada (CFC) Peer Gathering in Winnipeg in early May. CFC asked Victoria to co-design and facilitate the workshop "Telling Your Foundation's Story." She led the workshop, and communication staff from Winnipeg and Victoria Community Foundations lent their expertise.



# JUNE 2024

In early June, Executive Director, Victoria Gibb-Carsley co-designed and facilitated a workshop with James Beaton for local business owners, managers, and non-profit leaders called *“Navigating Stress ~ Building Connections ~ Creating Balance.”* The workshop, offered twice, was attended by 14 participants.

PDCF distributed \$17496 in scholarships bursaries and awards at Perth & District Collegiate Institute, St John Catholic High School, and TR Leger.



# JULY 2024

In order to increase awareness about PDCF in the communities we serve, we created and distributed rack cards, stickers and posters and mounted large placards at the Lanark and Perth arenas, the Perth and District Indoor Swimming Pool and the Stewart Park Festival.



# PERTH AND DISTRICT COMMUNITY FOUNDATION STRATEGIC PLAN 2023-2026

## Purpose

Perth and District Community Foundation grows and strengthens community so that everyone belongs and thrives, today and in the future.

## Guiding Values

- Integrity (respect, trust, transparency)
- Community (connection, collaboration, continuity)
- Diversity (inclusion, equity, justice)

## Roles

- Community Building
- Fund Development
- Granting for Impact

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## STRATEGIC DIRECTION

### Community Building

PDCF will connect diverse groups of people and organizations to help build and strengthen community.

### Granting for Impact

PDCF will make impactful grants to support local organizations, helping build and strengthen community.

### Fund Development

PDCF will foster and broaden its donor base, wisely manage donations, and continue to responsibly grow the total endowment, focusing on an increase in unrestricted funds, to help build and strengthen community.





**Help your  
community thrive**



**Donate to PDCF's  
Community Granting Fund**

**Through community grants, collaboration and capacity building, PDCF supports local organizations whose work benefits the communities of Perth, Lanark Highlands, Tay Valley and Drummond North Elmsley Townships.**



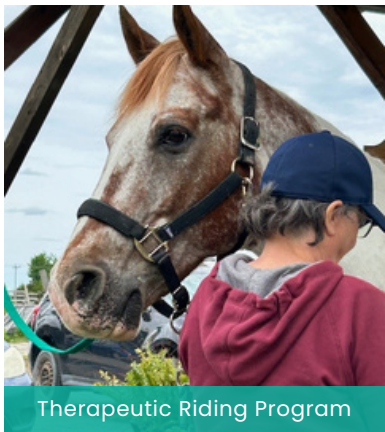
Lanark County Interval House



Planet Youth Lanark County



Lanark Highlands Library



Therapeutic Riding Program



Lanark County Basic Income Network



Climate Network Lanark



77 Gore St E, unit 1A, Perth, ON, K7H 1H8  
613-326-0295 | info@pdcf.ca