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Issue No. 7 • September 2011

Chair's Report



As Chair of The Foundation Board of Directors I am pleased to report that we continue to experience a positive year for funding income and an increase in our community grants and global disaster relief assistance. The Board members and staff are working hard to deliver on our strategic plan. In October the Board will conduct an annual planning session to review our successes and to plan for the next year.

I am pleased to report that the Japanese tsunami disaster relief initiative through The Foundation's CanHelp program realized \$44,278. Recently, The Foundation launched CanHelp to assist the Horn of Africa respond to the drought and famine conditions in some African countries. The

Foundation has made an initial contribution of \$5,000.

Our Golf Classic and Culinary Experience held in June in the Niagara region was a great success with 160 golfers and 20 foodies doing their thing. This year we were pleased to have celebrity chef Michael Olson host our culinary events at Niagara College. These two events realized \$50,000 to assist with the charitable work of The Foundation. I want to take this opportunity to thank the CYL volunteers who assisted our staff to make the June events so enjoyable. We thank all of our sponsors for their continuing support.

We continue to receive contributions from credit union golf tournaments being held across the province. This year we received \$8,000 and express our appreciation to contributors.

The Foundation – YOUR GIVING PARTNER - welcomes \$50 personal memberships and lifetime memberships of \$500. By increasing our membership and working together with Ontario's credit unions, we can make a world of difference and continue to champion community building.

Earl G. Campbell - Chair of the Board

Meridian's Laura Daly Nominated by Chatelaine Magazine



Meridian's own **Laura Daly, Manager, Sponsorship & Event Marketing**, has been short-listed as one of Chatelaine's top 10 women of the year. Laura is being recognized for her volunteer work with her non-profit organization GetRecD Events (www.getrecd.org).

GetRecD Events started 8 years ago, created by Laura and her brother Ryan, to get family and friends together for a round of golf while raising funds to support kids with cancer. Ironically, in their 4th year, Ryan was diagnosed with Leukemia at the age of 27 and sadly, he lost his battle in 2008 at the age of 29.

Laura continued with GetRecD events and to date has hosted over 2000 participants at many of their recreational and special events and has donated over \$150,000 DIRECTLY to cancer patients. What makes GetRecD special is, no funds go through associations, they go directly to the cancer patients, to assist them during their battles.

OCUCF congratulates Laura on her nomination.

MISSION

Partnering in the support of education, healthcare and poverty relief. Providing international development and disaster recovery.

Events Supporting the Foundation

**September 18-20,
CUMA Conference**

Queens Landing, Niagara on the Lake (Believe It, Achieve It)

**November 2-4, Central 1
Conference & Trade Show
& Foundation Silent Auction**

Westin Harbour Hotel, Toronto

**November 16-18,
CUPA Conference**

Toronto Hilton Hotel

Proud sponsor of this newsletter:



2011 Golf and Culinary Classic Raises \$45,000

With increased participation this year (160+ golfers and 20 cooks) we are pleased to announce that the Foundation increased revenue by 50% over last year.

CUMIS Insurance as our Title Sponsor provided their staff to support the days' activities including the hole-in-one Contest, which is very much appreciated. CUMIS has been a major supporter of this annual event from inception and to date we have raised \$750,000 since 1991.

A portion of these funds are allocated to support the Co op Young Leaders Program, sending kids to camp. It is at CYL that our youth learn the strengths of cooperation, what credit unions are all about and how their choices can impact their lives in a very positive way. The hole-in-one contest was a welcomed opportunity for all golfers however this year we didn't have anyone successfully meet the challenge.

Our Culinary Classic cooks were pleasantly surprised to find Michael Olson, Chef, Educator, Writer, and TV personality take the lead in the preparation of a gourmet menu. Feedback indicated this year was the best cooking class ever!



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The Benefit Lady – Sharon Wilson
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Organizing a Giving Circle

Seventh of a series of articles by Penny Rintoul of RZCD Law LLP

In this article, we will move away from the focus on the methods of planned giving which have occupied the previous six articles, and consider another method of getting more “bang for the buck” with one’s giving: organizing a giving circle.

In their simplest form, a giving circle is simply a group of people who decide to pool their donations and decide collectively on what charities to support and how. They can be informal (a small group of neighbours, say, agreeing to contribute collectively to a chosen charity to enable the group to

make a larger donation than any of them could individually) or formal (organized with legal agreements and requiring substantial contributions over several years).

The advantages of this are several:

1. The group, by making a larger donation and focusing on a particular objective, can have more influence than any one member of the group could have individually.
2. Many heads are better than one. A well-balanced group can bring different skills and experience to the process of deciding on the charities which will receive donations, and how best to make those donations.
3. The group can build a true partnership with the charities they support.
4. The social interaction is fun!

There are many resources available to provide information on how to organize and run an effective giving circle. If you are considering this and need some assistance, please contact the Foundation.

Federal Government Provides Matching Funding in Support of African Drought

As we all have heard in recent news, entire crops have failed in East Africa leaving many thousands dead and millions without proper food and water. This is a famine of immense proportions. The Federal Government has announced that it will provide matching funding for donations to this cause until the end of August. The Foundation has made a donation of \$5,000 through the Canadian Red Cross on your behalf.

In Memoriam

If you have experienced the passing of a loved one or close business associate, instead of sending flowers, give a more lasting gift of a donation to the Ontario Credit Union Charitable Foundation.

We’ll send a letter of condolence to the family on your behalf and they’ll know you cared. Just call us or send details of the address of the family member you wish to receive the card and we’ll take care of the rest.

Foundations’ CanHelp Program Aids Goderich Disaster Relief

Our CanHelp Program is available for credit unions to participate at the branch level. We are excited to announce that most recently the CanHelp Program has been launched in order to collect funds for disaster relief in Goderich, in partnership with the Advisory Council for Smaller Asset Size Credit Unions. Donations can be made through these partner credit unions, or through our web site at www.ontariocucf.ca/donate/online_donation.

Tax receipts will be provided to individual donors for any amount \$10 and above.

The CanHelp information and donation tracking page can be downloaded at www.ontariocucf.ca/programs/Disaster.

In addition, individual credit unions have been remitting corporate donations to the Foundation.

Please consider a donation!!

***Note re: Japan Relief Campaign:**

Tax receipts for those who participated in the Japan relief program have been mailed out and should be received within the next few days.

Foundation Supports International Year of Co-operatives through On Co-op Program

Part of what your Foundation does to promote co-operative ideals is to support International Year of Co-operatives. In partnership with Your Credit Union in Ottawa, we provided matching funds for a Co-op Crocs Youth Challenge contest. The idea is to have the first round of this contest run from the summer of 2011 until April 2012. During this time, students and CYL campers will be encouraged to submit a 2-5 minute proposal on video to explain why their Co-op enterprise deserves to receive start up seed money. The selected top 4 participants will be invited to attend the 2012 On Coop Gala in October where they will present to a panel of experts.

If you would like information about this challenge, please contact Kerr Smith at Ontario Co-operative Association; phone 519-763-8271 ext. 29; email: Kerr@ontario.coop

Foundation Supports International Women's Mentorship Program

This is a professional development program that enables women credit union managers to visit Ontario through the efforts and funding of CCA/CDF and OCUCF. The ladies participate in classroom training for 14 days then on location with a participating credit union for 10 days. The Foundation is pleased to continue its partnership with CC/ACDF in this important international program.



Pictured at left is Tony Niessen, Dave Schurman and Aurea de Ramayo.

First Ontario Credit Union in Hamilton hosted Aurea de Ramayo who calls the Philippines home. Aurea has been involved in the financial

co-operative system for over 20 years and is hoping to learn the most effective credit management practices in Canada as well as to acquire strategies and practices in effective credit union operations.

Fundraising Through In-house or public events

A number of leading credit unions of all sizes engage in fund raising for charity through in-house or public events. Credit union staff operate in-branch bake sales or craft shows which include the purchase of tickets to win your favourite items while others operate annual golf tournaments which support the Charitable Foundation. Staff involvement in supporting the Foundation or your favourite community charity not only enhances team spirit amongst your employees, it also raises your profile in the community as being more than just a financial co-operative. Caring about others is very much what credit unions were created for. Fund raising creates a rallying point that makes working at the credit union just that much more enjoyable. As an additional reference, anyone wishing to have a copy of the Foundation's Model Donations Policy should refer to section www.ontariocucf.ca/donate of our website.

Foundation's New Address and Phone Number

Please be advised that your Foundation has relocated to an office tower in Stoney Creek. Our address and phone number have changed. Please update your records to reflect the following contact information for Tony and Devon;

**1100 South Service Road, Suite 220
Stoney Creek, ON L8E 0C5
New phone number 289-335-1152
Fax has not changed 905-592-984**

2011 Silent Auction Appeal

The 2011 Charitable Foundation Silent Auction will be held in November at the Central 1 Fall Conference and Trade Show at the Westin Harbour Castle in Toronto from November 2-4th.

Please help support the Silent Auction by donating cash or gifts in value of \$75 or greater. Your generous donations will help us fund community and charitable organizations across Ontario and credit union development internationally.

2011 Silent Auction Appeal Donation Form

Credit Union/Company Name

Contact Name, Title

Telephone No.

Description of item

Estimated retail value \$

- OR -

Cash Donation in the amount of \$

Mail cheque

or

Debit account no. _____

Central 1 Credit Union

Please fax or mail your completed form to:

Attn: Devon Rowan

1100 South Service Road, Suite 220

Stoney Creek, ON L8E 0C5

Fax: 905-592-9844

Questions? Call Tony or Devon at 289-335-1152

Your 2011 OCUCF Board of Directors:

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Executive, Retired

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EVP & COO, FirstOntario Credit Union

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Strategic Account Manager, CUMIS

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Deanna Basso/Director

Marketing Coordinator, HMECU

Tim Bossence/Director

CEO, Retired

Mark Ventry/Director

Membership & Communications
Manager, On Co-op

George De La Rosa/Director

CEO, Luminus Credit Union

Directors Emeritus

Tim Dauphinee

Retired Scientist

The Ontario Credit Union Charitable Foundation

1100 South Service Rd., Suite 220

Stoney Creek, ON L8E 0C5

Executive Director:

Tony Niessen

1-289-335-1152 ext. 231

tony@ontariocucf.ca

Foundation Administrator:

Devon Rowan

1-289-335-1152 ext. 230

devon@ontariocucf.ca

Fax: 1-905-592-9844

www.ontariocucf.ca

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