

Finding Aid : **GA 218**  
Kitchener and Waterloo Community  
Foundation fonds : accruals.

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## GA 218 : Kitchener and Waterloo Community Foundation

**Kitchener and Waterloo Community Foundation fonds : accruals.** - [19--]-2010. - 2.45 m of textual records and other materials.

*Accrual consists of textual, graphic, and other materials relating to the operations, activities, personnel and events of the Kitchener and Waterloo Community Foundation. Includes financial records, committee information, executive director files, board of directors' files and information, clippings, promotional material, publications, videocassette and sound records, electronic files and other ephemera. Most textual materials were loose when donated.*

*Arranged in series as follows: Series 2. Board of Directors ; Series 3. Board of Directors : Minute Books ; Series 5. Committees : Minutes ; Series 6. Financial Files ; Series 7. Financial Statements ; Series 10. Executive Director's Files ; Series 11. Executive Director's Conferences, Workshops, Seminars ; Series 12. Presentations and Speeches ; Series 13. Annual Reports ; Series 14. Newsletters ; Series 15. Promotion, Ephemera ; Series 16. Clippings ; Series 17. Historical and Topical ; Series 18. Electronic Files ; Series 19. Photographs ; Series 21. Sound Recordings ; Series 22. Video Recordings ; Series 24. Vital Signs.*

*Titled based on content of the fonds.*

*The extent is measured in linear metres of shelf space occupied by the accrual.*

*Also includes 122 photographs, 3 negatives, 1 slide, 23 videocassettes, 1 DVD, 1 computer disk, 2 CD-ROM, 1 CD.*

*Accruals were donated in 2008-2011 by KWCF.*

*The series structure follows that of the original Finding Aid, so not all series numbers appear.*

*Some files restricted.*

*Detailed finding aid available*

*Related records can be found in GA 161.*

### Series 2 : Board of Directors

**Board of Directors.** - 1992-2004. - 9 cm of textual records.

*Contents: series consists of materials related to the Board of Directors of the Kitchener and Waterloo Community Foundation and their activities and duties. Includes manuals, handbooks, and member information including appointments and resignations.*

*Series is arranged alphabetically, then chronologically.*

*Some files restricted.*

File 1 **Board members' handbook, 2004.** - 2004.

*Contents: file consists of one "Board Member's Handbook: a board members' handbook for the Kitchener and Waterloo Community Foundation, 2004." Handbook is divided into 16 sections: 1. Background, 2. Enabling Documents, 3. Vision and Mission, 4. By-laws, 5. Governance Model, 6. Organizational Structure, 7. Strategic Plan, 8. Policies, 9. Role of the Board, 10. Board List, 11. Committees, 12. Special Projects, 13. Agreements and Contracts, 14. Community Foundations of Canada, 15. Management and Administrations, 16. Board Meeting Minutes and Agendas. Some parts of the manual have been annotated.*

File 2 **Board of Directors, 1999-2000.** - 1999-2000.

*Contents: file consists of one package given to the Board of Directors of 1999-2000. Includes list of members, committees, funds, and administrative information on KWCF. From original file folder.*

File 3 **Board of Directors information.** - 1997-2001.

*Contents: file consists of information created or accumulated by the Board of Directors. Includes correspondence, minutes, notes, etc. From original file folder. Restricted. Some items marked "confidential."*

File 4 **Board of Directors manual.** - 1992-2001.

*Contents: file consists of one Board of Directors manual, maintained in a binder, subdivided by category. Includes memberships lists for the board of directors and past boards, as well as committees; local foundation and media contacts; minutes from board of director meetings; and company information including the act of incorporation, by-laws and the strategic plan.*

*From original file folder.*

*Originally in a binder.*

- File 5           **Governance.** - 1999, 2006.  
                   *Contents: file consists of previous meeting materials regarding governance. Includes by-laws, policies, and resolutions.*
- File 6           **Honorary directors.** - 1994-1999.  
                   *Contents: file consists of correspondence and resolution regarding the appointment of honorary directors to the Board of Directors for KWCF.*  
                   *From original file folder.*  
                   *Restricted. Some items marked "confidential."*
- File 7           **New board member orientation binder.** - 2004.  
                   *Contents: file consists of one manual for new board members, divided by tabs into sections: 1. Board of Directors, 2. Role of Directors, 3. Committee Terms of Reference, 4. Act of Incorporation, 5. Planning. Also includes an annotated agenda for the new board member orientation meeting.*  
                   *From original file folder.*  
                   *Originally in binder.*
- File 8           **Resignation letters.** - 2000-2008.  
                   *Contents: file consists of letters of resignation from members of the Board of Directors.*  
                   *Restricted.*

### **Series 3 : Board of Directors : Minute Books**

- Board of Directors : minute books.** - 2000-2004. - 9 cm of textual records.  
                   *Contents: series consists of Board of Directors minute books from 2000-2004.*  
                   *Includes minutes and supporting documents including correspondence, publications, committee information, government acts, memorandum, and financial information.*  
                   *Series is arranged chronologically.*  
                   *Some files restricted.*
- File 9           **Board of Directors.** - 2000.  
                   *Contents: file consist of one minute book of the Board of Directors of KWCF. Includes minutes and supporting documents including correspondence, publications, committee information, memorandum and financial documents.*  
                   *Originally in three ring binder labeled "KWCF Minute Book: 2000."*  
                   *Restricted. Some documents "private and confidential."*
- File 10          **Board of Directors.** - 2001-2004.  
                   *Contents: file consists of minutes for meetings of the Board of Directors.*  
                     
                   *Originally in a binder labeled "The KWCF Board of Directors Meeting Minutes: 2001-2004."*
- File 11          **Board of Directors.** - 2003.  
                   *Contents: file consists of minutes for Board of Director's meetings and accompanying documentation. Includes minute notes, agendas, KWCF information and government acts.*

### **Series 5 : Committees : Minutes**

- Committees : minutes.** - [19--]-2007. - 18 cm of textual records.  
                   *Contents: series consists of minutes and related materials for committees of Kitchener and Waterloo Community Foundation. Committees include: Professional Advisor's, Nominating, Fundraising and Public Relations, Operating, Grants, Youth Advisory, Communications, Asset Development and Marketing. Includes minutes, correspondence, member lists, business plans, terms of reference, press releases, etc.*  
                   *Series is arranged alphabetically, then chronologically.*  
                   *Some files restricted.*
- File 12          **Asset Development Committee.** - 2002-2003.  
                   *Contents: file consists of minutes and supporting documentation of the Asset Development Committee.*
- File 13          **Communications Committee.** - 2001.  
                   *Contents: file consists of minutes and supporting documentation of the Communications Committee.*  
                   *Restricted. Some items marked "private".*

- File 14      **Fundraising and Public Relations Committee.** - 1992.  
*Contents: file consists of minutes and supporting documentation of the Public Relations Committee.*
- File 15      **Grants Committee.** - 1997-2004.  
*Contents: file consists of minutes and supporting documentation of the Grants Committee.*
- File 16      **Investment Committee.** - 2006.  
*Contents: file consists of minutes and supporting documentation of the Investment Committee.*
- File 17      **Marketing Committee.** - 2002-2003.  
*Contents: file consists of minutes and supporting documentation of the Marketing Committee.*
- File 18      **Marketing Committee.** - 2002-2004.  
*Contents: file consists of minutes and supporting documentation of the Marketing Committee.*
- File 19      **Marketing Committee.** - 2007.  
*Contents: file consists of minutes and supporting documentation of the Marketing Committee.*
- File 20      **Nominating Committee.** - 1984-1998.  
*Contents: file consists of minutes and supporting documentation of the Nominating Committee.*  
*Restricted. Some files marked "confidential."*
- File 21      **Operating Committee.** - 1995-2000.  
*Contents: file consists of minutes and supporting documentation of the Operating Committee.*  
*Restricted. Some files marked "confidential", includes donor information.*
- File 22      **Professional Advisor's Committee.** - [199-]-2005.  
*Contents: file consists of minutes and supporting documentation of the Professional Advisor's Committee.*  
*From original folder name.*
- File 23      **Professional Advisor's Committee.** - 2006.  
*Contents: file consists of minutes and supporting documentation of the Professional Advisor's Committee.*
- File 24      **Youth Advisory Committee.** - 1998-2000.  
*Contents: file consists of minutes and supporting documentation of the Youth Advisory Committee.*

## **Series 6 : Financial Files**

- Financial files.** - 1990-2001. - 26 cm of textual records.  
*Contents: series consists of financial records of the Kitchener and Waterloo Community Foundation. Includes historical donation and donor gift records.*  
*Series is arranged alphabetically, then chronologically.*  
*Some files restricted.*
- File 25      **Donor gifts.** - 2000-2001.  
*Contents: file consists of financial information for KWCF for 2000-2001. Includes a list of donors with amounts given, as well as financial information for the YMCA/YWCA Endowment Fund.*  
*From original file folder.*  
*Restricted. Contains donor information.*
- File 26      **Grants awarded.** - 1994-2001.  
*Contents: file consists of financial documents relating to grants awarded by KWCF from 1994-2001.*  
*From original file folder.*

- File 27      **Historical donations.** - 1990.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 28      **Historical donations.** - 1991.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 29      **Historical donations.** - 1992.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 30      **Historical donations.** - 1993.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 31      **Historical donations.** - 1994.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 32      **Historical donations.** - 1995.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 33      **Historical donations.** - 1996.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 34      **Historical donations.** - 1997.  
*Contents: file consists of materials relating to donations and use of KWCF funds.  
Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 35      **Historical donations.** - 1998.  
*Contents: file consists of materials relating to donations and use of KWCF funds from  
1998. Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*
- File 36      **Historical donations.** - 1999.  
*Contents: file consists of materials relating to donations and use of KWCF funds from  
1999. Includes donor records, canvasser records, and endowment fund financial records.  
From original file folder.  
Originally in duotang.  
Restricted. Contains donor information.*

File 37      **Historical donations.** - 2000.  
*Contents: file consists of materials relating to donations and use of KWCF funds from 2000. Includes donor records, canvasser records, and endowment fund financial records. From original file folder. Originally in duotang. Restricted. Contains donor information.*

File 38      **Historical donations.** - 2001.  
*Contents: file consists of materials relating to donations and use of KWCF funds from 2001. Includes donor records, canvasser records, and endowment fund financial records. From original file folder. Originally in duotang. Restricted. Contains donor information.*

## **Series 7 : Financial Statements.**

**Financial statements.** - 1980-2009. - 4 cm of textual records.  
*Contents: series consists of financial statements of the Kitchener and Waterloo Community Foundation from 1980-2009. Series is arranged chronologically.*

File 39      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1980.** - 1980.  
*Contents: file consists of financial statements prepared by Thorne Riddell. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 40      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1981.** - 1981.  
*Contents: file consists of financial statements prepared by Thorne Riddell. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 41      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1982.** - 1982.  
*Contents: file consists of financial statements prepared by Thorne Riddell. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 42      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1983.** - 1983.  
*Contents: file consists of financial statements prepared by Thorne Riddell. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 43      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1984.** - 1984.  
*Contents: file consists of financial statements prepared by Thorne Riddell. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 44      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1985.** - 1985.  
*Contents: file consists of financial statements prepared by Thorne Riddell. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 45      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1986.** - 1986.  
*Contents: file consists of financial statements prepared by Thorne, Ernst & Whinney. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 46      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1987.** - 1987.  
*Contents: file consists of financial statements prepared by Thorne, Ernst & Whinney. Originally in file folder titled "Audited Financial Statements 1980-1989".*

File 47      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1988.** - 1988.  
*Contents: file consists of financial statements prepared by Thorne, Ernst & Whinney. Originally in file folder titled "Audited Financial Statements 1980-1989".*

- File 48      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1989.** - 1989.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 49      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1990.** - 1990.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 50      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1991.** - 1991.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 51      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1992.** - 1992.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 52      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 1994.** - 1994.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 53      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2000.** - 2000.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 54      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2002.** - 2002.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 55      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2003.** - 2003.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 56      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2004.** - 2004.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 57      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2006.** - 2006.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 58      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2007.** - 2007.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 59      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2008.** - 2008.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*
- File 60      **Financial statements of the Kitchener and Waterloo Community Foundation, year ended Dec. 31, 2009.** - 2009.  
*Contents: file consists of financial statements prepared by KPMG.  
Originally in file folder titled "Audited Financial Statements 1980-1989".*

## Series 10 : Executive Director's Files

**Executive director's files.** - 1993-2003. - 22 cm of textual records. - 1 computer disk ; 10 x 9 cm.

*Contents: series consists of files created or accumulated by the Executive Director of Kitchener and Waterloo Community Foundation. Includes information on awards, charity information, office files, financial files, business plans, etc.*

*Series is arranged alphabetically, then chronologically.  
Some files restricted.*

File 61 **Affordable housing challenge results.** - 2001.

*Contents: file consists of materials created by the City of Waterloo regarding affordable housing in the region. Includes the results of the affordable housing challenge, affordable housing task force appointments, terms of reference, an affordable housing challenge kit, and memoranda.*

File 62 **Affordable housing foundation.** - 2002-2004.

*Contents: file consists of materials relating to the affordable housing foundation and other housing and homelessness concerns. Includes articles, meeting agendas, brochures on housing and heating financial help.*

*From original file folder.*

File 63 **Arts stabilization.** - 2001-2004.

*Contents: file consists of materials relating to arts stabilization in Waterloo as well as other cities in Canada. Includes correspondence, notes, plans from other communities, and minutes from a meeting of the Waterloo Regional Arts Council.*

*From original file folder.*

File 64 **Business marketing plan.** - 2001.

*Contents: file consists of draft marketing plans for KWCF.*

*From original file folder.*

*Restricted. Some items marked "confidential."*

File 65 **Canadian Directory to Foundations & Grants.** - 2001.

*Contents: file consists of a questionnaire for KWCF to be filled out for the Canadian Directory to Foundations & Grants.*

*From original file folder.*

File 66 **Council meeting, 2002-2003.** - 2002-2003.

*Contents: file consists of two leaves relating to the planning of the 2002 and 2003 council meeting.*

File 67 **Diversity.** - 1998-1999. - 1 computer disk ; 10 x 9 cm.

*Contents: file consists of information regarding diversity in both the KWCF workplace and the greater community. Includes an information package on diversity in the workplace, a meeting agenda, a profile of immigrants in Waterloo Region, and a diskette featuring a powerpoint presentation on diversity.*

*From original file folder.*

File 68 **Draft business plans.** - 2000.

*Contents: file consists of one draft business plan and one draft marketing plan for KWCF.*

File 69 **Executive director information.** - 1998-1999.

*Contents: file consists of materials related to the KWCF's search for a new executive director, and the appointment of Rosemary Smith to the position. Includes correspondence, advertisements, and a copy of Rosemary's CV.*

*From original file folder.*

File 70 **Grants stabilization.** - 2003.

*Contents: file consists of materials relating to grant stabilization for KWCF. Includes correspondence and financial materials.*

*From original file folder.*



- File 71      **Investment Committee.** - 1999-2000.  
*Contents: file consists of materials related to the Investment Committee. Includes memorandum, correspondence, and and information regarding investments. Restricted. Contains investment information.*
- File 72      **Kitchener Waterloo - Our Millennium.** - 1999.  
*Contents: file consists of materials relating to the Our Millennium campaign in Kitchener Waterloo. Includes newspaper clippings, correspondence, meeting minutes, a brochure and notes.  
From original file folder.*
- File 73      **Leave a legacy.** - 1998-1999.  
*Contents: file consists of materials related to Leave a Legacy, Waterloo-Wellington. Includes correspondence and information on the Leave and Legacy program.  
From original file folder.*
- File 74      **Misc. documents.** - 2001-2006.  
*Contents: file consists of miscellaneous documents created and accumulated by staff at KWCF. Includes correspondence, primarily with other community organizations; information on the engage campaign; letters of recommendation for broadcast license renewals; and others.  
From original file folder.*
- File 75      **North-Waterloo Elderly Persons Homes Ltd.** - 1999.  
*Contents: file consists of one letter to Jane Humphries from Sims Clement Eastman re. the North-Waterloo Elderly Persons Homes Ltd. as well as supporting documentation on the history of the organization.*
- File 76      **Ontario Arts Council Foundation endowment fund.** - 1998-1999.  
*Contents: file consists of correspondence and supporting materials relating to the Ontario Arts Council Foundation endowment fund, and its impact on the K-W Symphony as well as Theater Ontario.  
From original file folder.*
- File 77      **Ontario Securities Commission.** - 1999-2006.  
*Contents: file consists of correspondence from Gowling, Starthy & Henderson Barristers and Solicitors regarding KWCF funds and the Ontario Securities Commission.  
From original file folder.  
Restricted. Some files marked "private and confidential."*
- File 78      **Opportunities.** - 1999-2006.  
*Contents: file consists of materials relating to the Opportunities Waterloo Region campaigns. Includes information packages and brochures.  
From original file folder.*
- File 79      **Quarry communications.** - 1993-2004.  
*Contents: file consists of materials relating to the KWCF's relationship with Quarry Integrated Communications. Includes correspondence, advertisement drafts, notes, and the February 1993 issue of Exchange magazine featuring an article on Quarry.  
From original file folder.*
- File 80      **Strategic planning.** - 2000-2002.  
*Contents: file consists of materials relating to strategic planning for KWCF.*
- File 81      **Town hall, 2000.** - 2000.  
*Contents: file consists of one invitation to the 2000 town hall.*
- File 82      **Town hall, 2001.** - 2001.  
*Contents: file consists of materials relating to the planning and execution of the 2001 town hall. Includes an invitation, programmes, and a speech.*
- File 83      **Town hall, 2002.** - 2002.  
*Contents: file consists of one materials relating to the planning and execution of the 2002 town hall. Includes a letter from Brice Balmer of House of Friendship to Rosemary Smith re. town hall forum, two draft programmes, an invitation, and an attendance list.*
- File 84      **Town hall, 2003.** - 2003.  
*Contents: file consists of one invitation to the 2003 town hall.*

- File 85      **United Way.** - 1998-1999.  
*Contents: file consists of materials related to United Way and to KWCF's financial support of the organization. Includes correspondence, information on the United Way, and legal documents including a lease and by-laws.  
 From original file folder.  
 Restricted. Some items marked "confidential."*
- File 86      **Waterloo Regional Arts Foundation & Awards.** - 2001-2002.  
*Contents: file consists of information regarding the Waterloo Regional Arts Foundation & Awards. Includes minutes of the advisory committee, by-laws, and other documents.  
 From original file folder.*
- File 87      **Waterloo Regional Funders Alliance.** - 1999-2001.  
*Contents: file consists of information on the Waterloo Regional Funders Alliance.  
 Includes correspondence, as well as a report to the alliance.  
 From original file folder.*
- File 88      **Waterloo Wellington Community Philanthropic Awards.** - 2001-2002.  
*Contents: file consists of information regarding the Waterloo Wellington Community Philanthropic Awards. Includes correspondence, award information and brochures.*
- File 89      **Wilmer Shields Rich Awards.** - 1993-2008.  
*Contents: file consists of information on the Wilmer Shields Rich Awards for Excellence in Communications. Includes applications by KWCF, correspondence, information on the award, and KWCF grading.  
 From original file folder.*
- File 90      **Yearly events and projects.** - 2002.  
*Contents: file consists of one memorandum regarding events and projects that KWCF holds on annual basis.*

**Series 11 : Executive Director's Conferences, Workshops, Seminars**

- Executive director's conferences, workshops, seminars.** - 2003. - 1 cm of textual records.  
*Contents: series consists of one file of materials related to a visioning session held by Kitchener and Waterloo Community Foundation.  
 Series is arranged alphabetically, then chronologically.*
- File 91      **Visioning sessions.** - 2003.  
*Contents: file consists of materials relating to visioning sessions held by KWCF.*

**Series 12 : Presentations and Speeches**

- Presentations and speeches.** - 2002-2004. - 1 cm of textual records.  
*Contents: series consists of presentations and speeches given by employees of Kitchener and Waterloo Community Foundation as well as other members of the greater K-W community. Includes speeches by Charles Ormston, Ken Murray, Rosemary Smith, David Graham, Doug Letson and Susan Saunders Bellingham.  
 Series is arranged alphabetically, then chronologically.*
- File 92      **Presentations.** - 2002-2004.  
*Contents: file consists of transcripts of speeches from two presentations: one a presentation to Clarica Kitchener Agency, and one on the donation of the KWCF's materials to the University of Waterloo Archives.*
- File 93      **State of the City address.** - 2004.  
*Contents: file consists of one speech given by Charlie Ormston at the State of the City Address and Charity Breakfast, which supports KWCF. Also includes an invitation to the event and a thank you card.*
- File 94      **Town hall meeting.** - 2004.  
*Contents: file consists of bound transcripts from speeches given at the 2004 town hall meeting. Includes speeches by Charles Ormston, Ken Murray, Rosemary Smith, David Graham, Doug Letson, and Susan Saunders Bellingham.  
 Spiral bound.*

### **Series 13 : Annual Reports**

**Annual reports.** - 2003-2007. - 3 cm of textual records.

*Contents: series consists of Annual Reports of Kitchener and Waterloo Community Foundation from 2003-2007.*

*Series is arranged chronologically.*

File 95 **Annual report, 2003.** - 2003.

File 96 **Annual report, 2004.** - 2004.

File 97 **Annual report, 2005.** - 2005.

File 98 **Annual report, 2006.** - 2006.

File 99 **Annual report, 2007.** - 2007.

### **Series 14 : Newsletters**

**Newsletters.** - 1997-2010. - 3 cm of textual records.

*Contents: series consists of newsletters published by Kitchener and Waterloo Community Foundation. Includes copies of President's letters, Encounters, and KWCF Update.*

*Series is arranged alphabetically, then chronologically.*

File 100 **Encounters, Fall 2004.** - 2004.

File 101 **Encounters, Fall 2005.** - 2005.

File 102 **Encounters, Fall 2006.** - 2006.

File 103 **Encounters, Fall 2007.** - 2007.

File 104 **Encounters, Fall 2008.** - 2008.

File 105 **Encounters, Fall 2009.** - 2009.

File 106 **KWCF update, Aug. 2005.** - 2005.

File 107 **KWCF update, Sept. 2005.** - 2005.

File 108 **KWCF update, Feb. 2006.** - 2006.

File 109 **KWCF update, Aug. 2006.** - 2006.

File 110 **KWCF update, Mar. 2007.** - 2007.

File 111 **KWCF Update, Aug. 2007.** - 2007.

File 112 **KWCF update, Feb. 2008.** - 2008.

File 113 **KWCF update, June 2008.** - 2008.

File 114 **KWCF update, Aug. 2008.** - 2008.

File 115 **KWCF update, Aug. 2009.** - 2009.

File 116 **KWCF update, Feb. 2010.** - 2010.

File 117 **KWCF update, Aug. 2010.** - 2010.

File 118 **President's letter, Sept. 1997.** - 1997.

File 119 **President's letter, Mar. 1998.** - 1998.

File 120 **President's letter, Sept. 1998.** - 1998.

File 121 **President's letter, July 1999.** - 1999.

## Series 15 : Promotion, Ephemera

**Promotion, ephemera.** - [19--]-2009. - 17 cm of textual records.

*Contents: series consists of materials relating to the promotion of Kitchener and Waterloo Community Foundation, as well as ephemera. Includes clippings, articles, advertisements, and miscellaneous ephemera.*

*Series is arranged alphabetically, then chronologically.*

- File 122      **3rd annual volunteer family picnic.** - 2003.  
*Contents: file consists of one invitation to the 3rd Annual Volunteer Family Picnic.*
- File 123      **Advisor's Edge.** - 2007.  
*Contents: file consists of an issue of Advisor's Edge which includes information about KWCF.*
- File 124      **Advocate, May 2005.** - 2005.  
*Contents: file consists of an issue of The Chamber Advocate from May 2005 which features information on the KWCF.*
- File 125      **Annual report : Community Foundations of Canada.** - 2004.  
*Contents: file consists of the 2004 annual report of the Community Foundations of Canada which features an article on the KWCF.*
- File 126 OVR      **Awards & certificates.** - 1996-2006.  
*Contents: file consists of awards and certificates given to KWCF by other community organizations.  
From original file folder.  
One oversize item.*
- File 127      **A brief overview of community foundations.** - [19--].  
*Contents: file consists of information regarding community foundations and how they are ran.*
- File 128      **Brochure.** - [19--].  
*Contents: file consists of one brochure detailing information about KWCF.*
- File 129      **Brochure discussion.** - 2002.  
*Contents: file consist of notes from a discussion on KWCF brochures.*
- File 130      **Business cards.** - [20--].  
*Contents: file consists of two business cards for Rosemary Smith, CEO of KWCF.*
- File 131      **Business Excellence Awards.** - 2007.  
*Contents: file consists of a programme from the 2007 Business Excellence Awards.*
- File 132      **Business Times, Jan. 2009.** - 2009.  
*Contents: file consists of one copy of the Business Times from Jan. 2009, containing an interview with Rosemary Smith, CEO of KWCF.*
- File 133      **The Chamber Advocate, Aug. 2006.** - 2006.  
*Contents: file consists of one copy of The Chamber Advocate, published by the Greater Kitchener Waterloo Chamber of Commerce from Aug. 2006. Includes a feature on WRIEN, of which Rosemary Smith is on the steering committee.*
- File 134      **Charitable Giving Directory.** - 2007.  
*Contents: file consists of an issue of the Charitable Giving Directory for Winter 2007 which lists the KWCF.*
- File 135      **Charitable organizations endowment forms.** - 2001.  
*Contents: file consists of materials regarding charitable giving, endowments, and community foundations.  
From original file folder.*
- File 136      **Community Foundations of Canada : Bulletin.** - 2004.  
*Contents: file consists of an issue of the Bulletin of the Community Foundations of Canada from March 2004 which features KWCF.*

- File 137      **Connections.** - [20--].  
*Contents: file consists of one information booklet about KWCF titled "Connections".*
- File 138      **Engage! brochure.** - [20--].  
*Contents: file consists of one brochure for the engage! campaign of KWCF.*
- File 139      **Exchange, June 2003.** - 2003.  
*Contents: file consists of an issue of Exchange from March 2003 which features an article on charitable legacy giving.*
- File 140      **Exchange, June 2005.** - 2005.  
*Contents: file consists of an issue of Exchange from June 2005 which features an article on KWCF.*
- File 141      **Exchange, May 2004.** - 2004.  
*Contents: file consists of an issue of Exchange from May 2004 which features an article on Mac Voisin, who works with KWCF.*
- File 142      **Grand, Feb. 2006.** - 2006.  
*Contents: file consists of an issue of Grand magazine which features an article on KWCF.*
- File 143      **Helping advisors focused on donor philanthropy.** - [19--].  
*Contents: file consists of information regarding philanthropy and estate planning.*
- File 144      **How to help your clients achieve their charitable goals by listening for opportunities.** - [19--].  
*Contents: file consists of information regarding planning charitable giving.*
- File 145      **How to use a community foundation.** - 2007.  
*Contents: file consists of an information package on community foundations.*
- File 146      **Information kit.** - 2001.  
*Contents: file consists of one information kit on KWCF. Includes spiral bound book with examples of donation kinds, pamphlets, information sheets about KWCF, and a cheque requisition form.*  
*Spiral bound.*
- File 147      **K-W Arts Awards.** - 2006.  
*Contents: file consists of the programme for the 2006 KW arts awards, as well as an article from the K-W Record, both of which feature the KWCF.*
- File 148      **Kisses From Above / written by Susan Devenyi / illustrated by Paula White-Diamond.** - 2004.  
*Contents: file consists of one copy of a children's book titled "Kisses From Above".*
- File 149      **The Kitchener and Waterloo Community Foundation.** - [19--].  
*Contents: file consists of two leaves giving information about the KWCF.*
- File 150      **KWCF : Amy Hallman Snyder Award brochure.** - [19--].  
*Contents: file consists of one brochure advertising the fund for the Amy Hallman Snyder award at the Ontario Juried Quilt Show.*
- File 151      **KWCF : Anselma House brochure.** - [19--].  
*Contents: file consists of one brochure for the fund for Anselma House, a shelter for abused women and their children.*
- File 152      **KWCF - discover the difference.** - [19--].  
*Contents: file consists of two leaves with information about KWCF and how donations are used.*
- File 153      **KWCF: the ideal philanthropic option that lasts forever.** - [20--].  
*Contents: file consist of a marketing sheet that details that advantages of donating to KWCF versus a private foundation.*

- File 154 **Leadership Waterloo Region : alumni.** - 2001-2022.  
*Contents: file consists of two booklets from Leadership Waterloo featuring alumni of the program. KWCF is listed in each as a founding partner of the organization.*
- File 155 **Logo sheet.** - 1994.  
*Contents: file consists of a sheet of logos for KWCF showing their "ten years of giving" logos. Logo sheet typeset and printed by Denison's.*
- File 156 **Media.** - 1973-2004.  
*Contents: file consists of media and press releases for KWCF as well as newspaper clippings and photocopies of newspaper articles.*
- File 157 **Media.** - 1993-2004.  
*Contents: file consists of press releases, a media contact sheet and public relations/media plans.  
From original file folder.*
- File 158 **The Record, Aug. 3, 2002.** - 2002.  
*Contents: file consists of one broadsheet from The K-W Record Aug. 3, 2002, detailing the financial information of KWCF.*
- File 159 **Record marketing ads.** - 2007.  
*Contents: file consists of passages from the K-W Record showing ads for KWCF.*
- File 160 **Record marketing ads.** - 2008.  
*Contents: file consists of passages from the K-W Record showing ads for KWCF.*
- File 161 **The Record, May 31, 2000.** - 2000.  
*Contents: file consists of one broadsheet from The K-W Record from May 31, 2000 detailing the financial details of the KWCF.*
- File 162 **Rex, Jan. 2009.** - 2009.  
*Contents: file consists of Rex magazine which features an article on the KWCF random act of kindness day.*
- File 163 **SNAP, Nov. 2008.** - 2008.  
*Contents: file consists of an issue of SNAP which features information on the KWCF random act of kindness day.*
- File 164 **Top Notch : profiles in excellence.** - [20--].  
*Contents: file consists of the Top Notch : profiles in excellence publication which features an article on the KWCF.*

## **Series 16 : Clippings**

- Clippings.** - 1973, 2001-2006. - 1 cm of textual records.  
*Contents: series consists of one file of clippings related to Kitchener and Waterloo Community Foundation.  
Series is arranged alphabetically, then chronologically.*
- File 165 **Clippings, 1973, 2011-2006.** - 1973, 2001-2006.  
*Contents: file consists of primarily of clippings and articles relating to the KWCF.*

## **Series 17 : Historical and Topical**

- Historical and topical.** - 1984-2003. - 2 cm of textual records.  
*Contents: series consists of historical and topical materials relating to Kitchener and Waterloo Community Foundation. Includes an information package created by Walter Bean, and biographies and interviews with past-presidents of KWCF.  
Series is arranged alphabetically, then chronologically.*
- File 166 **Biographies and interviews of past-presidents KWCF.** - 2003.  
*Contents: file consists of biographies and interviews of past-presidents of KWCF John Harper, Owen Lackenbauer, Dick Meunier, Ken Murray, Terry Osborne, John Panabaker, Sandra Reid, Jim Robertson and David Uffelmann. Biographies and interviews are separated by tabs.  
From title of binder.  
Originally in three ring binder.*

File 167 **Information kit : Walter Bean.** - 1984.  
*Contents: file consists of one information kit given out by KWCF from the time the foundation was started by Water Bean. Includes a folder, brochures, information on KWCF, and two letters mailed out by Walter Bean, one of which is signed by him.*

### **Series 18 : Electronic Files**

**Electronic files.** - 2000-2001. - 1 CD-ROM (15.5 MB of textual records). - 1 CD-R (36.7 MB of textual records)

*Contents: series consists of electronic files relating to or accumulated by Kitchener and Waterloo Community Foundation. Includes Technology Spotlight on Waterloo and The Cleveland Foundation annual report.*

*Series is arranged alphabetically, then chronologically.*

File 168 **The Cleveland foundation 2000 annual report supplement : funds & grants.** - 2000. - 1 CD-ROM (15.5 MB of textual records)

*Contents: file consists of one CD-ROM with the funds & grants supplement to The Cleveland Foundation's 2000 annual report in one PDF file.*

File 169 **Technology Spotlight.** - 2001. - 1 CD-R (36.7 MB of textual records)

*Contents: file consists of one CD-R containing the 2001 Regional Edition of "Technology Spotlight" in 3 PDF files.*

### **Series 19 : Photographs**

**Photographs.** - [19--]-2006. - 122 photographs : b&w and col. ; 28 x 36 cm or smaller. - 3 negatives : col. ; 35 mm. - 1 slide : col. ; 35 mm.

*Contents: series consists of photographs showing events and personnel of Kitchener and Waterloo Community Foundation. Includes photographs of the Board of Directors, staff, and events.*

*Series is arranged alphabetically, then chronologically.*

File 170 **Board of Directors.** - 1996-1998. - 1 photograph : col. ; 21 x 25 cm.

*Contents: file consist of one group portrait of the KWCF Board of Directors.*

*From original envelope.*

File 171 OVR **Board of Directors and Officers.** - 1994-1995. - 1 photograph : col. ; 28 x 36 cm.

*Contents: contains one photograph of the 1994-1995 Board of Directors and Officers with accompanying plaque.*

*From original envelope.*

*Oversize.*

File 172 OVR **Board of Directors and Officers.** - 1995-1996. - 1 photograph : col. ; 26 x 36 cm.

*Contents: contains one photograph of the 1995-1996 Board of Directors and Officers with accompanying plaque.*

*From original envelope.*

*Oversize.*

File 173 OVR **Board of Directors and Officers.** - 1997-1998. - 1 photograph : col. ; 27 x 35 cm.

*Contents: contains one photograph of the 1997-1998 Board of Directors and Officers with accompanying plaque.*

*From original envelope.*

*Oversize.*

File 174 OVR **Board of Directors and Officers.** - 2003-2004. - 1 photograph : col. ; 28 x 36 cm.

*Contents: contains one photograph of the 2003-2004 Board of Directors and Officers with accompanying plaque.*

*From original envelope.*

*Oversize.*

File 175 **Board of Directors and Officers.** - 2005-2006. - 1 photograph : col. ; 23 x 36.

*Contents: contains one photograph of the 2005-2006 Board of Directors and Officers with accompanying plaque.*

*From original envelope.*

- File 176      **Portrait: Donna Scharlach** - 1999. - 3 negatives : col. ; 35 mm. - 1 slide : col. ; 35 mm.  
*Contents: file consists of three negatives and one slide showing portraits of Donna Scharlach.*  
*From original envelope.*
- File 177      **Portrait: Elaine Averall, office administrator.** - 2000. - 1 photograph : col. ; 13 x 13 cm.  
*Contents: file consist of one portrait photograph of Elaine Averall, office administrator.*  
*From original envelope.*
- File 178      **Portrait: Keith Schantz memorial fund.** - 1990. - 1 photograph : b&w ; 5 x 4 cm.  
*Contents: file consist of one portrait of Keith Schantz glued to a print request form from Denison's.*  
*From original envelope.*
- File 179      **Southwood Secondary School millennium pictures.** - 2000. - 2 photographs : col. ; 10 x 15 cm.  
*Contents: file consist of two photographs showing students from Southwood Secondary School. Note that the pictures appear to show students from an elementary school.*  
*From original envelope.*
- File 180      **Town hall meeting, June 1999.** - 1999. - 91 photographs : col. ; 10 x 15 and 15 x 10 cm.  
*Contents: file consist of photographs showing the 1999 town hall meeting. Includes images of speeches and people socializing. Also includes notes related to the meeting and to the photographs.*  
*From original envelope.*
- File 181      **Untitled.** - [19--]. - 21 photographs : col. ; 26 x 20 cm or smaller.  
*Contents: file consists of twenty photographs from an unknown event showing speakers and people receiving envelopes.*

## **Series 21 :    Sound Recordings**

- Sound recordings.** - 2001. - 1 CD (4 min. 30 sec.)  
*Contents: series consists of one sound recording on CD featuring 30 second radio commercials for KWCF.*  
*Series is arranged alphabetically, then chronologically.*
- File 182      **Community foundations trillium project.** - 2001. - 1 CD (4 min. 30 sec.)  
*Contents: file consists of one CD with nine thirty second radio commercials for the KWCF that were funded by a Trillium grant. The commercials target audiences in Guelph, Cambridge, and Kitchener-Waterloo.*

## **Series 22 :    Video Recordings**

- Video recordings.** - [19--]-2006. - 23 videocassettes : VHS ; 13 mm. - 1 DVD.  
*Contents: series consists of videocassettes and DVDs created and accumulated by Kitchener and Waterloo Community Foundation.*  
*Series is arranged alphabetically, then chronologically.*
- File 183      **African heritage month celebration.** - 2006. - 1 videocassette : VHS ; 13 mm.  
*Contents: file consists of one videocassette along with a thank you card from the African Canadian Association of Waterloo Region.*
- File 184      **Brainstorming session at Quarry Communications.** - 2002. - 1 videocassette : VHS ; 13 mm.
- File 185      **Canadian community foundations : youth in philanthropy.** - 2002. - 1 videocassette : VHS ; 13 mm.
- File 186      **Community foundations as environmental stewards.** - [19--]. - 1 videocassette (ca. 11 min.) : VHS ; 13 mm.  
*Contents: file consists of one videocassette the label of which reads: "Community Foundations as Environmental Stewards 11:31 Council of Michigan Foundations One South Harbor Avenue, Suite 3 Grand Haven MI 49417".*
- File 187      **Fit for children? Waterloo region? : child poverty.** - [19--]. - 1 videocassette (18 min.) : VHS ; 13 mm.



- File 188      **Foundation.** - [19--]. - 1 videocassette : VHS ; 13 mm.
- File 189      **In the midst of plenty.** - [19--?]. - 1 videocassette (28 min.) : VHS ; 13 mm.  
*Contents: file consists of one videocassette with the videos "Isolated and homeless" (13 min.) and "No vacancy: Homelessness in the Waterloo Region (15 min.)."*
- File 190      **K-W community foundation 2000 presentation.** - 2000. - 1 videocassette : VHS ; 13 mm.
- File 191      **K-W community foundation : Walter Bean tribute.** - [19--]. - 1 videocassette : VHS ; 13 mm.  
*Contents: file consists of one videocassette, the label reading: "K-W Community Foundation Walter Bean tribute, produced by CKCO-TV".*
- File 192      **Kid's country club & TVO documentary** - 1999. - 1 videocassette (24 min.) : VHS ; 13 mm.  
*Contents: file consists of one videocassette containing "Kid's country club: video documentary 1999" by T.E. Bourgard productions as well as "TVO documentary"*
- File 193      **KWCF : grants awarded.** - [19--]. - 1 videocassette : VHS ; 13 mm.
- File 194      **Leave a legacy.** - 2000. - 1 DVD (ca. 7 min.)  
*Contents: file consists of one DVD with the KWCF Leave a Legacy Promotional Video.*
- File 195      **Letters, sounds, words.** - [19--]. - 1 videocassette (10 min.) : VHS ; 13 mm.  
*Contents: file consists of one videocassette featuring "Letters, sounds, words". On label " Strong Start- Letters, Sounds, Words. Contacts: Lynda Silvester or Kristin Carr. Concept Now AV Productions and Consulting, Kitchener, On. "*
- File 196      **Living younger: a health promotion program for men and women age 55 and better.** - [19--]. - 1 videocassette (10 min.) : VHS ; 13 mm.  
*Contents: file consists of one copy of "Living younger" as well as a brochure titled "Help yourself to good health" put out by Living Younger.*
- File 197      **O Canada.** - [19--]. - 1 videocassette : VHS ; 13 mm.
- File 198      **Opportunities 2000.** - 2000. - 1 videocassette : VHS ; 13 mm.
- File 199      **Our Millennium : hand in hand.** - [ca. 2000]. - 1 videocassette (4 min.) : VHS ; 13 mm.  
*Contents: contains one videocassette, the label reading: "Our Millennium 'Hand in Hand' video 4 minutes. Our Millennium is an initiative of Canada's Community Foundations."*
- File 200      **The Paul Martin Sr. society: a most honorable legacy.** - [19--]. - 1 videocassette (11 min.) : VHS ; 13 mm.
- File 201      **The power of many.** - 2001. - 1 videocassette (ca. 4 min.) : VHS ; 13 mm.  
*Contents: contains one videocassette titled "The power of many" recorded for the International Year of Volunteers, Volunteer Canada and the Government of Canada.*
- File 202      **The R.R.A.P. program : province wide.** - [19--]. - 1 videocassette : VHS ; 13 mm.
- File 203      **Soliciting major gifts : a guide for volunteers.** - [19--?]. - 1 videocassette : VHS ; 13 mm.  
*Contents: file consists of one videocassette titled "Soliciting major gifts : A guide for volunteers, Deleware", published by Ketchum Canada Inc.*
- File 204      **Tape of news coverage for \$12 million.** - [19--]. - 1 videocassette : VHS ; 13 mm.
- File 205      **Walter Bean community champion profile, Feb. 2004.** - 2004. - 1 videocassette : VHS ; 13 mm.
- File 206      **Winnipeg foundation : legacy of dreams.** - [19--]. - 1 videocassette (ca. 12 min.) : VHS ; 13 mm.

**Series 24 : Vital Signs**

**Vital Signs.** - 2007-2008. - 2 cm of textual records.

*Contents: series consists of the Kitchener and Waterloo Community Foundation publication Vital Signs as well as supplements and updates for the years 2007-2008. Series is arranged alphabetically, then chronologically.*

File 207 **Vital Signs, 2007.** - 2007.

*Contents: file consists of one copy of the 2007 "Waterloo Region's Vital Signs" publication.*

File 208 **Vital Signs, 2008.** - 2008.

*Contents: file consists of two copies of the 2008 "Waterloo Region's Vital Signs" publication.*

File 209 **Vital Signs K-W Record supplement.** - 2007.

*Contents: file consists of one supplement from the K-W Record to the 2007 Vital Signs publication.*

File 210 **Vital Signs update, June 2008.** - 2008.

*Contents: file consists of one copy of the June 2008 update for "Waterloo Region's Vital Signs."*