



Foundation of Greater Montréal

# ANNUAL REPORT **2021**



# Territorial acknowledgement

The Foundation of Greater Montréal (FGM) wishes to highlight the presence of the Kanien'kehá:ka of the Kahnawà:ke and Kanehsatà:ke communities, which have historically been established on the territory now known as Greater Montreal. It wishes to recognize as well that this territory has also been home over time to several Indigenous nations who established themselves here over several historical periods. Today, a diverse Indigenous population, including First Nations, Métis and Inuit individuals, continues to reside on this territory, in socioeconomically varied conditions.

Greater Montreal has long been a place for interaction and exchange among the First Peoples, and is a historic site where the Great Peace of Montreal was signed by 39 First Nations in 1701. In the spirit of peace, justice, and reconciliation, and by drawing inspiration from the ancestral knowledge of the First Peoples, FGM is working to enhance the well-being of the communities of Greater Montreal, and to protect its territory, now and for future generations.

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The Foundation of Greater Montréal (FGM) supports the equality of the sexes and of genders in all of its practices, including its communications. To that end, it utilizes an inclusive writing style. FGM commits itself to gradually adopting rules of communication that further the reduction of inequalities.

**I am very proud to present to you, in my capacity as Chair of the Board of Directors, the Annual Report of the Foundation of Greater Montréal (FGM).**



2021 was yet another atypical year, one more in which life was lived according to the ups and downs of the COVID-19 pandemic. FGM's team – its staff, the Board of Directors and the Board's committees – spared no effort in order to continue to serve the Greater Montreal community, most notably through the development of new partnerships and new ways of doing things. Since 2020, and all throughout the last year, the Foundation has been able to combine reflection, collaboration and action as it responded to the most pressing needs, of course, but also endeavoured to better support the community's recovery, which is gradually taking shape. In that way, it has truly been an embodiment of its raison d'être.

FGM's growth in recent years has been remarkable, but, by definition, that kind of growth does not happen in a vacuum. It is rather the product of multiple encounters, exchanges and partnerships that all contributed to the blossoming of the Foundation as a philanthropic institution, and above all, to its impact on the well-being and development of Greater Montreal and its residents. Naturally, I am thinking of the contributions of the Foundation's donors, without whom none of what we do would be possible, as well as those of all the organizations we have supported throughout the year, and to which our community as a whole owes a debt of gratitude. I also have in mind all our community, philanthropic and governmental partners, with whom we collaborated on many projects over these last few months, and about whom you will read more in the pages that follow.

As a new chapter in FGM's history opens with the implementation of the 2022-2026 Strategic Plan – which our CEO Karel Mayrand will tell you more about on the opposite page – Greater Montreal can more than ever count on a passionate, diversified and determined team, one that is committed to advancing the United Nations' Sustainable Development Goals on its territory and thus contributing to its present and future well-being. The Foundation of Greater Montréal, your foundation, is grateful for your ongoing support in this wonderful adventure. Enjoy this report, and speak to you soon!

**KATHY FAZEL, CFA, ICD.D**  
CHAIR OF THE BOARD OF DIRECTORS  
FOUNDATION OF GREATER MONTRÉAL

**2021 was a major turning point for the Foundation of Greater Montréal, a year in which we initiated a shift aimed at increasing our impact and better reflecting and serving our community.**



Our new Strategic Plan, which will be deployed until 2026, embodies this new approach. In creating it, we involved you in the process. At the close of the most extensive consultation process in the Foundation's history, during which we sounded out, in particular, donors, community organizations, partners, volunteers and staff, we were able to determine the principles and orientations that will guide FGM's actions for the next five years. The Foundation aspires to help create a community that will be free of poverty and discrimination, where all can realize their potential and live in a healthy environment, both today and in the future. To bring this vision to life, we are working to mobilize available philanthropic resources, and make sure they are serving the intelligence, creativity and the quest for solutions that can respond in a tangible way to our community's needs. I naturally encourage you to have a look at the details of the Strategic Plan; it's on our [website](#).

We also believe we have a responsibility to use our resources to contribute to the advancement of the United Nations' Sustainable Development Goals, notably through ecological transition and the protection of our climate, but also through the pursuit of social equity, justice, diversity and inclusion. That is why we have developed a new Responsible Investment Strategy. With this initiative, we will ensure that the Foundation's financial assets will from now on be invested in a way that aligns with our values and contributes to the furthering of our mission. I am very proud that we have adopted this Strategy, which positions FGM as a leader in this area, and I want to thank the members of our team and our partners who participated in its creation.

Indeed, in order to properly fulfill its role, a community foundation like ours cannot go it alone. It has a duty to listen to, and collaborate with, individuals and organizations from all sectors of the community. That kind of interaction has notably enabled us to create and deploy our new Collective Funds. By integrating the principles of trust-based philanthropy into our granting practices, we were able to benefit from the collective wisdom of Greater Montreal's community sector. By building relationships with new partners and including them in our examinations of the most crucial issues we all face, we have expanded our focus and heightened our potential for impact. And in constructing more equal relationships and in transferring power to our partners, we are banking on the idea that it is indeed possible to serve the community in a more just, effective and sustainable fashion.

The Foundation of Greater Montréal, your foundation, has now joined the ranks of the major philanthropic institutions. The high-quality professional services we provide to the community are recognized and appreciated by our partners. But we are nonetheless going to keep reworking and improving our ways of doing things. That is our firm and lasting commitment for the years to come. Once again, I thank you for your support and your trust.

**KAREL MAYRAND**  
PRESIDENT AND CEO  
FOUNDATION OF GREATER MONTRÉAL

# VISION

The Foundation of Greater Montréal has a vision of a community that is free of poverty and discrimination, where all can realize their potential and live in a healthy environment, now and in the future.

# MISSION

The Foundation of Greater Montréal is here to serve and listen to its community. In collaboration with its partners, it mobilizes philanthropic resources, disseminates knowledge, sparks initiatives and supports its community, all with a view to advancing the Sustainable Development Goals (SDGs) in Greater Montreal.

# VALUES

## JUSTICE, EQUITY, DIVERSITY, INCLUSION

Work to eliminate all forms of discrimination. Amplify the voices of underrepresented groups and ensure that every individual feels included, valued and respected.

## COLLABORATION

Facilitate the sharing of skills and ideas, and bring together the community's strengths.

## LISTENING

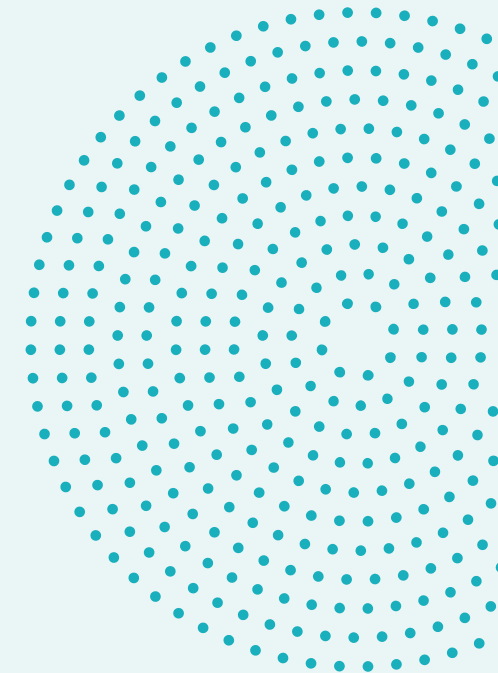
Be attentive to the needs and solutions identified by the community, and nurture relationships based on trust.

## CREATION AND INNOVATION

Experiment with, and adopt, innovative approaches so as to increase our agility as well as our impact in the community.

## INTEGRITY

Demonstrate honesty, transparency, high ethical standards, humility, accountability and professionalism.



# Our impact

**Advancing the Sustainable  
Development Goals in  
Greater Montreal**

**Disseminating knowledge  
and amplifying philanthropic  
and community voices**



© iStock photo

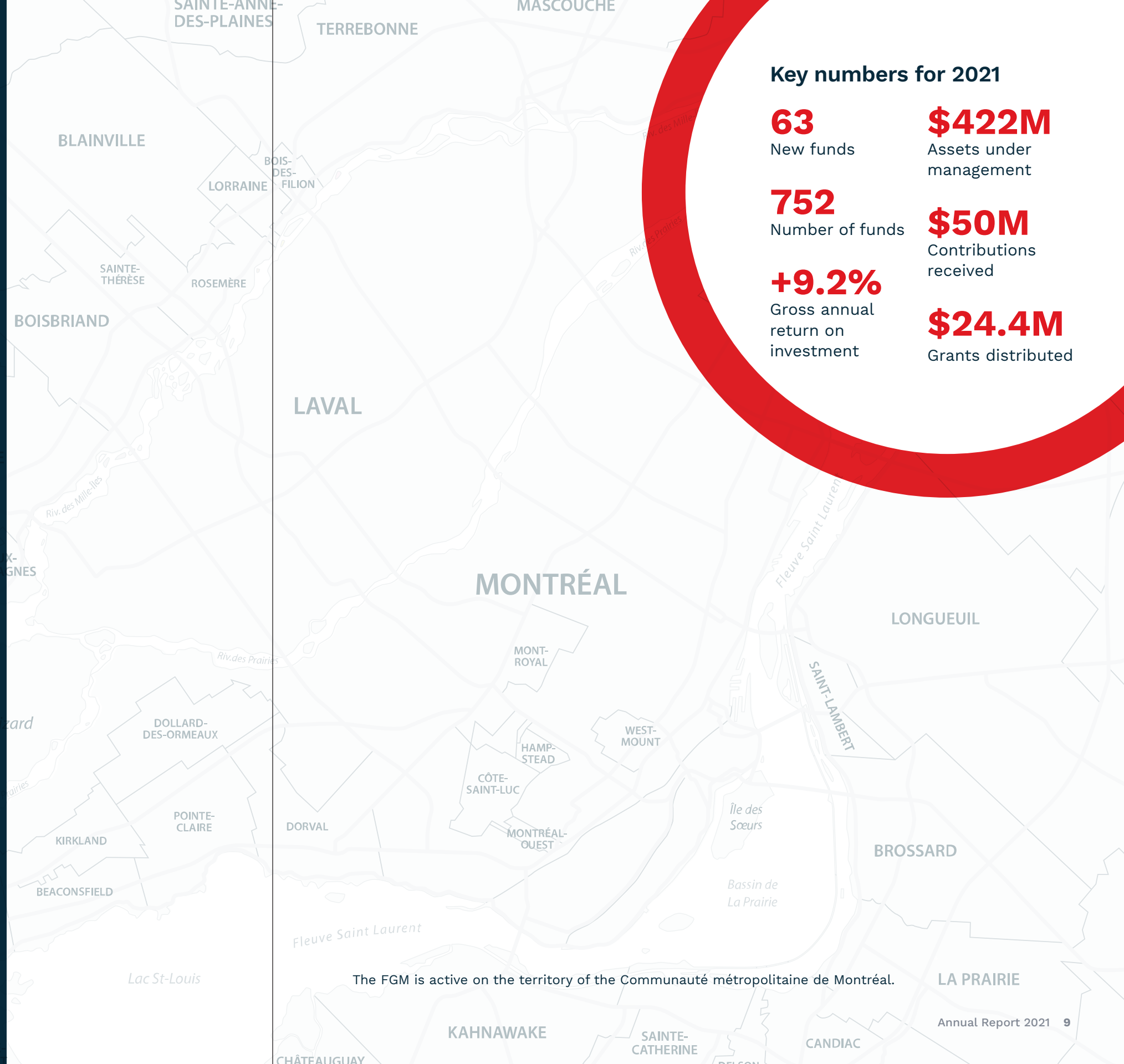
In 2021, the amount of grants distributed by FGM since its creation **went over \$100M**. But we did not rest on our laurels: FGM undertook **numerous projects and new collaborations** this year. As you will find out in the pages that follow, several partnerships were launched with several different entities, Collective Funds were started, and we paid special attention to listening to the community and to matters of diversity and inclusion – most notably in the development of the 2022-2026 Strategic Plan – and to the principles of trust-based philanthropy.

2021 was also the year in which we launched our **responsible investment strategy**, which integrates environmental, social and governance (ESG) criteria, as well as equity, diversity and inclusion (EDI) standards, including reconciliation with, and respect for the rights of, Canada’s First Peoples. From now on, the totality of our assets will be at the service of our mission to enhance the well-being of the community, and, between now and 2030, FGM will reduce the carbon emissions from its asset portfolio by 45%. And those are just a few examples of what we achieved this year!

Please read on to discover the impact that fund creators, organizations, and FGM partners have had. In other words, the impact generated by *your* foundation.

### Key numbers for 2021

<b>63</b> New funds	<b>\$422M</b> Assets under management
<b>752</b> Number of funds	<b>\$50M</b> Contributions received
<b>+9.2%</b> Gross annual return on investment	<b>\$24.4M</b> Grants distributed



The FGM is active on the territory of the Communauté métropolitaine de Montréal.

# Advancing the Sustainable Development Goals in Greater Montreal

In 2017, the Foundation of Greater Montréal adopted the United Nations' Sustainable Development Goals (SDGs) as a framework for action. These 17 global goals guide FGM's interventions, and enable it to measure the social, economic and environmental progress of the Montreal community, while also making it part of a worldwide movement. Over the last year, aiming to enhance its impact and to act effectively with respect to the complex and dynamic connections that exist among the SDGs, FGM decided to base its actions on **six major themes for intervention: social equity, diversity and inclusion, ecological transition, culture, health and education**. The content of this report is organized according to these six themes.



## Social Equity

Sustainable Development Goals 1, 2, 8, 10 and 16

### COVID-19 Collective Fund

In 2020, seeing the impact of the COVID-19 pandemic on the community sector and on the population, FGM's leadership rapidly adjusted its distribution plan, re-orienting granting programs and creating the COVID-19 Collective Fund. With the support of several benefactors, private foundations and businesses, the implementation of this fund made possible the distribution of \$1,563,930, going towards 119 projects (88 deemed priority and 31 categorized as strategic), in order to help organizations throughout the territory respond to the community's immediate, priority needs, develop foundational projects or adapt their services to the pandemic situation, all so as to better serve their users.

In 2021, we created an **Impact Catalogue** with a view to showing donors the reach and impact of the COVID-19 Collective Fund. The catalogue presents the Fund's approach and its results, and highlights 20 of the 119 funded projects. These initiatives, categorized by SDG, reflect a variety of types of action, and of populations and neighbourhoods served. A brief press review, and a presentation of FGM initiatives to come, rounded out the publication.

The Impact Catalogue was unveiled May 18, on the occasion of an **FGM Rendez-vous**, an invitation-only event for those who donated to the fund, where they were able to exchange with representatives of two funded organizations.

Worth noting is the fact that, in recognition of its involvement in the fight against the pandemic and its coming to the aid of the population, notably through the COVID-19 Collective Fund, FGM was in June of 2021 awarded a **Saint John Ambulance Canada COVID-19 Recognition Medallion**.





## Collective Fund for Social Equity

With the COVID-19 Collective Fund, FGM brought **special attention to bear on populations that were most impacted or most vulnerable** (women, the elderly, members of LGBTQ2S+ communities, persons living with functional limitations, Indigenous or racialized individuals, and others). The Foundation also simplified calls for project proposals as well as accountability requirements for organizations. In the midst of these adjustments, it also **undertook a process of reflection on its own ways of doing things**.

In 2021, this reflection process on FGM practices, and the desire to continue to support these organizations, resulted in the launch of the Collective Fund for Social Equity. Through a **renewed engagement with the concepts of justice, equity, diversity and inclusion (JEDI)**, FGM continues to give priority to organizations and projects led by, or designed for, individuals who are Black, Indigenous or persons of colour (BIPOC). Intersectional approaches aimed at assisting the other vulnerable populations mentioned above are also to be given priority. As for the issues being addressed, FGM's actions will be focused, like they were with the COVID-19 Collective Fund, **on food security, homelessness and mental health**, where the needs are many and pressing. These orientations flow from discussions with intervenors on the ground as well as from knowledge and experience acquired since the start of the pandemic.

**The choice of organizations and projects supported through the Fund is also guided by the principles of trust-based philanthropy.** Unlike a formal call for projects, trust-based philanthropy involves drawing on the knowledge acquired by the whole of the community's ecosystem, so as to compensate for power imbalances inherent in the traditional philanthropic model. FGM therefore relies on exchanges with the milieu, and active and continuous listening, as the basis for selecting the organizations it will assist. **It thus builds trust-based relationships founded on listening, openness and transparency with each target organization.** To that end, FGM conducted 74 conversations with as many organizations between the spring and the fall of 2021, then chose **39 target organizations to each receive \$30,000**. The details of this first round of grants, totalling nearly \$1.2M, will be made public in 2022.

**The Foundation of Greater Montréal wishes to thank its partners for the support and trust they have shown with regards to the Collective Fund for Social Equity:** the Fondation J. Armand Bombardier, the Morris and Rosalind Goodman Family Foundation, the Echo Foundation, the McConnell Foundation, The Trotter Family Foundation and the Fonds Fondation RG at FGM, as well as the individuals having made donations online.



Action jeunesse de l'Ouest-de-l'Île (AJOI) aims to establish and maintain street outreach work services for youth aged 12 to 25 who are at risk or in difficulty. It is among the organizations that will be funded by the Collective Fund for Social Equity in 2022. © AJOI

## Collective Impact Project (CIP)

From 2016 to 2021, the Foundation of Greater Montréal, eight other major foundations and three strategic partners supported Phase 1 of the Collective Impact Project (CIP). This Centraide of Greater Montreal initiative assists local actors and projects that improve the well-being of residents in 17 Montreal neighbourhoods, working in a more intensive fashion in five of them. The foundations' collective commitment to contribute \$23 million over five years to back this strategic initiative yielded sustained action against poverty and exclusion, and led to the development of more resilient and more organized communities, able for instance to better respond when COVID-19 hit.

This year, all the strategic and funding partners confirmed their commitment to back Phase 2 of the CIP. For FGM, this translates into a **commitment of \$200,000 per year for five more years**. This second phase will cover a larger territory; help will be available to all Montreal neighbourhoods. It will as well aim to integrate equity, diversity and inclusion into the collective impact, by focusing on action, representativeness, and the transformation of existing systems.



**For FGM, this translates into a commitment of \$200,000 per year for five more years.**



© pic.centraide.org





## La maison Tremplin de Longueuil

Since 1988, the community organization known as La maison Tremplin de Longueuil ("tremplin" is "springboard" in French) has worked actively to enhance the quality of life of families in the Vieux-Longueuil borough. Acting as a social safety net for many individuals, this space welcomes children, parents, and persons who are immigrants, or elderly, or alone, who come here to exchange with others or make their way along their own personal journeys. It offers, in particular, workshops with activities for children from newborns to five years of age, respite, support for parents, a program for kids aged six to 12, a food service with prepared meals, a communal "dining hall" and a second-hand clothing store.

When COVID-19 forced the closure of its physical premises, the Tremplin team made sure its most vulnerable users did not remain isolated; they scheduled multiple phone calls and videoconferences, and delivered prepared meals. The maison Tremplin reopened as soon as was feasible, restarted whatever activities could be pursued and adjusted its services.

In 2021, Animations Tournesol (summer activities for children) was supported by the **Fonds Fondation Mariette et Gilles Vendette** at FGM. Neighbourhood children of many origins come to play, learn, socialize and grow in a loving and safe space, watched over and animated by staff. It is also a wonderful way to prepare the older ones for kindergarten! As the children take a breather, parents get their own rest time, or take the opportunity to go to appointments or French-language courses, or get a handle on day-to-day tasks that have been made more complicated by the pandemic, all while getting support and information offered by the organization. In this pandemic-dominated period that exacerbated isolation and many other problems, these moments of respite were welcomed by both children and parents.



Animation Tournesol (Sunflower activities) at the maison Tremplin de Longueuil.  
© maison Tremplin de Longueuil

## Le Fonds Fondation Louis Pierre

For Louis Pierre, gratitude, empathy and solidarity are the foundations of philanthropy. Conscious of the fact that not everyone gets the same opportunities in life, he started thinking about how he could best help others. His first contributions came while he was a student, pitching in with other volunteer swimming instructors to organize swim classes for individuals with disabilities, and continued as he began his career with the federal government. "I started with fairly modest donations, but then realized that as the years went on, I had the capacity to give more. It didn't hurt too much.... In fact, it made me feel pretty good to see that I could help those who were less fortunate."

Over time, Mr. Pierre focused more particularly on causes close to his heart. His wish was to support "people who are in especially difficult situations, often beyond their control, by providing them with immediate comfort and assistance, and the hope and the means to imagine a better future."

He therefore, in 2016, created the Fonds Fondation Louis Pierre at the Foundation of Greater Montréal, with the following aims:

- support organizations that provide temporary shelter for individuals experiencing homelessness, food insecurity, addiction, or social exclusion, while also providing them the assistance they need to get themselves out of those situations (Welcome Hall Mission, Gîte Ami);
- ensure food security for those living in difficult socioeconomic conditions, in partnership with organizations in the Outaouais region (Moisson Outaouais);
- assist with the provision of medical and humanitarian aid to populations victimized by armed conflict, natural disasters, epidemics, famine, or other emergencies (Doctors Without Borders);
- help girls in developing nations pursue postsecondary studies.

Mr. Pierre's priorities show a deep concern for social equity and inclusion, and line up with several Sustainable Development Goals.

When he created his fund, Mr. Pierre figured he would make it grow mainly through a provision in his will, but he has since changed his approach. He has chosen to "contribute regularly, so as to be able to give out more assistance right now, which gives me great satisfaction when I see tangible results."



M. Louis Pierre



## Philanthropic Foundations and Commitments to Fight Inequality



On November 15 (National Philanthropy Day), the Collective of Quebec Foundations Standing Against Inequality rolled out the document entitled *Philanthropic Foundations and Commitments to Fight Inequality*. As inequalities in income and wealth distribution continue to increase in Quebec, thus reducing the likelihood of equal opportunity for all, **15 Quebec foundations, including FGM, have made the commitment to monitor the coherence and impact of their actions with a view to diminishing their inequality footprint.**

With this statement, the Collective is putting forward a new framework for reflection, one that gives foundations new benchmarks to follow in setting their commitments, and also offers a space for networking, learning and sharing of thoughts regarding social inequalities and the role foundations can play in reducing them in the current social context.



## Our approach to justice, equity, diversity and inclusion

With a view to bolstering its efforts to promote equality and fight all forms of discrimination, and in order to better reflect the community it serves, the Foundation of Greater Montréal in 2020 undertook a process of deep reflection on justice, equity, diversity and inclusion (JEDI). FGM staff, its Board of Directors and its volunteers embarked on a **process that combines learning and action, over several years, aiming to integrate all of these issues in a cross-sectoral way in the Foundation's areas of activity and organizational structure.** In 2021, this notably led FGM to place JEDI values at the heart of its mission, as highlighted in its 2022-2026 Strategic Plan and its Responsible Investment Policy, to begin developing an inclusive style guide, and to produce a statement on justice, equity, diversity and inclusion that will hereinafter be the bedrock of its commitments.

### Statement on justice, equity, diversity and inclusion

The values of justice, equity, diversity and inclusion are at the heart of the Foundation of Greater Montréal's mission. FGM aspires to be a reflection of the community it serves.

In order to break down barriers, and work towards an inclusive society, FGM will listen, learn, and implement purposeful measures in its own organizational culture, its granting activity, its investments, its decisions and its actions.

It acknowledges the existence of factors of discrimination towards individuals and groups, manifested both directly and systemically in our society, as well as the intersectionality of different types of discrimination that can be experienced simultaneously, and should not be dissociated nor seen as having a hierarchy.

At the same time, FGM commits itself to:

- continuously making structural changes in its practices, including in its investments and its granting;
- pursuing a program of continuing education on issues of justice, equity, diversity and inclusion;
- contributing to raising awareness among stakeholders and offering spaces for dialogue, exchange and understanding;
- ensuring that the composition of its staff, its volunteer pool and the resources it draws upon reflect the community it serves;
- measuring and evaluating its progress in these areas.



## Reflection and collective learning on philanthropy and equity, diversity and inclusion

After a period of lengthy reflection, FGM in the spring of 2020 undertook a process of data collection as regards diversity within the emergency funding it deployed in response to the COVID-19 crisis. Seeking to pursue its **reflection on issues that link philanthropy and the practices of equity, diversity and inclusion (EDI)**, notably with respect to investing in aid of groups representing diversity, FGM approached several other foundations that had embarked on a similar procedure. A **group of five major Montreal foundations** was thus formed. Following a series of exchanges, the group created a tool that allowed each participating foundation to collect data on its EDI actions, and to compare and share experiences with the others, throughout 2021. Philanthropic Foundations Canada also joined in the process, as an observer.

In order to document this collaboration among foundations and the process of developing the EDI measurement tool, **a research partnership was entered into with PhiLab** (Canadian Philanthropy Partnership Research Network) in the spring of 2021.

In developing a common data collection method, the members of the group also wanted to place themselves in a **posture of learning and exchange of information**, eventually raising awareness among other actors in the philanthropic sector about the importance of a granting approach that is sensitive to the concepts of equity, diversity and inclusion.

A research partnership was entered into with PhiLab in the spring of 2021.



## Women's Impact Montreal Collective Fund

Even though their needs are huge, community organizations that work directly with women and girls receive only a minuscule part of available funding – only 1.6 % of all philanthropic giving, based on recent estimates. **Pursuing an initiative brought forward by Kathy Fazel, Chair of the Board of Directors, and bolstered by the commitment of several women, the Women's Impact Montreal Collective Fund (WIM) was created at the Foundation of Greater Montréal this year.** Administered by an advisory committee made up of Fund members, **this giving circle** has a mission to support organizations dedicated to the development and well-being of the most vulnerable women and girls in our community. **This collaborative philanthropic vehicle aims to establish an equitable, accessible and durable mode of funding for the projects and organizations** that will be selected. Funds raised will be used for annual granting, but also to constitute a capital that will ensure the long-term progress of the Fund.



The WIM Fund was officially launched September 23, 2021 at an FGM Rendez-vous. The Foundation of Greater Montréal organized a **panel focusing on the current situation of women and girls in the metropolitan area** for the occasion. Held in partnership with the Centre for Sustainable Development, this virtual event drew more than 150 people, who tuned in to hear Maud Briancourt of the Centre des femmes de Montréal, Déborah Cherenfant of the Junior Chamber of Commerce of Montreal and Sabrina Lemeltier of the women's shelter La Dauphinelle speak on the key issues affecting women today.

As of December 31, 2021, the WIM Fund had already recruited 74 members, committed to supporting the Fund for at least three years, and had benefited from the generosity of numerous donors. **FGM has also committed to matching the first 100 member donations.**

The first grants, as voted on by Fund members, will be allocated in 2022. They will go to organizations addressing violence, employment (integrating a job, and working conditions) and mental health.

### ADVISORY COMMITTEE MEMBERS:

Deborah Shannon Trudeau - Chair, Christiane Bergevin, Mary-Anne Carignan, Dominique Décarie, Mina Farinacci, Kathy Fazel, Fiona Macfarlane, Monette Malewski, Sandra Rabrun, Alana Singer, Sylvie Trottier.



## Fund to support Indigenous initiatives

In order to meet the challenges faced by Indigenous populations living in Greater Montreal, FGM has undertaken to distribute \$200,000 to 10 organizations via its fund for the support of Indigenous initiatives. Utilizing a trust-based philanthropy approach, the Foundation targeted organizations to be supported based on its exchanges with those who are on the ground, as well as through active and continuous listening. In addition to this knowledge sharing with individuals referred by the community, it paid particular attention to the variety of needs involved and to the context in which service was being provided (urban environments and reserves). As a result of the groundwork done in this phase, \$20,000 will be distributed, or are in the process of being distributed, to each of the 10 Indigenous organizations identified, in support of their missions.

Among these are the KSDPP. The Kahnawake Schools Diabetes Prevention Program (KSDPP) is committed to preventing type 2 diabetes in Kahnawake. Its team “empowers community members to care for their personal and family health through continual improvement of a unique diabetes prevention model based on Kanien’keha values”. It promotes healthy eating, physical activity and holistic wellness by designing and implementing school, family and community intervention activities. KSDPP also deploys a participatory research program where the community and researchers are in partnership, each contributing their own expertise.



Kahnawake Winter Carnival. © KSDPP

## Resilience Montreal

In January, FGM made a commitment to support Resilience Montreal, for three years at \$50,000 per year. The organization has set itself up in Cabot Square, which has become a gathering place for Indigenous persons experiencing homelessness. In recent years, an emergency shelter that had been operating there was moved, triggering a crisis situation, resulting among other events in several police interventions. A resource to help the most vulnerable, the Resilience Montreal shelter, with a low-barrier acceptance threshold, offers services to all, no matter their situation. It provides food and lodging, psychosocial and medical services, as well as access to a multitude of other resources. Its users, primarily Indigenous, are often dealing with multiple traumas, as well as discrimination that can prove life-threatening. At Resilience Montreal, these individuals can find a meal, a shower, donated clothes and a cleaning service, but most of all, support and an open door, whatever their condition.

The Foundation’s backing for Resilience Montreal was concomitant with that of other foundations. Through a new form of collaborative intervention, seven foundations (Centraide of Greater Montreal, George Hogg Family Foundation, Foundation of Greater Montréal, Fondation J.A. DeSève, Fondation Marcelle et Jean Coutu, the McConnell Foundation and the Pathy Family Foundation) committed to supporting Resilience Montreal’s operations through a donation of \$1.5 million over 3 years. While the provincial and federal governments, and the City of Montreal, announced funding for the purchase and renovation of a building that will serve as a day centre for homeless individuals, this support from the philanthropic sector will help ensure the project’s long-term survival.

This type of partnership among foundations is representative of a wider informal process of collaboration, which aims to encourage interchange on Indigenous issues, to amplify impact in the community and reduce organizations’ administrative and financial burdens. These groups normally have to respond to as many calls for proposals and produce as many accountability reports as there are potential funders. In proposing a “single window” approach, even informally, foundations can make their job easier. In the course of the year, three other foundations joined in this effort: the Echo Foundation, the Trottier Family Foundation and the Peacock Family Foundation.

We would also like to recognize the contributions of the FlatCat Fund and LES Foundation Fund at the Foundation of Greater Montréal to Resilience Montreal and more broadly, to the Native Women’s Shelter of Montreal.



Press conference held February 22, 2021, announcing financial support for Indigenous individuals experiencing homelessness in the city. © Simon Clark



Tasha Lackman, Vice President, Philanthropy and Community, FGM, Nakuset, Executive Director of the Native Women’s Shelter and co-manager of Resilience Montreal, and David Chapman, Executive Director of Resilience Montreal, at a march held on September 30, 2021, highlighting the first-ever National Truth and Reconciliation Day.



## Société Logique

The non-profit organization Société Logique is a pioneer in the field of universal design in Quebec. Its mission is to promote, and realize, the design and creation of universally accessible environments. Société Logique's story began in 1981, when a group of former users and intervenors from the Lucie-Bruneau Rehabilitation Centre in Montreal decided to create a housing project aimed at integrating people with functional limitations. From that project was born the Société d'habitations communautaires Logique ("Logique" being in this case a blend of "logis", or dwelling, in French, and "Québec"). Société Logique combines an understanding of the needs stemming from functional limitations (be they the result of age or other situations of incapacity) with solid architectural know-how. The organization provides consulting services and advice on urban planning, as well as promoting and furthering universal accessibility throughout Quebec. By contributing in this fashion to the deployment of spaces that are more functional for everyone, Société Logique helps build a more inclusive and egalitarian society, both in the short term and over the long term.

For the fourth year in a row, the **Fonds Foundation Paul-A. Fournier** has supported Société Logique in its mission. Thanks to this contribution, Société Logique has been able to continue responding to the many requests for information it receives from individuals and organizations. It has also been able to offer educational activities for students, municipalities, organizations and citizens' groups. The organization carries out a multitude of actions that, cumulatively, will result in well-planned spaces in which everyone, regardless of age or capacity, can find their way, move about, and be enriched by similar experiences.



Portrait of an organization

**Société Logique**  
design universel | universal design



An exploration walk organized by Société Logique. © Société Logique

## Fonds Fondation LISI GEOFFROY

René Lisi came up with the idea of creating a foundation while thinking through his estate management and succession planning. Motivated by generosity and a desire to share with the community, he also wanted to be free of the administrative and legal constraints that come with managing a foundation. He wanted to be able to focus on its development and on granting activity, working alongside two advisors. That is why he turned to the Foundation of Greater Montréal, which accompanied him as he worked on clearly identifying the needs, mission and goals of his fund. "The process can be moved along quickly if one wants, but it really does merit deep reflection and solid planning. The FGM team's openness, ability to listen and assistance were invaluable."

The Fonds Foundation LISI GEOFFROY was thus created as an in-perpetuity fund in December of 2020. "My estate will continue to have an impact after I am gone, and I will be able to contribute to and support causes that have been dear to me during my lifetime, thanks to the transparent and reliable mechanism FGM has provided me. As well, I have agreed to allocate 10% of the annual payout from the fund to support the Foundation of Greater Montréal Community Fund. FGM's platform provides me with an ideal setting in which to put my philanthropic values into action, and thus the opportunity to 'pay it forward!'"

Inspired by his close friendship with the late France Geoffroy, a quadraplegic artist working in contemporary dance, and well connected to the milieu she worked in, Mr. Lisi stepped up his level of engagement following her death in April of 2021. In tandem with his involvement as a member of the board of directors of the inclusive dance company Corpuscule Danse (a company France Geoffroy co-founded), he is aiming to foster and enhance inclusion for individuals with disabilities. "The Fonds Foundation LISI GEOFFROY wants to create conditions that will further an individual's development notwithstanding the constraints and obstacles they face." The fund's mission will therefore focus on three axes: advancing research; fostering education and inclusion in the workplace; and promoting visual and performing arts produced by diverse individuals or individuals with disabilities. As Mr. Lisi points out, "We still have a lot of work and consciousness raising to do until persons with disabilities can fully take their rightful place," and through his fund, he is determined to contribute to this vital societal initiative!



Portrait of a fund creator



Corpuscule Danse. © Mikaël Theimer



## Collective Fund for Climate and Ecological Transition

In April, the Foundation of Greater Montréal announced the creation of a **new philanthropic fund dedicated to the fight against climate change, the strengthening of environmental resilience and the acceleration of ecological transition in Greater Montreal**. The FGM's Collective Fund for Climate and Ecological Transition is banking on the dynamism of the community and the growing interest of the philanthropic sector regarding climate issues to become a catalyst for community and citizen action. It will make new funding available for foundational and innovative projects, and augment the capacities and the mobilization of organizations and citizens groups engaged in the transition.

**Already this year, grants totalling \$568,000 were distributed to projects and organizations** meeting these criteria. Through this initiative and many others, Greater Montreal will be able to take concrete action to progress in the fight against climate change, and in efforts to adapt to it.

**The development of a research centre, the Campus de la transition écologique, is one of the projects being funded, with a grant of \$80,000.** The Campus is a new independent organization dedicated to research, experimentation, and education relating to ecological transition issues. Located in Parc Jean-Drapeau, it aims to be a showcase and a hub of innovation where tangible solutions for ecological transition and resilience will be found and put into practice. Thanks to the support of the Collective Fund for Climate and Ecological Transition, the Campus, in partnership with the Chaire de recherche sur la transition écologique at UQAM, will be able to develop its specific scientific vision and the broad outlines of organization and collaboration that will guide the work of the research hub. This initial process will lead to the deployment, at first on a small scale and then on a broader scale, of new knowledge on the ecological transition.

**The Foundation of Greater Montréal wishes to thank its donors for the support and trust they have shown with respect to the Collective Fund for Climate and the Ecological Transition:** the Fonds Fondation Gatién Paquette, the Fonds Fondation Paul-A. Fournier, and the Fonds Fondation RG at FGM, as well as individuals who made donations online.



© The site of the Campus de la transition écologique.

## Canada Healthy Communities Initiative (CHCI)

In 2021, the Foundation of Greater Montréal collaborated with Community Foundations of Canada, the Canadian Urban Institute and the government of Canada to support organizations and municipalities that are developing projects to make public spaces more accessible. **COVID-19 showed us the importance of having public spaces that are accessible, inclusive and safe – be they physical or virtual.** The Canada Healthy Communities Initiative (CHCI) is a \$31-million investment on the part of the government of Canada that aims to help communities create or adapt such spaces. It is built on three themes: create safe and vibrant public spaces, improve mobility options, and provide innovative digital solutions. The projects chosen for funding must involve the community and pay special attention to needs of those who are vulnerable, as they were the hardest hit by the pandemic.

FGM was tasked with promoting the initiative within communities, especially where vulnerable populations were involved, then creating an advisory committee made up of experts in CHCI subjects, evaluating projects and putting forth recommendations. The overall envelope for the metropolitan area (Montreal, Laval and the Montérégie) came to \$2,155,000, and funding for eligible projects ranged from \$5,000 to \$250,000.

Among the **41 projects selected during the two phases of CHCI's deployment** is "Green alleyways in Montreal-North: active and safe!": with funding of \$99,999, the **Éconord** organization, in partnership with the Escale youth centre and neighbourhood Police Station 39, encouraged youth from this borough to take an active role in the security and beautification of green alleyways, through participation in fun and educational activities organized by volunteer instructors. Woodworking and horticulture were among the activities offered.

**In the Montérégie, the Maison des Jeunes des Quatre Fenêtres** will be able to enhance its online youth centre, aiming to respond to teenagers' needs in a pandemic context and thus diminish their isolation and anxiety.

Another example: in **Kahnawake, the Mohawk Council of Kahnawake** was allocated \$60,000 for the revitalization of Sesame Park. An open-air pavilion will be built within the confines of this "sensory" playground, specially conceived for children with special needs, where many community and cultural activities will be held.





## Montreal Climate Partnership

In late 2020, in the wake of the unveiling of the Montreal Climate Plan (the development of which Karel Mayrand participated in as Co-Chair of the City of Montreal's Advisory Committee on Climate), FGM announced the creation of the Montreal Climate Partnership (MCP). Conceived in collaboration with the Trotter Family Foundation and with the City's support, and bringing together institutional, economic, community and philanthropic actors, this **independent initiative has as its mission the mobilization of key actors in the Montreal community in accelerating the reduction of greenhouse gas emissions, enhancing the city's resilience vis-à-vis climate change**, and helping achieve Climate Plan goals.

In 2021, the steering committee began its work. The will to act collectively to decarbonize the city and to enhance its capacity for resilience gave rise to several **meetings resulting in collaboration, mobilization and action**. MCP decided to focus on **six priority areas, with the participation of 80 organizations: building, mobility, businesses, adaptation, citizen-led initiatives and finance**. MCP intends to implement projects with a major potential for impact, and encourage key actors in the city to get involved in this first-of-its-kind coalition.

To this end, MCP launched the **Great Expectations: Fast-forward Montreal's climate transition campaign**. Utilizing an [online engagement platform](#), organizations commit to adopting and implementing at least one foundational measure (on top of actions that are already planned, embarked on or realized) aimed at reducing their carbon footprint, reinforcing the city's resilience in the face of climate change, and showing the way for the business sector. All organizations in the metropolitan region are being encouraged to join the movement and incorporate foundational measures into their operations between now and the Sommet CLIMAT \ MTL event, to be held in May of 2022. FGM's commitments can be viewed on our [website](#).

### The members of the Montreal Climate Partnerships Steering Committee are:

Aéroports de Montréal, Association des sociétés de développement commercial de Montréal, Broccolini, Caisse de dépôt et placement du Québec, Copticom, CRE-Montréal, Desjardins, Énergir, EY, Fondation, David Suzuki Foundation, Foundation of Greater Montréal, Trotter Family Foundation, Greater Montreal Climate Fund, Solidarity Fund QFL, Gestion immobilière Quo Vadis, Hydro-Québec, Jalon, Junior Chamber of commerce of Montreal, Montreal Metropolitan Chamber of Commerce, Port of Montreal, Propulsion Québec, Concordia University, Université du Québec à Montréal, the City of Montreal, Vivre en Ville.



## Partnership with the Centre for Sustainable Development

In August, the Foundation of Greater Montréal and the **Centre for Sustainable Development (CSD)** announced a partnership that will see FGM contribute to CSD's programming via the holding of jointly organized public events. This two-year agreement will allow the two organizations to further pursue their mandates for the dissemination of knowledge relating to sustainable development, and for supporting research into solutions to the numerous challenges faced by the Montreal community.

FGM and CSD will in particular cooperate on *Vital Signs of Greater Montreal*. They will thus assist in the dissemination of studies on a variety of issues touching on sustainable development, and will together organize a series of themed events to bring the community up to date on where we stand with respect to indicators related to the SDGs.



Karel Mayrand, President and CEO of FGM, with Josée Duplessis, Executive Director of the Centre for Sustainable Development.

## Environment Funders Canada

In February, FGM became a member of Environment Funders Canada, a national network of foundations and other philanthropic organizations supporting the transition towards a more sustainable world. Its members collaborate with non-governmental organizations, community groups and other charitable organizations to develop and offer programs that can make our communities healthier and more resilient, all while protecting vital ecosystem services as well as the natural world.

The network places much emphasis on learning that is shared through exchanges of information, skills acquisition, the development of better practices and a variety of networking possibilities. All of which is meant to assist members in augmenting their impact and effectiveness, as well as stimulating new philanthropic approaches.





## Canadian Parks and Wilderness Society, Quebec section

The Canadian Parks and Wilderness Society, Quebec section (SNAP Québec, SNAP being Société pour la nature et les parcs du Canada in French) is an organization dedicated to protecting nature. Since 2001, the Quebec section has worked towards the establishment of a network of protected areas across the province, with the goal of ensuring the long-term protection of boreal forest, the Far North, the Saint Lawrence River and the ecosystems that harbour our endangered species. Its efforts have led to the setting aside of thousands of square kilometres of protected area in Quebec, such as the Tursujuq National Park. It also works to ensure the proper management of existing protected areas, and the effective deployment of natural solutions to climate change issues.

This year, FGM supported two SNAP Québec projects. **"A green lung for the Eastern end of Montreal" was funded in the amount of \$20,000 by the Collective Fund for Climate and Ecological Transition.** This major project for the renaturalization of Île Sainte-Thérèse, a 540-hectare stretch of land in Varennes, has as its goal the creation of a nature park for recreation and tourism. In the fall, SNAP Québec coordinated the planting of more than 5,000 trees of about 20 different species, with the help of several partners and nearly 300 citizen volunteers. The second phase of planting, this time with 10,000 trees, is set for the spring of 2022.

This year, **the Foundation also supported Connexion N**, a project headed by SNAP Québec in partnership with SÉPAQ (Société des établissements de plein air du Québec), Fondation Monique-Fitz-Back, the Association des camps du Québec and MEC to offer a first-ever experience of the great outdoors to youngsters who had had no contact with nature. Each year, young people from all backgrounds spend three days immersed in, and discovering, nature. It's a great way to help them sample the joys of the outdoors and experience an adventure that will make them appreciate natural environments, which will ultimately contribute to their protection. While the pandemic forced the cancellation of the 2021 edition, the organization is hard at work on a 2022 event.



Renaturalization of Île Sainte-Thérèse.  
© CPAWS Québec



A first experience in the great outdoors for young Connexion N participants.  
© CPAWS Québec

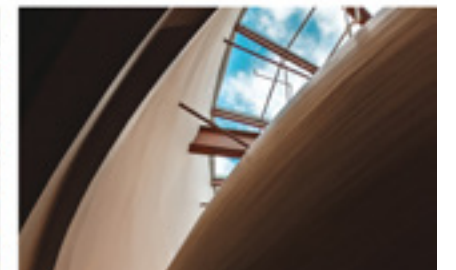
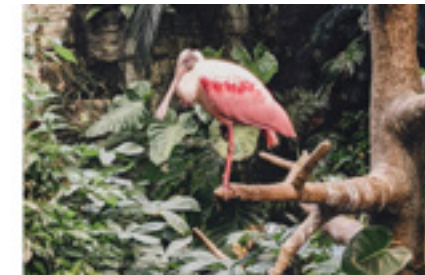
## Fonds Fondation Espace pour la vie

### A BOOST FOR CANADA'S BIGGEST LIFE SCIENCES MUSEUM COMPLEX

Thanks to the extraordinary generosity of donors from the community, the Fonds Fondation Espace pour la vie was constituted at FGM in 2021 with \$1 million to ensure the long-term health of the Biodôme, the Biosphère, the Insectarium, the Botanical Gardens and the Rio Tinto Alcan Planetarium.

"These donors are very keen on keeping their natural sciences museums vibrant," explains Stéphanie Barker, Executive Director of the Space for Life Foundation. Sébastien Fassier, Chair of the Board of Directors of the Foundation, adds: "In these times of health and climate crises, many people are turning to Space for Life to understand science and rethink their relationship to nature. With the Fonds Fondation Espace pour la vie, the community is giving added stimulus to its museums' educational, scientific, artistic and cultural initiatives, so that they can contribute to a socioecological transition that will be just and inclusive."

Worth mentioning among the activities supported by the Fund is the Jérôme-Brisson-Curadeau Bursary. Created as a tribute to the son of two of Space for Life staff members, who died tragically just before turning 10, the Bursary gives children from disadvantaged neighbourhoods free admission to Space for Life day camps, so that they can share in the passion for nature that Jérôme had. "It is a project that the community can take to heart," says Ms. Barker. "Reaching out to the next generation is in our DNA. Children of more modest origins were invited as far back as the 1930s to participate in the Youth Gardens at the Botanical Gardens. Now, and in the future, with the support of the community, children will continue to be able to get close to science and nature – that is in a way the legacy of the Botanical Gardens' founder, Brother Marie-Victorin, but also very much Jérôme's legacy." The Fonds Fondation Espace pour la vie will also support the development of research, conservation, education and dissemination of knowledge at the five Space for Life museums, as well as the upgrading of their amenities, equipment and infrastructures.



© Space for life Foundation





## Philanthropy incentive programs

In order to support the arts and promote cultural philanthropy in Greater Montreal, FGM is notably a partner in programs that incentivize philanthropy in arts and culture. Registered charitable organizations that operate in the targeted sectors can create a fund at FGM and submit requests to these programs for, in particular, matching grants for funds they have themselves collected. The income produced by the investment of these private or governmental contributions, which are added to these cultural groups' endowment funds, helps them develop and maintain the continuity of their activities, which in turn benefits creators, workers in the cultural sector and indeed the entire community.

## Mécénat Placements Culture Program

This program aims to ensure the autonomy and financial security of non-profit organizations operating in the areas of culture and communications. It works towards the creation of permanent funds, and encourages these organizations to fundraise by offering a match on funds collected.

As of December 31, 2021, this program was operating in **430 funds** at FGM, representing a total value of \$157,226,606. **This year, 32 new funds were created.**

In 2021, **the government of Québec distributed \$1,909,007 in matching grants to participating organizations' funds.**

## Canadian Heritage Program

Launched in 2001 by Heritage Canada, the Canada Cultural Investment Fund (endowment incentives component) encourages arts organizations to build new revenue streams. The federal government provides a funding incentive for donations, in the form of matching grants. **FGM has been a participant in this program, which marked its 20-year anniversary this year, since the start.**

Between the creation of this component in 2001 and December 31, 2021, FGM funds of participating organizations received \$14,611,778 in grants from Heritage Canada, for a minimum amount to be held in perpetuity as part of the Foundation's restricted assets of \$29,223,556 for the benefit of the 42 non-profit professional arts organizations that are the recipients of the income produced by these investments.

In 2021, FGM managed **108 funds** in connection with the Canadian Heritage Program, including **19 new ones.** In 2021, **the government of Canada disbursed \$935,350 in matching grants** to FGM funds of participating organizations.

## Mécénat Musica Program

Mécénat Musica is a cultural program created in 2013 by donors, for donors. It encourages individuals to make an in-perpetuity donation of \$25,000 to a cultural organization that is important to them, and it encourages philanthropic families to match these individuals' donations with donations of \$250,000 or \$2,500,000. This initiative has brought a major change to the landscape of cultural philanthropy.

Mécénat Musica donations are all the more impactful since they boost the cultural organization's initial contribution with FGM even before it makes an application for a matching grant to Mécénat Placements Culture or Canadian Heritage.

In 2021, **10 organizations' funds at FGM, including five new ones, were funded by this program.** Over the year, a total of \$2,575,000 (excluding governmental matches) was deposited in the funds of the participating organizations.

As of December 31, 2021, **40 organizations** had been funded at FGM through this program since its inception.

## Ensembl'arts – Marc Djokic and Meng Meng Avery Zhao Fund

By blending concert music with dance and the visual arts, Ensembl'arts creates immersive experiences in unexpected places and spaces. Its innovative approaches are deployed onstage and offstage, and move audiences to experience a new type of multidisciplinary approach in the familiar context of a concert, while also giving equal performance space to each of the disciplines involved. With every new creation, Ensembl'arts seeks to weave stronger connections among music, dance and the visual arts, by bringing new works to life in singular environments. The organization aims to develop innovative projects, educate the public about this special art form, and present performances of the highest quality across Canada.

**"Our organization is led by a team and a board of directors made up of young artists and innovative and engaged leaders. The creation of the Fund, and the contribution from matching programs, gives this new generation of cultural workers the motivation and the support they need to build a promising financial future for the performing arts."**

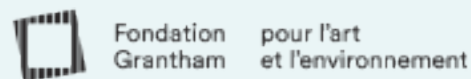
– Avery Zhao, Artistic Director



© Ensembl'arts



## Fonds Fondation Grantham pour l'art et l'environnement



### WHERE THE VISUAL ARTS AND THE ENVIRONMENT MEET

*To hope is to dream of what is possible*, wrote Ernst Bloch. It was with a blend of hospitality, boldness, collaboration and hope that the Grantham Foundation for the Arts and the Environment (GFAE) was created in 2018. Its mission is to foster a meshing of the visual arts and environmental issues. Through its four programs of creation, research, publishing and education, GFAE aims to create a heightened social consciousness that will lead to greater harmony among all living things, and enhance the well-being of the planet.

"The Foundation of Greater Montréal plays an essential role in the life of the Grantham Foundation for the Arts and the Environment, on many levels. It constitutes an essential cog in our plan for the long-term sustainability of our Foundation, in particular by supporting our appeals to private and public granting organizations. As well, its programs produce a multiplier effect on the donations we receive. Finally, its widespread reputation in the philanthropic sector enhances GFAE's credibility."

– Michel Paradis and Bernard Landriault, co-founders



© Fondation Grantham pour l'art et l'environnement

## Le Fonds Michelle-Rossignol du Centre du Théâtre d'Aujourd'hui



### A TRIBUTE THAT WILL TRANSLATE INTO LONG-TERM SUPPORT FOR ARTISTIC ENDEAVOURS PROMOTING EQUITY, SOCIAL JUSTICE OR CULTURAL DIVERSITY.

Dedicated to homegrown theatre, the Centre du Théâtre d'Aujourd'hui (CTD'A) has, since 1968, supported the creation, staging and dissemination of works from Quebec and French-speaking Canada. Michelle Rossignol headed CTD'A from 1989 to 1998, and most notably oversaw the theatre's move to Saint-Denis street, which helped cement its status as an institution. A major figure in Quebec's cultural landscape, Ms. Rossignol also enjoyed an outstanding career in theatre, television and film.

Following her death on May 18, 2020, her partner Jacques Desmarais made an exceptional philanthropic gesture, donating all of Ms. Rossignol's assets to the CTD'A. This historic gift of \$1.4M enabled the creation of the Fonds de dotation Michelle-Rossignol. The in-perpetuity fund will be managed by the Foundation of Greater Montréal, and will be eligible to benefit from matching programs as well as programs that incentivize philanthropy for the arts. The fund's annual income will provide support for artists' residences, writing bursaries for young female authors, workshops on writing for the theatre, new interpretations of major Québécois works, and more.

As Étienne Langlois, co-general manager and administrative director of CTD'A, pointed out in La Presse on May 13, 2021, "thanks to the matching gift mechanism operating through granting entities, we will be able to make sure that the money in this fund will grow and have an impact over the very long term. This is an extraordinary act of generosity that will ensure the sustained development both of the Théâtre d'Aujourd'hui and of creative work in our field".

In November of 2021, the theatre revealed the names of the first 14 recipients of bursaries from the Fonds Michelle-Rossignol du Centre du Théâtre d'Aujourd'hui; they will share awards of varying amounts, with a total of \$100,000 being given out.



Jacques Desmarais, Michelle Rossignol's partner, and Sylvain Bélanger, co-general manager and administrative director of CTD'A. © Maryse Boyce





## Danse Danse

With its home base in Montreal's Quartier des spectacles, Danse Danse has since 1998 provided its audiences the opportunity to discover contemporary dance from here and abroad. It offers a diversified program of new creations and landmark works in the contemporary repertory. With a mission to support and promote contemporary dance, the organization builds bridges between artists and audiences and provides time, space and funding to creators at key points in their careers. In order to make the arts more accessible, Danse Danse develops initiatives and programs specifically targeting a variety of audiences, including "Get Youth into Dance".

Supported since 2020 by the **Chamandy Foundation Fund** (with a three-year commitment), this initiative allows youth from disadvantaged backgrounds to attend Danse Danse performances free of charge. Since the program's inception in 2005, thousands of young people have thus been able to attend contemporary dance shows, in many cases for the first time. Their experience is enriched by personal "chaperoning" and accompaniment.

During the pandemic, Danse Danse stayed connected with this young audience, providing digital programming options and developing new ways of doing things, such as streamed performances available for home viewing and enhanced by educational videos, augmented accompaniment guides that included creative exercises adapted to distance learning, virtual dance workshops available for free on International Dance Day, etc. This panoply of methods reflects the organization's desire to break down barriers that have created unequal access to the world of the arts and to dance in particular.

# DANSE DANSE



© Salomé Boniface

**Danse Danse also has held its own self-designated fund** at the Foundation of Greater Montréal since 2014. The fund enables the organization to provide long term support for its mission, its projects and its artists.

Among the initiatives supported by the Foundation this year, we would also like to highlight the Afromuseum's development projects, undertaken with a backing of \$10,000 through the Fonds Adhoc. The brainchild of Guy Mushagalusa Chigoho – who, since 2014, has been running l'Espace Mushagalusa, a Montreal art gallery and cultural centre dedicated to the promotion of African art collections and culture – the Afromuseum is a nonprofit organization that aims to "discover, recognize and raise awareness of Africa, Africans and Afrodescendants, their culture and their living heritage." This cultural space offers cross-cultural encounters, educational programs, travelling exhibitions, a reference collection, and an online platform to promote the discovery and the expression of Africanness in all its forms.

Another example, this time assisted by the **Fund to support Indigenous initiatives**, is a project to enhance the **employability of Indigenous persons developed by Musique Nomade**, along with Wapikoni mobile. This initiative enabled the organization to shepherd the professional development of two employees from the First Nations. Karen Pinette-Fontaine (who is Innu), focusing on digital content, and Maude Meilleur (Kanien'kehá:ka), a communications and coordination assistant, were able to learn their trades within the organization, and now hold key positions there. Over the next year, they will work together on search engine optimization for digital platforms, and on increasing the reach among the wider public of Musique Nomade and its Nikamowin platform. To that end, they will undergo training that will help them acquire the necessary tools for, and stay up to date on, the best practices in discoverability, communications, and digital media. Maude Meilleur will also have a chance to develop more autonomy in her work, as she will be called on to strategize marketing plans for musical events with a view to becoming a communications officer over the next few years. This development of expertise will benefit all: the organization will be stronger thanks to the skills acquired by the two employees.



Karen Pinette-Fontaine creates art under the name of Kanen. © Alexya Crêteau-Grégoire

## AFROMUSÉE

## MUSIQUE NOMADE



## The Fonds COVID Québec: Supporting neighbourhood responses to COVID-19

Coordinated by the Foundation of Greater Montréal and Philanthropic Foundations Canada, the **Consortium COVID Québec** was created in March of 2020. At that point, it comprised four of Montreal's major philanthropic family foundations: the Jarislowsky Foundation, the Molson Foundation, the Fondation Mirella et Lino Saputo, and the Trottier Family Foundation. In 2021, the Molson, Saputo and Trottier Foundations continued to be part of the initiative, and were supported by other funders. The Consortium makes possible the implementation of local action plans devised collectively by the community, municipal and health sectors, aided by the Canadian Red Cross. The goal is to **support neighbourhoods and public authorities in their responses to the pandemic, limit the spread of COVID-19, and protect the most vulnerable populations.**

In 2021, the Foundation of Greater Montréal remained an active partner, assisting in the development of action plans and coordinating the Fund. Last year's first phase of the initiative covered nine areas, but **this year's second phase extended to 26 sectors (and three million people) thanks to the collaboration of nearly 200 community organizations.** In the fall, the Fonds COVID Québec also helped promote vaccination in several sectors through awareness raising activities and communication.

In parallel, the École nationale d'administration publique (ENAP) is conducting a **study funded by the Fonds COVID Québec on the approach developed by the Consortium.** From initial setup to final evaluation, including implementation on the ground and meetings involving various actors, each stage is being scrutinized. ENAP is documenting and analyzing the process, with a view to making recommendations that will be useful in future on-the-ground responses to crises.

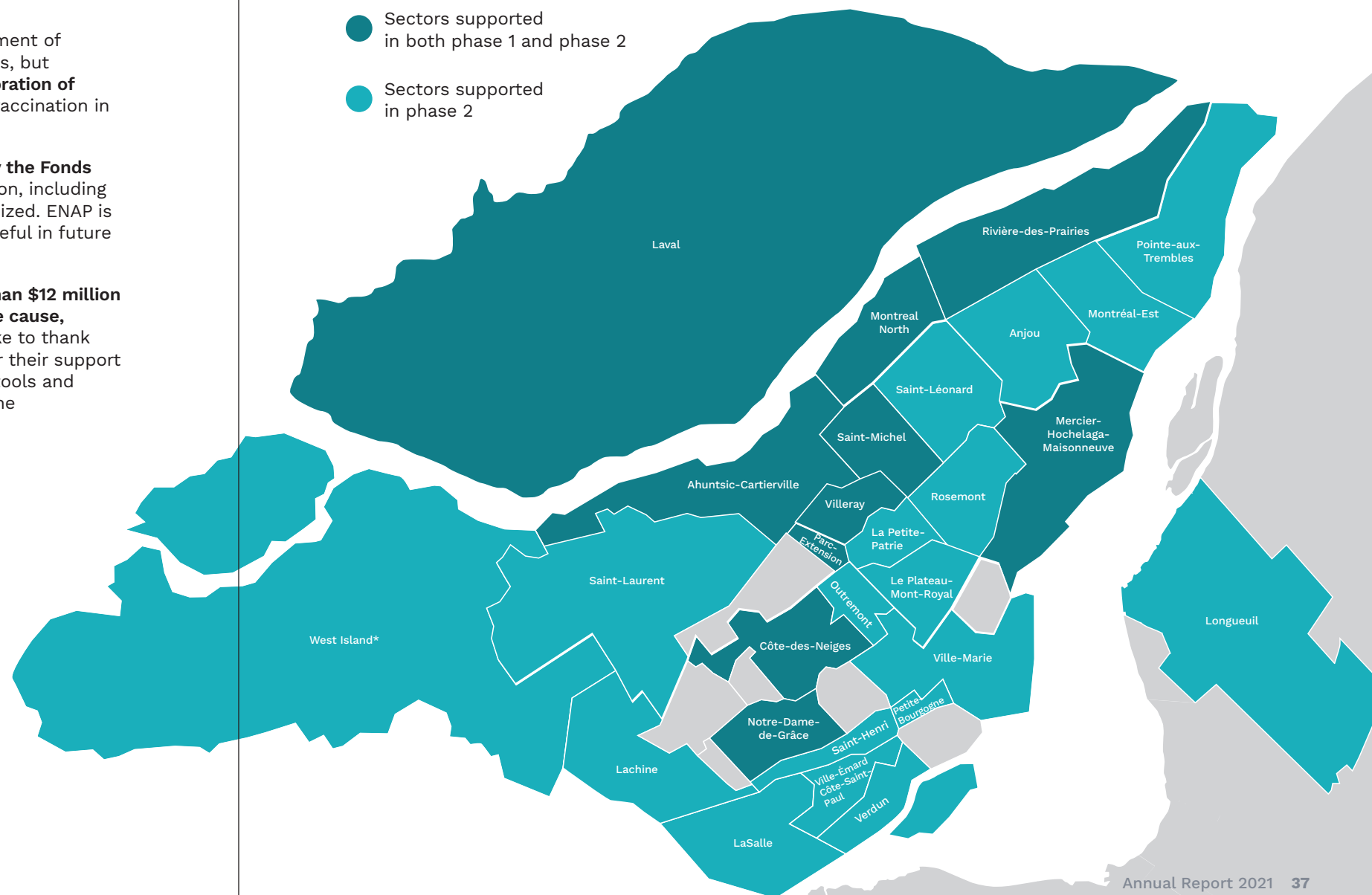
Overall for this project, on which the Canadian Red Cross and CoVivre also collaborated, **more than \$12 million were invested via the Fonds COVID Québec by the partners and by individuals contributing to the cause, including \$7 million over two years by the members of the Consortium.** The Foundation would like to thank its community partners for their action and their commitment, as well as its funding partners for their support and their trust. This project has shown the power of collaboration as well as the value of giving tools and support to local actors in order to get the population on board with health measures and with the vaccination imperative, thus strengthening the fight against the pandemic.

### SECTORS SUPPORTED IN EACH PHASE OF ACTIVITY OF THE FONDS COVID QUÉBEC

**The first phase, from July 2020 to January 2021, covered nine sectors:** Rivière-des-Prairies, Saint-Michel, Mercier—Hochelaga-Maisonneuve, Montréal-Nord, Ahuntsic-Cartierville, Villeray, Parc-Extension, Côte-des-Neiges—Notre-Dame-de-Grâce and Laval.

**The second phase, from February to October 2021, covered 26 sectors:** Saint-Léonard, Pointe-aux-Trembles and Montréal-Est, Rosemont, Anjou, Saint-Laurent, La Petite-Patrie, Ville-Marie, Outremont, La Petite-Bourgogne, Saint-Henri, Ville-Émard—Côte-Saint-Paul, Le Plateau-Mont-Royal, Verdun, LaSalle, Lachine, the West Island\* and Longueuil.

- Sectors supported in both phase 1 and phase 2
- Sectors supported in phase 2



\* The term West Island covers the following sectors: Pierrefonds-Roxboro, Dollard-des-Ormeaux, Dorval, Pointe-Claire, Kirkland, Beaconsfield, Baie-d'Urfé, Ste-Anne-de-Bellevue, Senneville, and L'Île-Bizard—Sainte-Geneviève.



## Teresa-Dellar Palliative Care Residence

The Teresa-Dellar Palliative Care Residence is an independent non-profit organization that provides services free of charge to patients and their families. The Residence relies on community support and fundraising activities to bring in more than \$3.8 million each year and thus top up what it gets in government subsidies. With 23 beds, the residence is Canada's largest independent palliative care establishment and is a recognized leader in its field.



Located in Kirkland, the Residence owes its existence to Teresa Dellar, cofounder with Russell Williams (then the local MNA). Ms. Dellar was motivated by a desire to enable individuals in the final stages of life to live out their last chapter in the most enriching way possible, in peace and dignity, and above all, in their community. When it was founded in 2002, the Residence was the first of its kind on the island of Montreal. Since then, it has grown along with its community and has offered care to more than 5,000 individuals and 20,000 family members.

As well as providing care, the Residence's multidisciplinary team also provides support to loved ones, shares its know-how, and exercises leadership in palliative care in Quebec and Canada, most notably through its Montreal Institute for Palliative Care.

In 2021, the Teresa-Dellar Palliative Care Residence was supported by the **Chamandy Foundation Fund**, the **Malouf Family Fund**, the **Fonds Michael Novak I**, and the **Sam & Lynda Gatelaro Fund**. It now also has its own self-designated fund, the **Fonds Services des soins palliatifs de l'Ouest-de-l'île**.



A patient benefiting from animal therapy. © Teresa-Dellar Palliative Care Residence

## Indigenous Navigators



On the Island of Montreal, Indigenous persons represent 12% of all individuals visibly experiencing homelessness, but only 0.6% of the overall population. Many of these individuals have health issues, but are apprehensive about trying to seek help from the public health system, or even flat out refuse to do so, for fear of being discriminated against, or because they have had bad experiences, or because they don't see themselves reflected in the system.

Since 2018, Doctors of the World's Indigenous Navigators program has aimed to accompany Indigenous people experiencing homelessness in Montreal in accessing public health and social services. The navigators are themselves Indigenous, and, while not healthcare practitioners, they help out by going to meet the individuals where they are, and adapting to their reality and cultural identity. By building relationships based on trust, they identify the obstacles the individuals face in accessing the public health system, thus contributing to ensuring they get appropriate and regular care.

**To support this approach based on health and inclusion, the Foundation of Greater Montréal disbursed a grant of \$20,000 to Doctors of the World this year.** This support was integrated into a concerted effort involving the Pathy Family Foundation and the McConnell Foundation, with the goal of promoting the innovative methods used by Doctors of the World.



© Mikaël Theimer

## Fonds Fondation June Hébert

### A LEGACY FOR CAUSES SHE HELD DEAR

Born in Shawinigan on June 7, 1926, June Hébert had a very full life and career. In 1950, she became one of the first women to earn a degree from the École des hautes études commerciales (HEC) in Montreal. She headed up the HEC Alumni Association, where she launched the Association's job placement service; and subsequently became the Associate Director of the Faculty of Continuing Education. She then obtained a Master's degree in Social Work in 1963, and worked for many years with children with learning difficulties. And finally, in 1983, she became Director of the HEC alumni job placement service.

A socially engaged individual, most notably when it came to women's rights, Ms. Hébert created a bursary for female HEC students to support those who wished to return to their studies after having been absent for more than three years. In 2014, she created the Fonds Fondation June Hébert at the Foundation of Greater Montréal in order to support causes that were close to her heart, in particular health and gender equality. Ms. Hébert passed away June 2, 2021; and her will left the totality of her estate to her fund. As per her wishes, FGM will determine annually the distribution of half of the fund's payout, based on the needs in the community; and the fund's advisory committee will decide on the other half. In this way, the causes she held dear will be supported in perpetuity.



Portrait of a fund creator



Ms. June Hébert

## Notre-Dame-de-Grâce Community Council

Since 1942, the Notre-Dame-de-Grâce community council has been at work in and around the Notre-Dame-de-Grâce sector, where a significant number of vulnerable individuals live. As NDG's neighbourhood roundtable, the council listens as citizens and organizations express their needs, and supports them.

The Walkley Community Centre, the Saint-Raymond Community Centre – NDG Youth Committee, Jeunesse Loyola and the Westhaven-Elmhurst Community Recreation Association are four community organizations that dedicate themselves to the well-being of children and teenagers in the neighbourhood, and offer activities that foster good physical health as well as educational development. A key component of their work is their after-school programs, be they in person, or, when health requirements mandate it, online. In helping with homework, qualified staff guide the youth and ensure that the homework is well understood, and carried out. Staff also maintain a vital link with the families.

This year, their help-with-homework programs, carried out in collaboration with the Notre-Dame-de-Grâce Community Council, were supported by the **Fonds Fondation Paul-A. Fournier and the Fonds Josée et Michel Jacques**. This funding enabled the hiring of several tutors, initiatives to encourage kids to stay in school, and a response to an increasing number of requests for support in French. Between 100 and 130 young people are accompanied each week; they can also take advantage of a space and a connection that foster their academic success as well as a feeling of security and well-being.



Portrait of an organization





## Fonds Josée et Michel Jacques

"We created the Fonds Josée et Michel Jacques at the Foundation of Greater Montréal, since that seemed to us to be a better option than creating a private foundation. The administration is simplified, and the sustainability of the fund is ensured. What's more, FGM helps us identify the organizations that best correspond to our philanthropic objectives.

We think that youth is society's greatest asset; we must protect and nurture it. Our primary goal is to help youth get a taste of success. The realization of one's full potential requires setting ambitious goals and having the necessary self-confidence to take risks and overcome obstacles. We therefore seek out opportunities for helping young people realize a personal project of their choosing. We hope that this will help them acquire more self-confidence and become more ambitious. We are very conscious of the fact that not everyone has the same opportunities in life that we had, but we are convinced that everyone has the potential to develop."

### JOSÉE AND MICHEL JACQUES



Portrait of  
two fund  
creators



© Shutterstock

## CIBPA Bursary Funds

### SUPPORTING A SCHOLARSHIP PROGRAM ACTIVE SINCE 1958

The Canadian Italian Business and Professional Association (CIBPA) was created in 1949. It launched its bursary program in May of 1958, with the goal of supporting youth of Italian descent in Quebec in their studies "to ensure a supported, educated and solid succession, which, in turn, allows them to face and take on new challenges in the emerging business world, while contributing to Quebec society and the Canadian-Italian community." The first bursaries were awarded to students in 1961 and, to this day, more than \$4 million have been distributed, making the CIBPA Foundation one of the largest private bursary foundations in Canada.

In 2018, Mr. Sam Scalia and his wife Diana created the first CIBPA Bursary Fund with the Foundation of Greater Montréal, in order to enhance the bursaries given out by the Association. Subsequently, several other CIBPA Foundation members created funds with FGM in order to contribute to the sustainability over the long term of the bursary program. In 2021, four new funds of this type were created (Bank of Montréal – CIBPA Bursary Fund; CIBPA Foundation Fund; Julia Cianci Bursary – CIBPA Bursary Fund; Sabino Grassi – CIBPA Bursary Fund), thus bringing the number of CIBPA Bursary Funds to a total of 16. Over two years, more than \$25,000 in grants originating from the funds were allocated to the CIBPA Foundation. Thanks to the commitment of fund creators, both present and future, the Foundation will benefit from a very valuable stimulus for its bursary program.



# Disseminating knowledge and amplifying philanthropic and community voices

FGM acts as a reference hub, providing spaces for exchange and dialogue on philanthropic and community issues by publishing studies and organizing events, notably in conjunction with the *Vital Signs of Greater Montreal* series of reports. We disseminate knowledge on key issues with a view to strengthening our community's capacity for action. We amplify diverse and relevant philanthropic and community voices.



© Vivian Doan

## TOWARDS A NEW STRATEGIC PLAN FOR FGM

In 2021, the Foundation undertook a **major consultation and reflection process, with a view to developing its strategic plan for 2022-2026**. For FGM, **listening to the actors in its milieu was critical to this endeavour**, and to do so, we reached out to nearly 700 people and conducted individual interviews; as well, we organized workshops involving dozens of intervenors from the philanthropic and community sectors. **The strategic plan unveiled in 2022 is therefore meant to embody the needs and expectations of our community vis-à-vis FGM.**

The plan presents the Foundation's new mission, vision and values statements, as well as its commitment to promote justice, equity, diversity and inclusion. **It presents the ambitious goals FGM has set for the future, as well as the priorities for intervention that will guide its actions over the next five years.** The Foundation is aiming to increase philanthropic resources and their impact in the community, working from evidence-based data; catalyze new collaborations with its partners (be they existing or new), and disseminate more knowledge on the key issues that face the community.

Initiatives in six areas of intervention will guide FGM's actions as it strives to further the Sustainable Development Goals in Greater Montreal and enhance the well-being of the community and of future generations: culture, health, education, social equity, diversity and inclusion, and ecological transition.





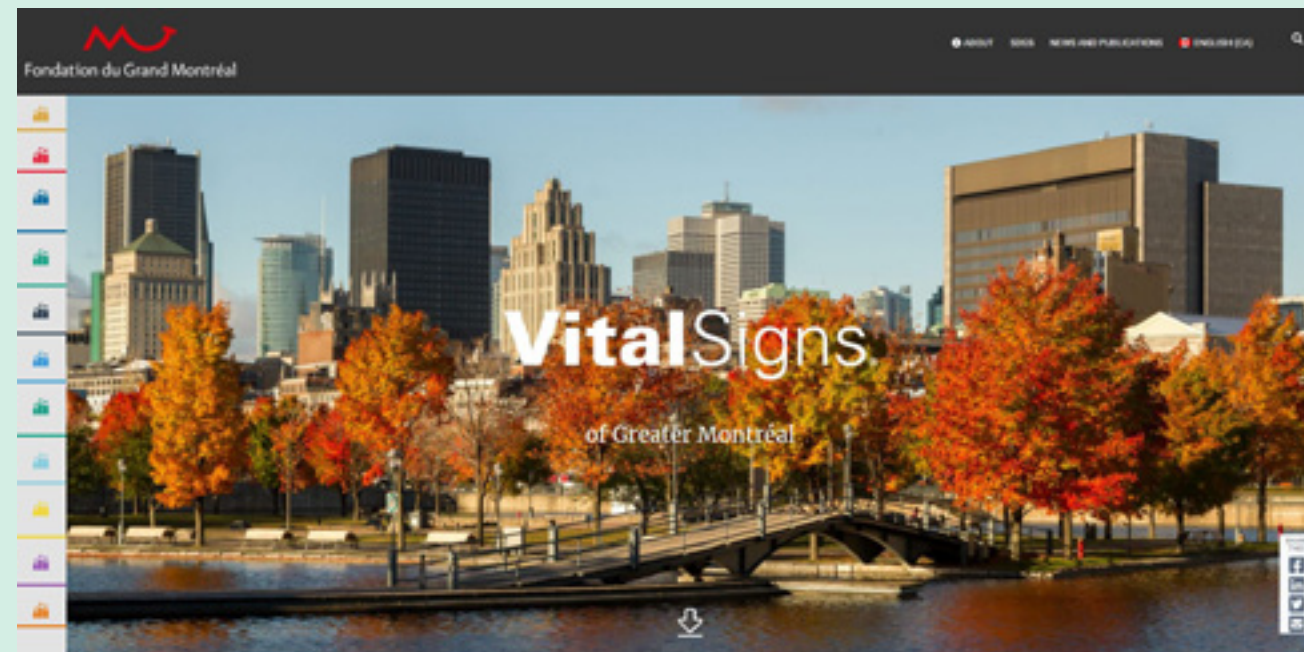
## VITAL SIGNS OF GREATER MONTREAL

Vital Signs, an initiative of Community Foundations of Canada (CFC), is the largest data collection program on Canada's communities. The *Vital Signs* reports are published by 65 Canadian community foundations. They measure these communities' health, identify major trends, and use key indicators to determine the priorities for action in every area that has a significant impact on quality of life.

In publishing the *Vital Signs* of Greater Montreal reports, the Foundation of Greater Montréal aims to **stimulate societal reflection and dialogue in Montreal, and raise awareness of immediate needs and long-term challenges**. These reports are also useful guides for donors and for those who create funds at FGM, as well as those who wish to target their philanthropic action where the needs are most pressing. The most recent edition of *Vital Signs of Greater Montreal* was published in 2020. Coinciding with the Foundation's 20th anniversary, this special edition focused on the evolution of several barometers of quality of life over the last 20 years, as seen through the prism of the SDGs, and also gave voice to a new generation of leaders, giving them a platform from which to lay out their visions for the Greater Montreal of 2030.

In 2021, the Foundation **developed a new deployment strategy for Vital Signs**. One or two publications, centred around an SDG or a specific issue, will be produced each year, and launched with a public event. **The first report will be published in 2022 and focus on women and girls in Greater Montreal, with an emphasis on three key issues: violence, mental health and employability**. We will be paying special attention to intersectionality in discussing the individuals who are impacted: persons who are LGBTQ2S+, Indigenous, have a functional limitation, are immigrants, racialized, experiencing homelessness, teenagers, elderly or single parents. The study will be conducted on both the quantitative and the qualitative level by the Institut du Québec, assisted by a working group of women experts who are immersed in these issues on the ground.

In parallel, FGM participated in the development of a **Vital Signs data platform** in collaboration with the Community Foundations of Canada network (CFC). We also participated in CFC's **Vital Conversations**, with the broadcast of its panel discussion on the situation of women and girls in the metropolitan area, on the occasion of the Women's Impact Montreal (WIM) Collective Fund launch.



Vital Signs data platform developed by the Community Foundations of Canada network. [montreal-vital-signs-tracking-progress.org/ca](https://montreal-vital-signs-tracking-progress.org/ca)

## PROMOTING PHILANTHROPY



Online launch of the *Étude sur les tendances en philanthropie*.

Épisode launched the eighth edition of the *Étude sur les tendances en philanthropie: Mise au point philanthropique*

In order to stimulate the development of philanthropy as a significant lever for well-being in Greater Montreal, and participate in reflections on issues facing the region, FGM has also become a partner in several initiatives.

It is participating in the **Will Power campaign**, a cross-Canada initiative launched by the Canadian Association of Gift Planners in order to promote, and demystify, this giving vehicle. The campaign's website gives access to tools, testimonies and tips for getting potential donors thinking about planned giving and about the positive, lasting and tangible impact it can have on the development and the well-being of the community.

As well, our President and CEO contributed to the **2022 edition of the reference work *L'état du Québec***; in it, he discussed the role of community foundations and the major impact that planned giving can have on the development and well-being of Quebec's communities.

Over the course of 2021, **FGM was also involved in the Institut Mallet's major reflection process, "Chantier sur l'agilité des organisations philanthropiques au Québec"**. As a member of the steering committee, Marie-Andrée Farmer, who is our Director, Strategic Initiatives and Community Partnerships, identified Montreal non-profit organizations that can be considered agile, with a view to having them participate in the discussion process. The research will continue in 2022.

On November 10, in a special virtual event, **Episode**, a firm of expert consultants in philanthropy and community investment, **launched the eighth edition of the *Étude sur les tendances en philanthropie: Mise au point philanthropique (Study of philanthropic trends: Where we stand)***. This publication, which has now become a reference for non-profits as well as for businesses, is **available free of charge thanks to the support of several partners, including the Foundation of Greater Montréal**. Karel Mayrand, FGM's President and CEO, participated in the launch via a short video in which he explained how this research benefits the philanthropic sector.

On November 15, for **National Philanthropy Day**, Karel Mayrand was the guest speaker at an event entitled "Comment le secteur philanthropique se mobilise face à la crise climatique!", which was organized by the Quebec branch of the Association of Fundraising Professionals.

The Foundation, through its Vice President, Philanthropy and Community, Tasha Lackman, also maintained its participation **as a member of PhiLab's management committee**. The committee explores the major trends in philanthropy, with a view to selecting the themes that will be covered in research projects, newsletters and conferences. It helps produce major events and mobilizes its resources to support data collection and the dissemination of findings. FGM and PhiLab also entered into a research partnership in the spring, to examine in depth the issues related to philanthropic practices in equity, diversity and inclusion (EDI), as referenced earlier in these pages.

## DISSEMINATION OF KNOWLEDGE

This year, FGM rolled out a series of *FGM Rendez-vous*, an initiative aiming to promote philanthropy as well as exchanges of views and the dissemination of knowledge. As webinars or events, these get-togethers, either private or public, addressed a variety of topics relating to philanthropy, the community sector, and issues in our society. The public sessions are placed on the Foundation's YouTube channel after the event.



On February 24, 2021, the first FGM Rendez-vous was held, in collaboration with the Fondation J. Armand Bombardier, addressing the topic of the well-being and health of workers in the community sector. On March 31, fund creators had the chance to meet Nakuset, Executive Director of the Native Women's Shelter and co-manager of Resilience Montreal. On April 7, a conversation was held with the Afrique au féminin organization on the theme of food management during the pandemic. On May 18, donors to the FGM COVID-19 Collective Fund heard about the positive results of the Fund's activity, and were also presented with its Impact Catalogue. Lastly, on September 23, the WIM Fund was launched via an FGM Rendez-vous. On that occasion, FGM presented a panel focusing on the current situation of women and girls in the metropolitan area, in partnership with the Centre for Sustainable Development.

As was mentioned earlier, in August, **the Foundation of Greater Montréal and the Centre for Sustainable Development announced a partnership** that will enable both organizations to strengthen their capacity to carry out their mandates to **disseminate knowledge related to sustainable development**, and to search for solutions to the numerous challenges faced by the Montreal community in this respect.

The Foundation of Greater Montréal is also a **member and funding partner in the Indicators of well-being in Quebec project**. Under the aegis of the collective known as G15+, 20 organizations from the economic, financial, social, labour, environmental, academic and philanthropic sectors have created a list of 51 economic, social and environmental indicators that can be used to measure the level of well-being in the province. This process, which is carried out throughout the year, draws on the relevant literature, on initiatives from across the globe, and on a rigorous methodology validated by experts from the member and partner organizations. The indicators were made public in January 2022, and are available online. [www.indicateurs.quebec](http://www.indicateurs.quebec)

Our Director, Strategic Initiatives and Community Partnerships, Marie-Andrée Farmer, represented FGM in the fall as a **member of the jury** evaluating projects submitted for the "Des communautés résilientes post-COVID" initiative of the Centre-South CIUSSS of the Island of Montreal. In the spring, Patricia Letarte, Project Manager, Community Projects, was on the jury for Fusion Jeunesse's Environmental Design program.

**Our CEO was a participant on several panels.** In March, he spoke at a meeting on the pandemic organized by the Vivre en Ville organization and also at a "Vital Conversation" following up on the RBC Future Launch Community Challenge. In April, he was interviewed by Déborah Cherenfant, then President of the Junior Chamber of Commerce of Montreal, and in May, he hosted a panel organized by the Amis des parcs organization on territorial and environmental equity as it relates to Montreal's parks. In June, at the Community Foundations of Canada Virtual Summit, he participated in a discussion on the fight against climate change. At the same event, Tasha Lackman, Vice President, Philanthropy and Community, was asked to speak about transferring power in the granting process. In July, she participated in an event for the Foundation for Black Communities, involving organizations run by, and working for, Black individuals. And in August, she was invited to be part of a discussion set up by Sustainable Development Solutions Network Canada, Green Beacon and the Tamarack Institute on the role of the Sustainable Development Goals in community recovery.

Also in August, Karel Mayrand moderated a panel for CIRODD (Centre interdisciplinaire de recherche en opérationnalisation du développement durable) during its Summer School, on the resilience of our cities and communities. In October, he spoke about SDG issues specific to Quebec during an online event organized by Esplanade. Finally, in November, he was a panelist at the Climate Dialogues.



Karel Mayrand interviewed by Déborah Cherenfant, then President of the Junior chamber of Commerce of Montreal, on "Combien de temps avant une transition écologique?" (How long will it take to get to an ecological transition?).

# RAISING FGM'S PROFILE

The Foundation increased its visibility in 2021, as FGM was mentioned 650 times in the media, a figure that was up by 86 % over last year. Karel Mayrand published several open letters in L'Actualité and La Presse, and gave interviews to numerous media on philanthropy (Le Devoir, La Presse, Le Soleil, Vues et voix radio, PhiLab, etc.) and on climate change (Radio Canada/Le Téléjournal 18 h, radio station 98.5FM/Le Québec maintenant), in particular. Other FGM leaders were also the subject of media attention: Kathy Fazel, Chair of the Board of Directors (the magazine Premières en affaires; the Association of Quebec Women in Finance; International Women's Forum), Tasha Lackman, Vice President, Philanthropy and Community (several mentions stemming from the press conference on the funding of Resilience Montreal), and Hélène Latreille, Primary Advisor, Philanthropic Development and Professional Partnerships (La Presse). As well, numerous initiatives supported by FGM funds also garnered coverage in the media.







## Social media

FGM also continued to flourish on social media in 2021:

**+ 22 %**  
Number of followers

**+ 86 %**  
Number of posts

-  On LinkedIn, the Foundation had 49% more followers, and posted 315 times, with the posts getting 128,000 impressions, a 32% increase.
-  Facebook is still the social network on which we have the most followers, 2,340; FGM posted 311 times for 81,700 impressions.
-  Instagram showed significant progress, with 49% more followers, 302 posts (a 160% increase) and 62% more impressions.
-  Twitter is where we have our largest reach and the highest number of posts, with 159,000 impressions and 684 posts in 2021.

## Newsletter

Our newsletter, which was revamped in 2020 and now features a topic that is in the news and linked to the SDGs each month, **continues to increase in popularity**. Its open rate is well above the average for the non-profit sector, and the comments we receive on the content are positive.

## Website

FGM's new website was finalized this year. Officially launched in January of 2022, it has a more modern look and added functionality. A showcase for our new projects, it will help us stay in touch with everyone connected to the Foundation, enhance the quality of our services to the community, and highlight additional inspiring stories and useful information relating to the issues that concern us all.



# Governance and financial information

**Governance**

**FGM: Key numbers**

**Summarized financial statements**

**Team**



# Governance

To support the work of the Board of Directors, FGM has formed five permanent committees, made up of directors, but also of external members from the community, from all walks of life. An ad hoc committee, made up of members of the Board, also met periodically to approve certain grants. The Foundation, since 2020, also has a provisional committee on justice, equity, diversity and inclusion, made up of members of the Board and staff.



## BOARD OF DIRECTORS

### Report of the Board of Directors

In 2021, the Board of Directors held 11 meetings, against the backdrop of the continuing COVID-19 pandemic. Board members worked on several files with a view to realizing goals that had been set out in the 2018-2021 Strategic Plan, all while preparing the next five-year plan. The members most notably:

- approved annual work plans for the committees of the Board, as well as budgets and financial statements for FGM and the FGM Investment Fund;
- recruited two new directors;
- Participated in the development of the 2022-2026 Strategic Plan, then ratified it;
- adopted the Responsible Investment Strategy;
- created a Philanthropic Development Committee;
- ensured the continuity for the next five years of two FGM programs, the Collective Fund for Social Equity and the Collective Fund for Climate and Ecological Transition;
- adopted a territorial acknowledgment with respect to the Indigenous presence on the territory we share;
- adopted an inclusive writing style, as part of its work on justice, equity, diversity and inclusion;
- adopted the statement "Pour combattre les inégalités, des engagements pour la philanthropie (Commitments for the philanthropic sector in the fight against inequalities)" put forward by the Collectif des Fondations québécoises contre les inégalités;
- revised certain policies pertaining to governance.

Two individuals left the Board in 2021, but have remained engaged with FGM by sitting on committees, the Philanthropic Development Committee and the Audit Committee respectively. They are the Hon. Jean-François de Grandpré, who had been a board member since 2013 and Board Chair starting in 2017, and Laurent Giguère, who had been a board member since 2015 and Treasurer as of 2017. I want to convey to them my sincere gratitude for all their work and devotion.

I also want to sincerely thank the sitting members of the board, the external members of board committees, the CEO, and all the staff at FGM. Together, we constitute a strong team that has enabled FGM to become everyone's foundation.

**KATHY FAZEL, CFA, IAS.A**  
Chair of the Board of Directors

## Directors' attendance at Board meetings in 2021

DIRECTORS	OFFICERS	TOTAL NUMBER OF BOARD MEETINGS DURING MANDATE	NUMBER OF MEETINGS ATTENDED	COMMENTS
Kathy Fazel	Chair	11	11	
Karen Macdonald	Vice-Chair	11	11	
Éric Lapierre	Secretary	11	9	
Toni Dilli	Treasurer	11	11	
Nadir André		11	11	
Corinne Charette		6	6	Mandate began May 2021
Jean-François de Grandpré		5	5	Mandate ended May 2021
Laurent Giguère		5	5	Mandate ended May 2021
Suzanne Gouin		11	11	
Pascal Grenier		11	11	
Grace Laing Hogg		11	11	
Frédéric Lavoie		11	11	
Angelina Mehta		11	10	
Jane Rabinowicz		6	6	Mandate began May 2021
Nadine Raymond		11	10	
Louis Charles Riopel		11	8	
Kenny Tang		11	11	
Diane Tsonos		11	10	

## Members of the Board of Directors



**KATHY FAZEL, CFA, ICD.D**  
**Chair**  
 Senior Investment Counsellor  
 RBC PH&N  
 Investment Counsel



**KAREN MACDONALD**  
**Vice-Chair**  
 News Director and Station Manager  
 Global TV Montréal



**ERIC LAPIERRE LL. B.**  
**Secretary**  
 Assistant Vice-President and Senior Legal Counsel  
 Manuvie



**TONI DILLI CPA, CA, CFA**  
**Treasurer**  
 Partner, audit  
 KPMG



**NADIR ANDRÉ LL. B.**  
 Partner  
 BLG



**CORINNE CHARETTE**  
 Senior Fellow,  
 John Molson School of Business  
 Concordia University



**SUZANNE GOUIN**  
 Corporate Director



**PASCAL GRENIER**  
 CEO  
 Campus de la transition écologique



**GRACE LAING HOGG**  
 Coordinator  
 George Hogg Family Foundation



**FRÉDÉRIC LAVOIE CPA, CA**  
 Partner  
 PwC



**ANGELINA MEHTA**  
 General Manager of Joint Ventures  
 Rio Tinto Aluminium



**JANE RABINOWICZ**  
 Chief Program Officer  
 McConnell Foundation



**NADINE RAYMOND**  
 CEO  
 Montreal YWCA



**LOUIS CHARLES RIOPEL**  
 Founder and Managing Partner  
 Latitude 45°



**KENNY TANG CFA, CPA, CA, FRM**  
 Chief Compliance Officer and ESG Leader  
 Trans-Canada Capital Inc.



**DIANE TSONOS TEP, LL. B., TEP**  
 Tax Partner and Lawyer  
 Richter LLP



**HON. JEAN-FRANÇOIS DE GRANDPRÉ\***  
 Retired Judge  
 Superior Court of Québec



**LAURENT GIGUÈRE FCPA, FCA, ICD.D\***  
 Former Partner  
 KPMG

\*Outgoing Members in 2021

## Renewal on the Board of Directors

The Annual General Meeting (AGM) was held in May, once again in a virtual fashion.

After eight years as a member of the Foundation's Board, including five as its Chair, The Hon. Jean-François de Grandpré chose 2021's AGM as the moment for the passing of the torch. Under his direction, and thanks to his leadership, FGM embarked on many new initiatives and major partnerships, revamped its services to the community, deepened its roots and strengthened its impact throughout Greater Montreal. **Thank you, Jean-François!**

As a result of the elections of Kathy Fazel as Chair of the Board, and of Karen Macdonald as Vice Chair, **FGM is – for the first time since its founding in 2000 – headed up by an all-female senior leadership**, which is in perfect alignment with the Foundation's renewed commitment to gender equality.



The Hon. Jean-François de Grandpré, outgoing Chair of the Board of Directors.

## COMMUNITY ENGAGEMENT COMMITTEE

### Report of the Community Engagement Committee

In 2021, the Community Engagement Committee accelerated a process it had begun in 2020, in particular seeking to reinforce equity and inclusiveness in the Foundation's granting programs. In parallel with its participation in the development of the **2022-2026 Strategic Plan** for the Foundation of Greater Montréal (FGM), the Committee also sought new ways of reconciling the imperatives of governance with the need to involve representatives of the community, the need to listen more actively, and the work of transferring power in a manner that is in keeping with the Foundation's philanthropic vision.

This work led to the creation of two new funds at FGM. With the **Collective Fund for Climate and Ecological Transition**, our goal was to set out – for the first time – a strategic response to the global challenge that is defining our era. This is a novel approach that will result in FGM supporting foundational initiatives that will, over the medium and long term, reinforce our community's resilience in the face of climate change. The work starts now, but it is being carried out with a view to assisting future generations, too.

As regards the **Collective Fund for Social Equity**, our goal was to enhance the Foundation's capacity to listen to the needs of the community, and more particularly those groups that have been historically marginalized or ignored by the philanthropic sector. By integrating the principles of trust-based philanthropy, the Fund's approach enables the inclusion of new voices and helps us eliminate some of the blind spots in our decision-making process. We were therefore able, for instance, to create a special funding envelope to support organizations from Greater Montreal's Indigenous communities, and thereby contribute to the Reconciliation process.

As we went through the stages of this initiative, we felt it was vital to bear in mind that how we do things is as important as the goals we set for ourselves. In working to deconstruct the inequalities and the power dynamics inherent in the traditional philanthropic model, and in making sure we were not actually aggravating on the one hand the problems we tried to tackle with the other hand, we do think we ultimately improved our ways of doing things this year. Obviously, the learning process is not yet over, and never really will be. In 2022 and beyond, we will continue to question our practices, evaluate the results they yield on the ground,

and draw the appropriate conclusions from those results. In fact, we also formed a sub-committee whose job it will be to render an accounting of the results of this initiative, in light of the fact that the Board of Directors of the Foundation has agreed to keep the two new funds going for the duration of the 2022-2026 Strategic Plan.

In closing, no review of this past year would be complete without highlighting the fact that FGM continued to respond to the pandemic through the greater part of 2021. The support afforded by members of the COVID Quebec Consortium for a community response to COVID-19 continued until last autumn, and in total, investments in the amount of \$8,687,900 were allocated in aid of nearly 200 organizations. That initiative and others enabled FGM to steer emergency aid to those who are, even now, still suffering the most from the ramifications of the pandemic, and to whom we owe a continuing duty of support.

An indicator of the breadth of the Committee's work is that it met eight times in 2021, so two more times than it normally would have. I would like to very sincerely thank each of its members – the veterans as well as the newcomers, André-Yanne Parent and Corinne Charette – for their unrelenting efforts and their commitment to the new vision we are now creating.

#### M<sup>E</sup> DIANE TSONOS, LL. B., TEP, CHAIR

Board member, FGM  
Tax Partner and Lawyer  
Richter LLP

### Other members of the Community Engagement Committee

#### NADIR ANDRÉ, LL. B.

Board member, FGM  
Partner  
BLG

#### PASCAL GRENIER

Board member, FGM  
CEO  
Campus de la transition écologique

#### ART CAMPBELL

Regional director, Reintegration  
and Social Inclusion  
The YMCA of Quebec

#### MALVINA KLAG

Organizational Development and Systems  
Change Strategist

#### CORINNE CHARETTE

Board member, FGM  
Senior Fellow, John Molson School of Business  
Concordia University

#### GRACE LAING HOGG

Board member, FGM  
Coordinator  
George Hogg Family Foundation

#### ANDREA CLARKE

Director of Community Engagement  
and Social Impact  
Concordia University

#### ANDRÉ-YANNE PARENT

Executive Director  
Climate Reality Project Canada

#### JUNIPER GLASS

Consultant for Non-Profits and Foundations  
Lumiere Consulting

#### DANIELLE SAUVAGE

Board member, FGM  
Consultant in Cultural Management

# INVESTMENT COMMITTEE

## Report of the Investment Committee

As of December 31, 2021, the assets of the Foundation of Greater Montréal Investment Fund (FGMIF) totalled \$374.9M, an increase of \$37.6M over the previous year. This increase is the result of a net realized investment income of \$26.1M, a net contribution of \$7.9M (gross contributions of \$26.8M and withdrawals of \$18.9M) and an unrealized change in the fair market value of investments of \$3.6M. The FGMIF's gross return on investment for 2021 was 9.15%, and its annualized return over five years stood at 8.49%. Looking at the FGMIF's investments, four out of seven actively managed funds outperformed their benchmark indices, while indexed funds, in general, performed in line with their benchmark indices. The real estate fund added stability to the portfolio, producing solid returns and showing an increase in value on some properties. When we add the FGM assets managed outside of the FGMIF, total assets reach \$422M.

In order to achieve the FGMIF's objective of generating sufficient returns on investment to secure philanthropic distributions, while at the same time covering the costs required to ensure sound management and preserve in part the purchasing power of the capital, the Committee focused its energies on monitoring the performance of the portfolio and reviewing its investment policy. The Committee paid particular attention to the selection of alternative assets within its portfolios, with the objective of reducing the FGMIF's market risk while maintaining its potential to generate returns.

In 2021, with the support of the Working Group on Responsible Investment, the Committee participated in the development of a responsible investment policy, which was approved by the Board of Directors at its October 20, 2021 meeting. The Foundation's financial assets and the management of those assets have a direct impact on the organization's capacity to achieve its goals. Adopting a responsible investment strategy is meant to be a complement to a global conventional approach to investment risk; it aligns the organization's values with the positive impact it seeks to have in the Greater Montreal community while also recognizing the importance of ESG (Environmental, Social and Governance) criteria. Having established the pre-condition that our investment targets relative to risk and return must be met; our goals in terms of ESG integration are: i) the integration, by 2024, of ESG criteria in the identification and selection of investments for the Foundation's entire portfolio; and ii) the implementation over time of an investment portfolio by managers with excellent ESG ratings.

In 2021, in addition to ensuring the application and the adequate progress of its investment policy, the Committee met with the main investment fund managers, evaluated the external investment manager and made a recommendation to the Board of Directors regarding an appropriate payout ratio. Seeing as how 2021 brought strong returns and the FGMIF's growth was maintained, the Investment Committee recommended that the payout ratio be kept at 3.75 % in 2022. This rate was recommended based on 2021 performance, but also on reserves accumulated over the last few years; it also takes into account the challenges which community-based organizations are facing in the context of a global pandemic while still ensuring that future distributions are secured. The Board of Directors adopted the Committee's recommendation at its December 8, 2021 meeting.

I would like to thank all the members who actively participated in the Committee's work; we met five times in 2021.

**LOUIS CHARLES RIOPEL, CHAIR**  
Board member, FGM  
Founder and Managing Partner  
Latitude 45°

## Other members of the Investment Committee

**VALÉRIE CECCHINI, M.SC., CFA, CPA, CGA**  
Managing Partner  
Borealis Global Asset Management

**GILLES CHOUINARD**  
Vice-President of Investments  
Association de bienfaisance et de retraite des policiers et policières de la Ville de Montréal

**HÉLÈNE GAGNÉ**  
Portfolio Manager  
Gagné Johnston Private Wealth  
(PEAK Securities)

**RICHARD GUAY, PH.D., CFA, FRM**  
Full Professor of Finance  
ESG-UQAM

**PETER TULLY**  
Portfolio Manager

### Outgoing Members in 2021

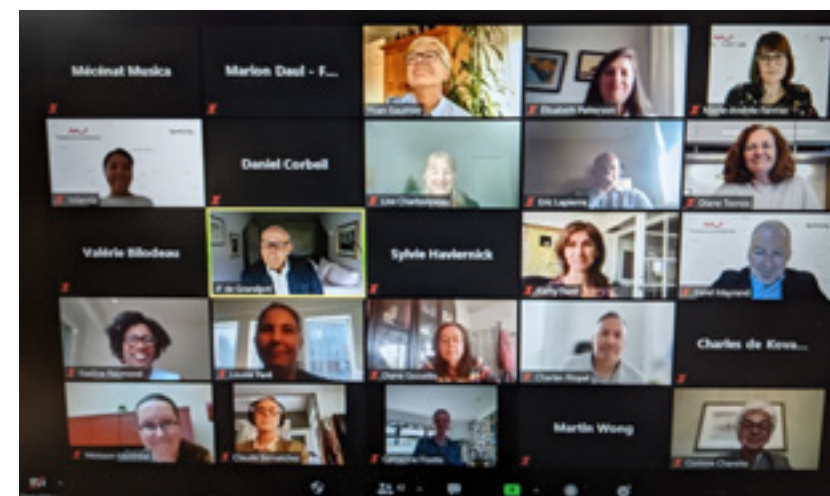
**NORMAND GRÉGOIRE**  
Former Vice-President of Investments  
Lucie and André Chagnon Foundation

**ERIC LAPIERRE, LL. B.**  
Secretary of the Board of Directors, FGM  
Assistant Vice-President and Senior  
Legal Counsel  
Manuvie

**NADINE RAYMOND**  
Board member, FGM  
CEO  
Montreal YWCA

## Meeting on the results of the FGM Investment Fund

For a second year in a row, the meeting with fund creators was held in a virtual manner, in May. It nonetheless drew more than 50 attendees via Zoom.



The meeting on the results of the FGM investment fund was held on May 25.



## Responsible investment and changes to the investment policy

Attuned to environmental concerns and to the principle of impact investment, as well as calls from current and potential fund creators for the adoption of a responsible investment policy, FGM's Board of Directors launched a Working Group on Responsible Investment in the fall of 2020. Assisting the Investment Committee, this group had a mandate to develop, then submit to the Board, a responsible investment policy that included measurable objectives, a timetable and a roadmap for implementation.

The Working Group, made up of eight members (including at least four FGM board members), met seven times. It made sure that the Investment Committee was kept informed every step of the way, and that it contributed to the development of the new policy.

Here are the main changes to the investment policy:

- **Seven principles of investment (including justice, equity, diversity, inclusion and reconciliation with Canada's First Peoples), which echo the values enunciated by FGM in its new strategic plan, have been incorporated into the policy.**
- **The policy will maintain the same goals, asset mix and risk/return ratio as the preceding policy, but will also integrate ESG (environmental, social and governance) criteria in its investment choices.**
- **Impact investment as a practice was defined, and a first investment of this nature should occur by 2023.**
- **As data become available and evaluation criteria are developed in detail, the policy provides for more transparent communication of both financial results and ESG results.**
- **FGM will practice shareholder activism, mainly through the monitoring of the voting practices and the shareholder engagement of the external managers.**
- **FGM will adopt a policy for managing climate risk, including a 45% reduction target in carbon emissions from its asset portfolio by 2030, and carbon neutrality by 2050, in conformity with the Paris Agreement.**
- **There shall be no investments in the tobacco or arms sectors, nor in gaming or adult content.**
- **The new policy favours hiring locally if managers are of equal talent.**
- **The evaluation of the external investment manager will also be based on their capacity to support FGM in the implementation of its responsible investment policy.**

FGM wishes to thank Valérie Cecchini, who drafted the new policy incorporating our principles of responsible investment, Louis Charles Riopel, Chair of the Investment Committee, who helped finetune it and had his Committee adopt it, Nadine Raymond, Chair of the Working Group on Responsible Investment, who secured its adoption by the Board, as well as everyone involved in the Working Group and in this process.

## Working Group members

### **NADINE RAYMOND**

Chair of the Working Group  
and Board Member

### **VALÉRIE CECCHINI**

External member

### **LISE CHARBONNEAU**

Vice-President, Administration,  
Finance and Investments, FGM

### **KATHY FAZEL**

Chair of the Board

### **PASCAL GRENIER**

Board Member

### **KAREL MAYRAND**

President and CEO, FGM

### **ANGELINA MEHTA**

Board Member

### **KENNY TANG**

Board Member



# GOVERNANCE AND HUMAN RESOURCES COMMITTEE

## Report of the Governance and Human Resources Committee

The Governance and Human Resources Committee met eight times in 2021. Over the course of the year, it notably:

- Recommended to the Board of Directors two new members for the Board and one new member for the Investment Committee, all women;
- Analyzed the results of a survey of FGM employees and managers regarding their workplace experience and put forward appropriate recommendations;
- Revised the tools used to evaluate the output of the Board of Directors, the Committees and their members, then proceeded to the relevant annual evaluations in all cases;
- Revised the collective skills matrix for members of the Board of Directors and for Committees;
- Supported the Board in its initiative to create the new Philanthropic Development Committee;
- Supported FGM leadership in its adoption of a policy for intake and management of complaints coming from entities that deal with FGM;
- Supported FGM leadership in its adoption of an inclusive writing style;
- Supported FGM leadership in its systematic review of human resources;
- Recommended to the Board a new total payroll for FGM staff.

### SUZANNE GOUIN, CHAIR

Board member, FGM  
Corporate Director

### Other Members of the Governance and Human Resources Committee

#### ERIC LAPIERRE, LL. B.

Secretary of the Board of Directors, FGM  
Assistant Vice-President and Senior Legal Counsel, Manuvie

#### FRÉDÉRIC LAVOIE, CPA, CA

Board member, FGM Partner  
PwC

#### KAREN MACDONALD

Vice-Chair of the Board of Directors, FGM  
News Director and Station Manager  
Global TV Montréal

#### ANGELINA MEHTA

Board member, FGM  
General Manager of Joint Ventures  
Rio Tinto Aluminium

#### Outgoing Member in 2021

#### KATHY FAZEL

Chair of the Board of Directors, FGM  
Senior Investment Counsellor  
RBC PH&N Investment Counsel

# AUDIT COMMITTEE

## Report of the Audit Committee

Since its inception, FGM has been committed to maintaining standards of excellence in both financial management and accountability. In this regard, the Board of Directors, by way of the Audit Committee, ensures that sound governance practices are being maintained.

The Audit Committee is currently composed of seven individuals: five members of the Board of Directors and two independent external members.

The Committee met six times in 2021 to follow up on FGM's and the Foundation of Greater Montréal Investment Fund (FGMIF)'s quarterly and annual financial results, including the budget preparation process and its periodic monitoring, and to move things forward regarding various issues including: follow up of the cybersecurity work plan, update of the risk management dashboard and business continuity plan, review and update of administrative policies, monitoring of compliance with various legal requirements, review of results of the annual audit, and evaluation of the auditor.

The Foundation's financial results for 2021 are excellent, even surpassing budgetary objectives and generating an excess of revenues over expenses of \$43M. New contributions received and good market returns resulted in FGM's investments increasing in value from \$244M to \$281M during the period ending December 31, 2021. As for the FGMIF, the fund went from \$337M to \$375M, an increase of \$38M. If we add up FGM's investments and those it manages for other organizations, the funds managed by the Foundation totalled \$422M as at December 31, 2021, an increase of \$49M over the previous year. Thanks to the trust our donors placed in us as well as the contributions received through government programs, donations to FGM reached nearly \$48M in 2021.

### TONI DILLI, CPA, CA, CFA, CHAIR

Treasurer of the Board of Directors, FGM  
Partner, Audit  
KPMG

### Other Members of the Audit Committee

#### LAURENT GIGUÈRE FCPA, FCA, ICD.D

Former Partner, KPMG

#### FRÉDÉRIC LAVOIE, CPA, CA

Board member, FGM Partner  
PwC

#### J. GILLES NOLET

Executive Coach  
Nolet Coaching

#### JANE RABINOWICZ

Board member, FGM  
Chief Program Officer  
McConnell Foundation

#### LOUIS CHARLES RIOPEL

Board member, FGM  
Founder and Managing Partner  
Latitude 45°

#### KENNY TANG, CFA, CPA, CA, FRM

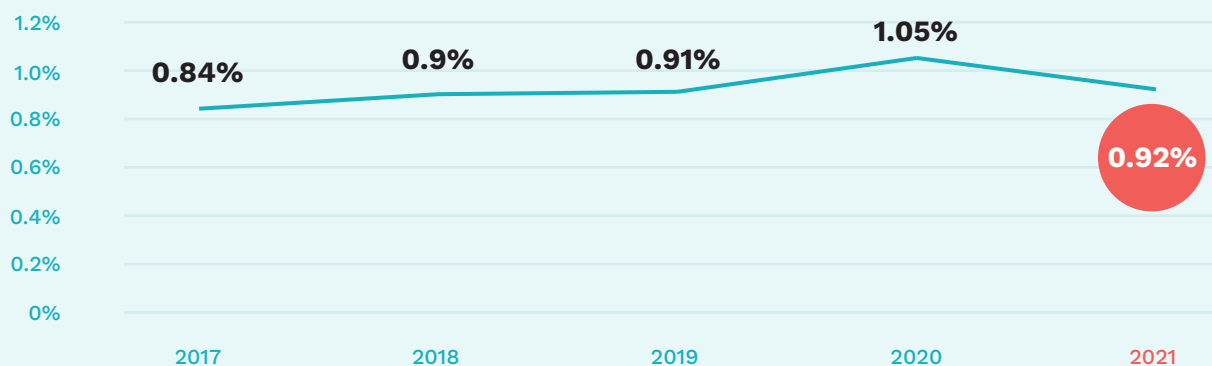
Board member, FGM  
Chief Compliance Officer and ESG Leader  
Trans-Canada Capital Inc.

#### Outgoing Member in 2021

#### ANGELINA MEHTA

Board member, FGM  
General Manager of Joint Ventures  
Rio Tinto Aluminium

### OPERATING COSTS AS A % OF AVERAGE TOTAL ASSETS\*



\* Average Total Assets include assets on FGM's balance sheet and Managed funds

## JUSTICE, EQUITY, DIVERSITY AND INCLUSION COMMITTEE

### Report of the Justice, Equity, Diversity and Inclusion Committee

Recently, our community and its institutions have finally started to become aware of the importance in our society of giving an equal chance to all, and of representing diversity. The Foundation's team aspires to be a true mirror of the community it serves, and in that vein undertook a process of reflecting on Justice, Equity, Diversity and Inclusion (JEDI), followed by a major initiative to search for solutions. FGM staff and volunteers thus began by learning, and then moved on to concrete action.

The JEDI Committee, made up of Board members and staff and initiated in 2020, met on eight occasions in 2021 in order to move several projects ahead, including the drafting of a guide to inclusive writing. In addition, staff, Committee members and Board members participated in several training sessions given by outside experts, including the peer learning program JEDI Accelerator, as well as in various reflection and discussion groups. The 2022-2026 Strategic Plan, developed in 2021, also emphasizes that the values of justice, equity, diversity and inclusion are at the heart of FGM's vision and mission for the future. In that spirit, FGM also adopted a JEDI statement, and made JEDI one of its six priorities for intervention. These principles were also incorporated into FGM's new responsible investment strategy. Finally, a plan setting out concrete measures will be established in 2022, so as to include these values in all the Foundation's actions in a cross-sectoral way.

#### KAREN MACDONALD, CHAIR

Vice-Chair of the Board of Directors, FGM  
News Director and Station Manager  
Global TV Montréal



### Other Members of the Justice, Equity, Diversity and Inclusion Committee

**NADIR ANDRÉ, LL. B.**  
Board member, FGM  
Partner  
BLG

**PASCAL GRENIER**  
Board member, FGM  
CEO  
Campus de la transition écologique

**FRÉDÉRIC LAVOIE CPA, CA**  
Board member, FGM  
Partner  
PwC

**JANE RABINOWICZ**  
Board member, FGM  
Chief Program Officer  
McConnell Foundation

And several FGM staff members

Lise Charbonneau  
Catherine Fisette  
Tasha Lackman  
Sofia Laroussi  
Yolanda Macias Schaffner  
Karel Mayrand  
Aloun Vongsipraseuth

## PHILANTHROPIC DEVELOPMENT COMMITTEE

In 2021, the Board created a new permanent committee responsible for FGM's philanthropic development. It will be tasked with developing strategies for promoting philanthropy on our territory, raising the profile of the Foundation and its services, and nurturing strong relationships with present and future donors. To do so, it will highlight the Foundation's mission, vision and values, all in collaboration with the Philanthropic Development unit.

### Members of the new Philanthropic Development Committee

**FRÉDÉRIC LAVOIE, CPA, CA, CHAIR**  
Board member, FGM  
Partner  
PwC

**HON. JEAN-FRANÇOIS DE GRANDPRÉ**  
Retired Judge  
Superior Court of Québec

**SAMIA MEDELICI**  
District Vice President, Laval and Rive-Nord  
TD Bank

**DIANE TSONOS, LL. B., TEP**  
Board member, FGM  
Tax Partner and Lawyer  
Richter LLP

**MAHALIA VERNA**  
Chief Strategy Officer  
Tripura Breath

# FGM: the key numbers

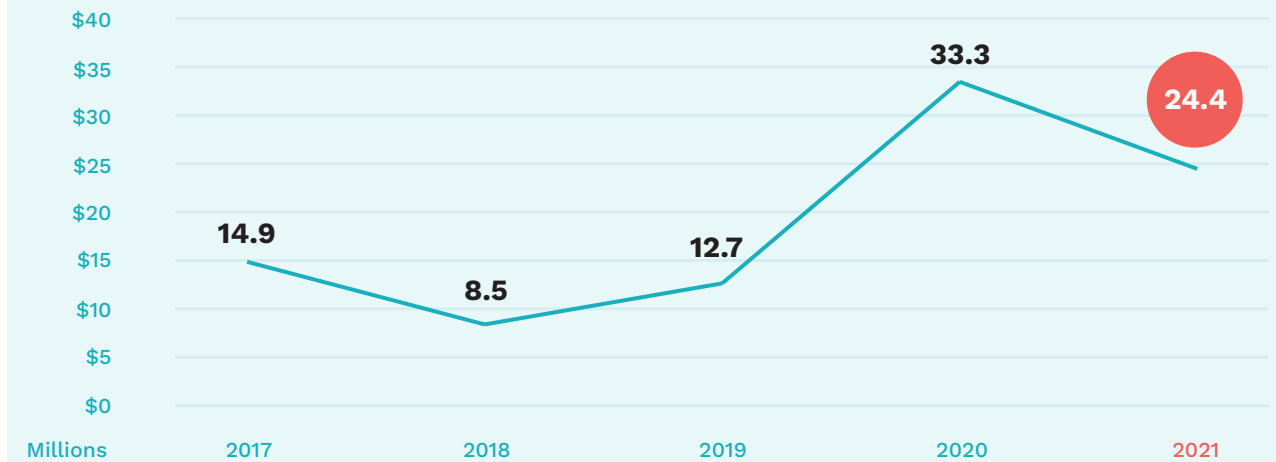
In 2021, FGM went above the **\$100 million mark in grants** disbursed to organizations since its founding. **In 2021 alone, \$24,419,688 was distributed to 538 organizations.** FGM's assets now total **\$422 million**, allocated over **752 funds**.

More than  
**\$24.4M**  
distributed for SDGs  
and culture in 2021



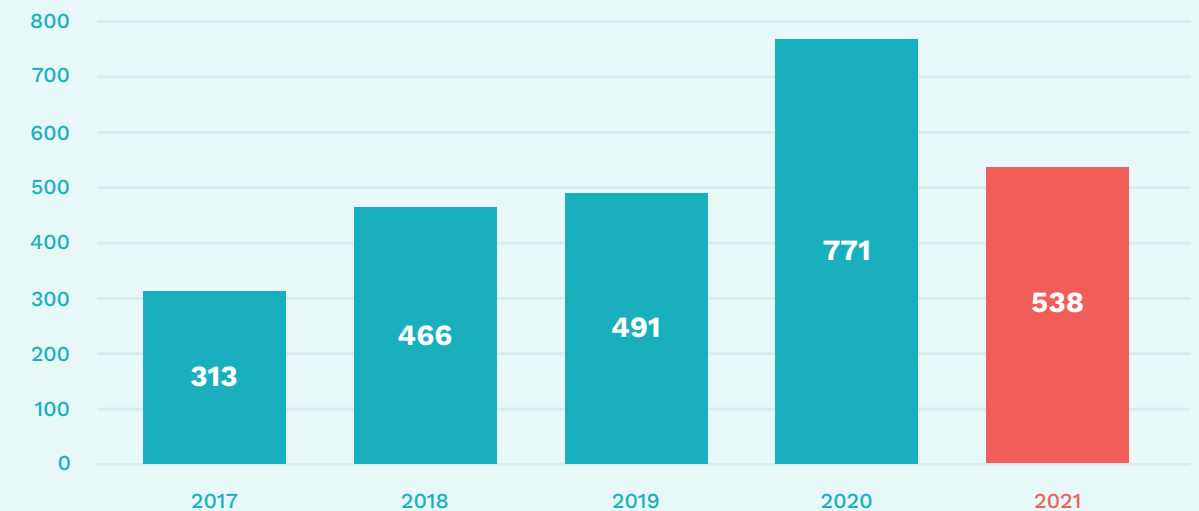
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TOTAL OF GRANTS DISTRIBUTED, IN MILLIONS OF DOLLARS



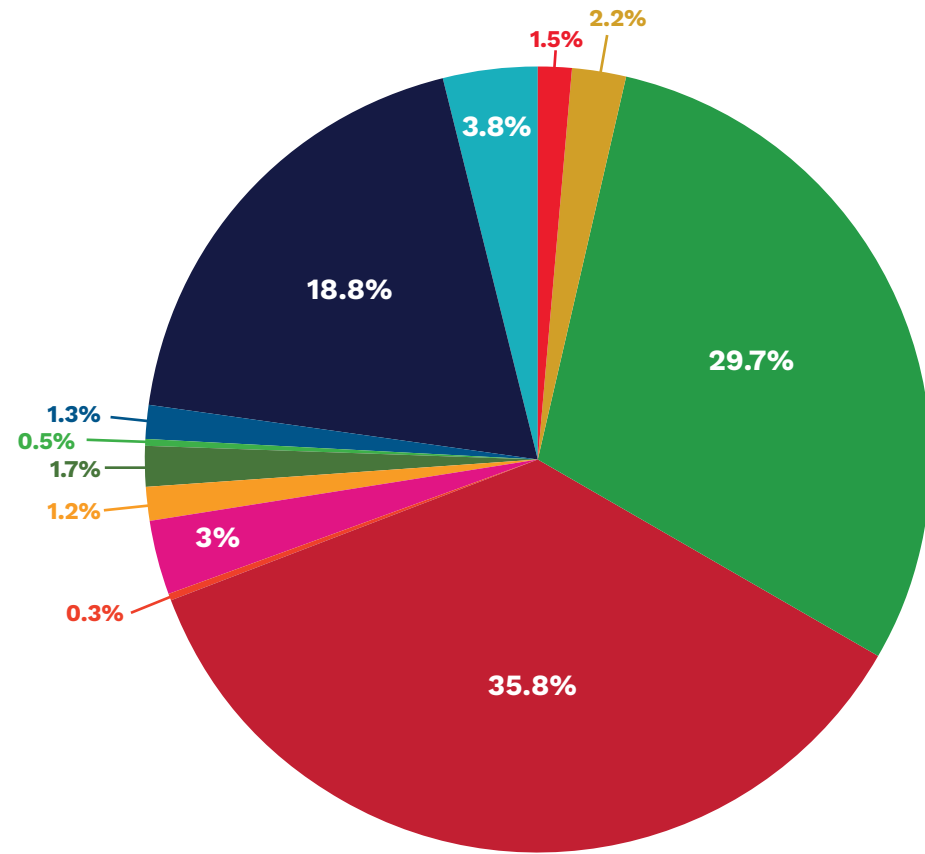
The marked increase in the amount of grants distributed for 2020 is attributable to the disbursement of more than \$10M by The Age of Union Foundation Fund, and by the allocation of \$10.6M from the Emergency Community Support Fund (ECSF). In 2021, nearly \$4.5M were transferred by the Fonds COVID Québec, and total distributions were higher. As well, in order to better respond to the greater needs faced by cultural organizations during the health crisis, FGM made its distribution policy more flexible; organizations holding in-perpetuity endowment funds could receive, beyond the fixed annual payout, a part of the surplus that had accumulated in their funds thanks to the FGMIF's excellent returns.

NUMBER OF RECIPIENT ORGANIZATIONS



The number of recipient organizations continued to increase relative to the years 2017 to 2019, a consequence of the increase in the total number of grants awarded, and of a better coverage of the territory we serve. The significant upsurge in 2020 was the result of an increase in the number of grants being distributed that year by the Foundation, notably within the Emergency Community Support Fund.

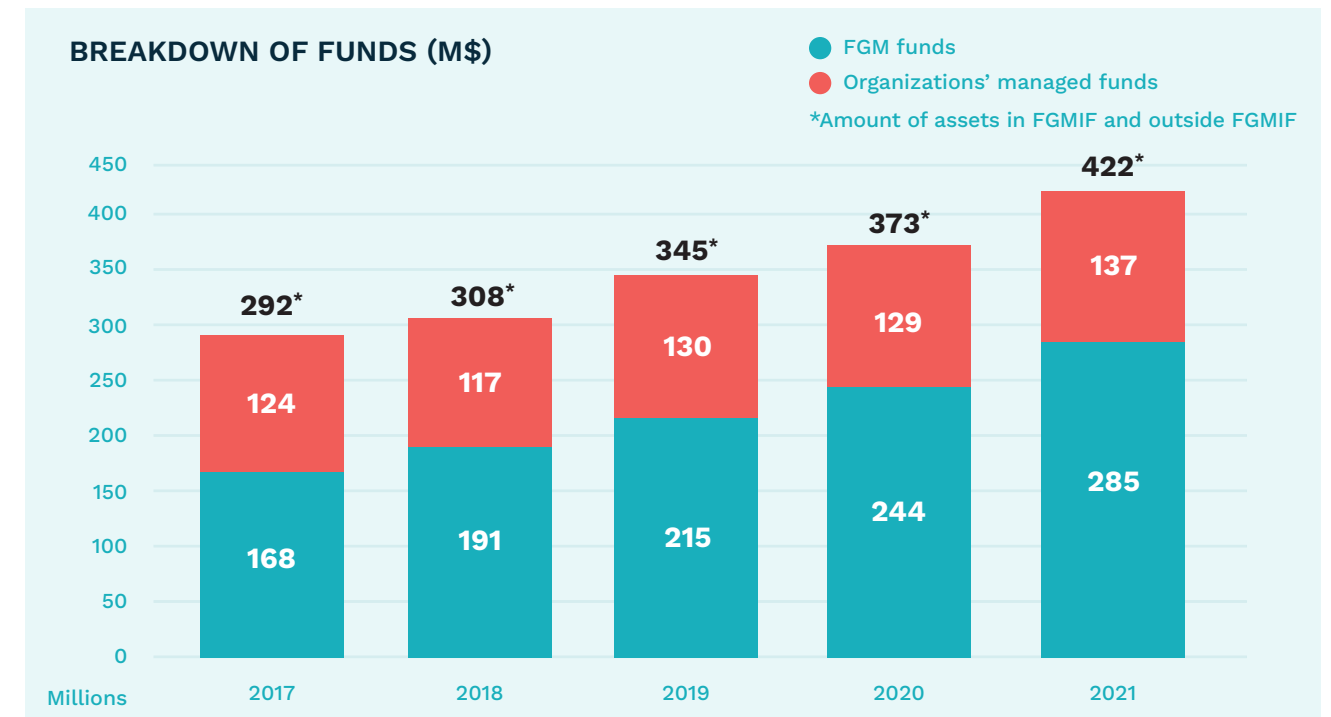
## GRANT DISTRIBUTION IN 2021, BY SDG\*



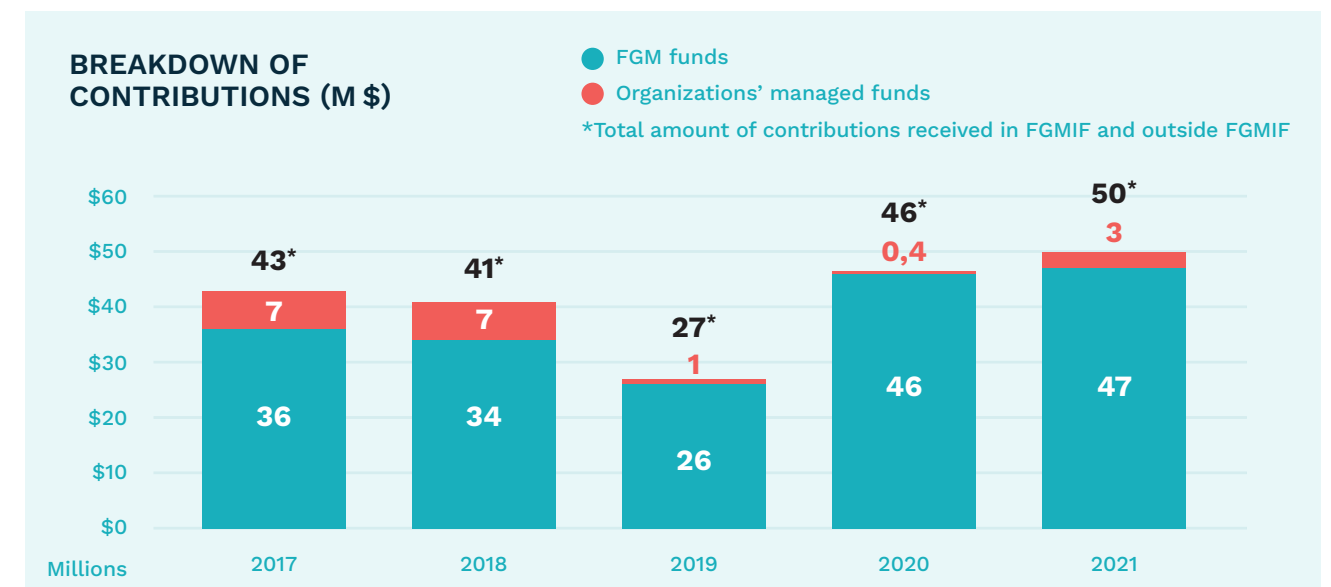
<b>SDG 1.</b> No Poverty \$363,107 – 1.5%	<b>SDG 8.</b> Decent Work and Economic Growth \$41,500 – 0.2%	<b>SDG 15.</b> Life on Land \$132,399,50 – 0.5%
<b>SDG 2.</b> Zero Hunger \$527,960,15 – 2.2%	<b>SDG 10.</b> Reduced Inequalities \$722,316 – 3%	<b>SDG 16.</b> Peace, Justice and Strong Institutions \$314,966 – 1.3%
<b>SDG 3.</b> Good Health and Well-Being \$7,243,299,99 – 29.7%	<b>SDG 11.</b> Sustainable Cities and Communities \$298,979 – 1.2%	<b>SDG 17.</b> Partnerships for the Goals \$15,000 – Less than 0.1%
<b>SDG 4.</b> Quality Education \$8,748,810,56 – 35.8%	<b>SDG 13.</b> Climate Action \$409,000 – 1.7%	<b>ARTS AND CULTURE</b> \$4,585,636,68 18.8%
<b>SDG 5.</b> Gender Equality \$80,788 – 0.3%	<b>SDG 14.</b> Life Below Water \$500 – Less than 0.1%	<b>MULTI-SDGS</b> \$935,425,57 3.8%

\* In order to reflect the multidimensional nature of certain projects, we have added a category called Multi-SDGs. As well, considering that the arts and culture sector is just as vital to the health and well-being of a community, we have kept it as a priority.

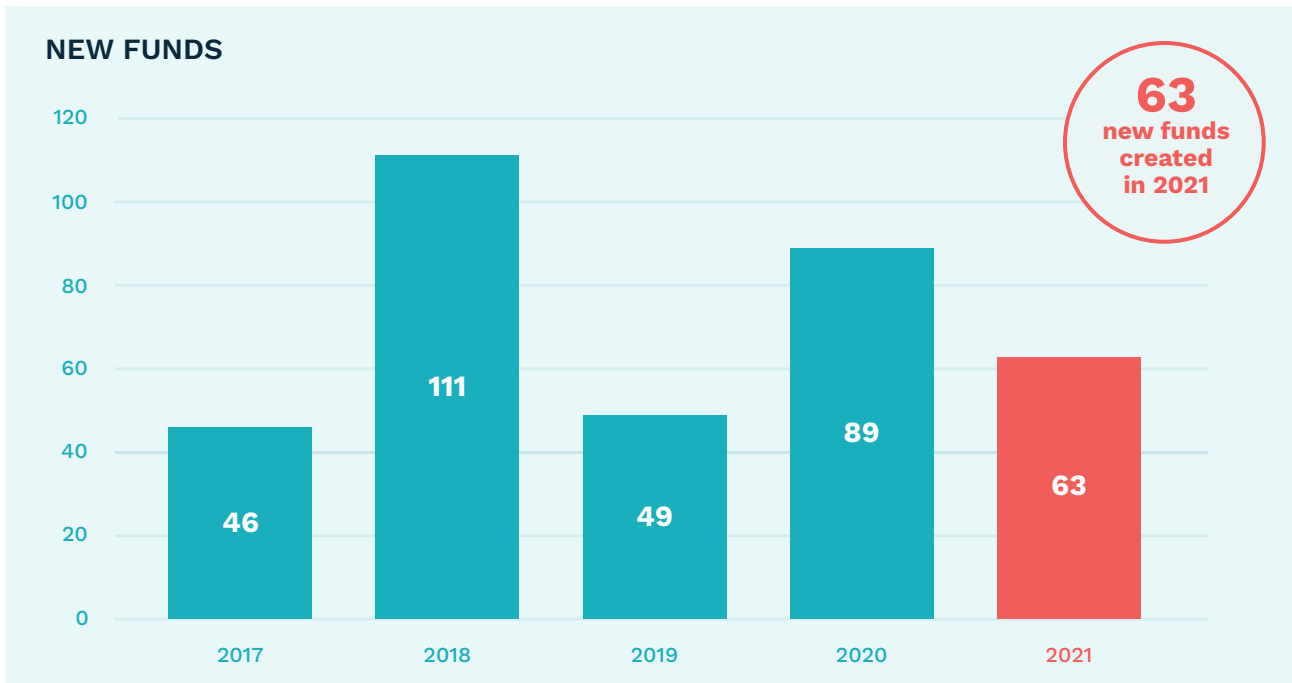
## 752 FUNDS AND NEARLY 422 MILLION DOLLARS IN ASSETS



In 2021, assets under management increased by nearly \$50 million, surpassing \$420 million. Based on the financial results for the fiscal year ending December 31, 2021, the actual amount at year end was \$421,975,123.

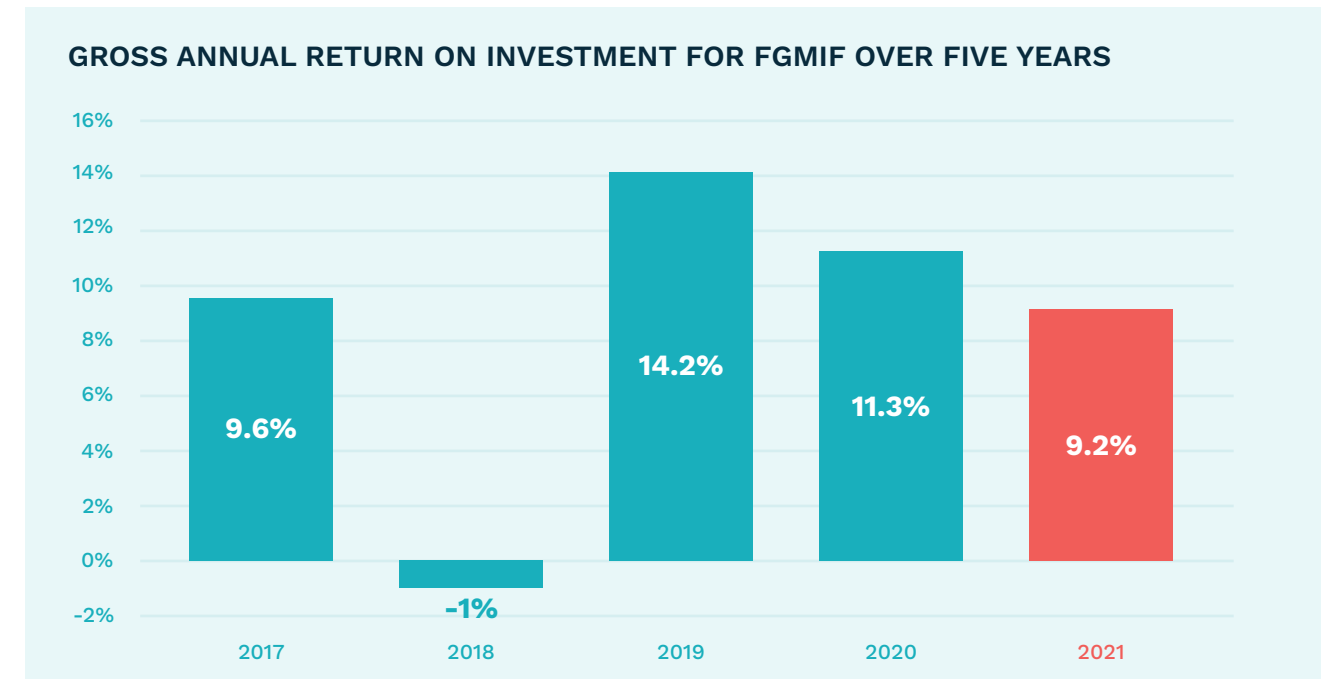


Contributions of more than \$206 million were received over the last five years.



In 2021, 63 individuals, families and organizations made the decision to create funds to support causes close to their hearts. Thanks to them, the Foundation of Greater Montréal was able to bring to 752 its number of active funds as of December 31, 2021.

## A RETURN ON INVESTMENT OF 9.2% IN 2021



After a decline to -1% in 2018, FGM's gross return on investments rebounded strongly in 2019 and saw an increase of 9.2% in 2021. The annualized gross return on investment over five years is 8.5%.

### Funds overall as of December 31, 2021

**63**

Number of new funds

**538**

FGM funds  
(valued at \$285,380,140)

**752**

Total number of funds

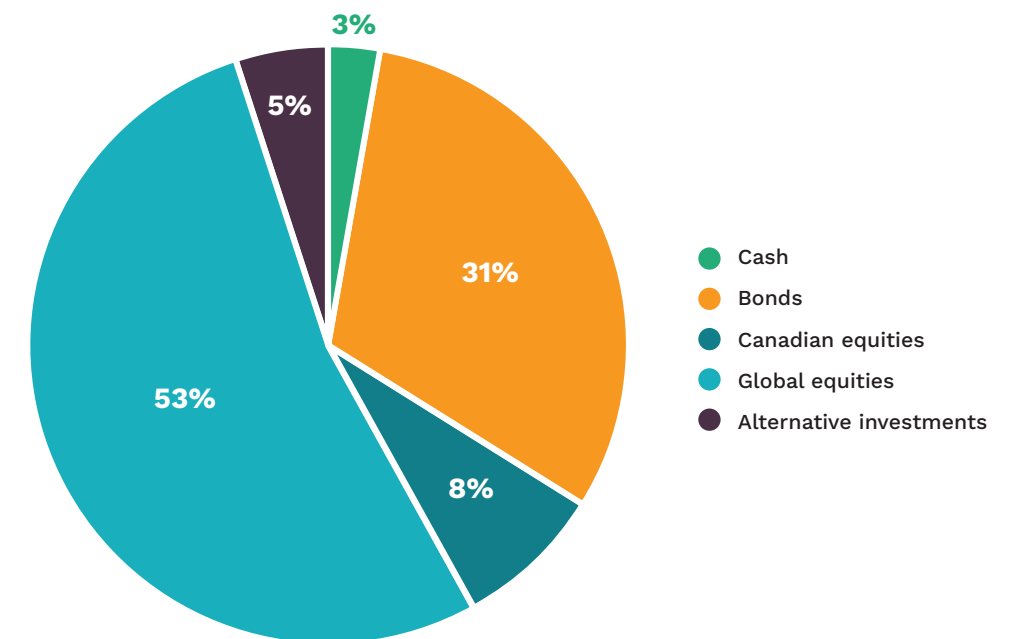
**214**

Organizations' managed funds  
(valued at \$136,594,983)

**\$422M**

Total assets  
(\$421,975,123)

### FGMIF DISTRIBUTION OF ASSETS AS OF DECEMBER 31, 2021



## FGMIF'S ADVANTAGES

The FGM Investment Fund (FGMIF) was created in 2004, with a retroactive effect to 2001. Its objective is to generate additional income through the grouping together of fund assets, and protect fund creators by forging a distinct and unique entity for the management of assets. FGMIF's orientations are based on the Foundation's investment policy, while its legal framework is governed by the Autorité des marchés financiers (AMF), Quebec's financial markets regulator. The AMF's rules govern the FGMIF's obligations as a manager, while taking into account its specificity, for example its duty to be accountable to fundholders (with regards to financial statements, the portfolio's performance, etc.). FGMIF's governance is subject as well to the rules established by, and monitoring from, FGM's Board of Directors, its Investment Committee and its management.

## DIRECT ACCESS TO FUND STATEMENTS

Thanks to Access Funds, fund creators can track the progress of their funds online by checking digital statements, a list of administrative transactions and the disbursement of grants to charitable organizations.

## PORTFOLIO MANAGERS FOR FGMIF

### MERCER PASSIVE UNIVERSE BOND FUND

- State Street Global Advisors

### MERCER OPPORTUNISTIC FIXED INCOME FUND

- BlackRock Asset Management
- Colchester Global Investors Limited
- Loomis Sayles & Company
- Western Asset Management Company

### MERCER MONEY MARKET FUND

- CIBC Asset Management

### WINDWISE S&P/TSX COMPOSITE INDEX NL FD

- State Street Global Advisors

### MERCER CANADA U.S. PASSIVE EQUITY FUND

- State Street Global Advisors

### UBS EQUITY FUND GLOBAL SUSTAINABLE

- UBS Asset Management Canada

### RBC GLOBAL EQUITY FOCUS FUND

- RBC Global Asset Management

### MERCER GLOBAL LOW VOLATILITY EQUITY FUND

- Acadian Asset Management
- Martingale Asset Management
- Ninety One
- Veritas Asset Management

### MERCER INTERNATIONAL EQUITY FUND

- Arrowstreet Capital
- LSV Asset Management
- MFS Investment Management
- American Century Investment Management
- William Blair & Company
- Lazard Asset Management

### BLACKROCK CDN MSCI EMERGING MARKETS INDEX CLASS A

- BlackRock Asset Management

### GREYSTONE REAL ESTATE

- TD Greystone Asset Management



# Summarized financial statements

The complete versions of these financial statements (including notes) are available on the FGM's website.



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## THE FOUNDATION OF GREATER MONTREAL

Year ended December 31, 2021

STATEMENT OF OPERATIONS AND CHANGES IN FUND BALANCES	2021 (\$)	2020 (\$)
<b>REVENUE</b>		
Contributions	47 740 179	45 869 605
Realized investment income	20 071 139	15 331 696
Management fees	665 957	632 387
Administration fees	570 124	537 385
Others	674 150	762 769
	<b>69 721 549</b>	63 133 842
<b>EXPENSES</b>		
Grants	24 419 050	33 336 767
Administration	3 774 622	2 968 292
Investment management and custodial fees	1 325 259	1 083 372
	<b>29 518 931</b>	37 388 431
<b>EXCESS OF REVENUE OVER EXPENSES BEFORE CHANGE IN UNREALIZED FAIR VALUE OF INVESTMENTS</b>	<b>40 202 618</b>	25 745 411
<b>CHANGE IN UNREALIZED FAIR VALUE OF INVESTMENTS</b>	<b>2 478 303</b>	3 297 857
<b>EXCESS OF REVENUE OVER EXPENSES</b>	<b>42 680 921</b>	29 043 268
Fund balance, beginning of year	246 853 847	217 810 579
<b>Fund balance, end of year</b>	<b>289 534 768</b>	246 853 847
<b>STATEMENT OF FINANCIAL POSITION</b>	<b>2021 (\$)</b>	<b>2020 (\$)</b>
<b>ASSETS</b>		
Current assets	52 833 793	31 638 623
Investments	243 903 431	218 254 934
	<b>296 737 224</b>	249 893 557
<b>LIABILITIES</b>		
Current liabilities	7 202 456	3 039 710
Investments	7 202 456	3 039 710
<b>FUND BALANCES</b>		
Externally restricted	287 268 602	244 923 882
Internally restricted	417 449	417 449
Unrestricted	1 848 717	1 512 516
	289 534 768	246 853 847
	<b>296 737 224</b>	249 893 557
<b>STATEMENT OF CASH FLOWS</b>	<b>2021 (\$)</b>	<b>2020 (\$)</b>
<b>OPERATING ACTIVITIES</b>	<b>44 232 627</b>	26 273 843
<b>INVESTING ACTIVITIES</b>	<b>(33 370 246)</b>	(27 044 389)
<b>NET INCREASE (DECREASE) IN CASH</b>	<b>10 862 381</b>	(770 546)
Cash, beginning of year	4 765 754	5 536 300
<b>Cash, end of year</b>	<b>15 628 135</b>	4 765 754



# THE FOUNDATION OF GREATER MONTREAL INVESTMENT FUND

Year ended December 31, 2021

STATEMENTS OF FINANCIAL POSITION*	2021 (\$)	2020 (\$)
<b>ASSETS</b>	<b>374 870</b>	337 333
<b>NUMBER OF REDEEMABLE UNITS OUTSTANDING, END OF YEAR</b>	<b>309 074 982</b>	281 964 499
<b>NET ASSETS PER REDEEMABLE UNIT</b>	<b>1 212 877</b>	1 196 36

STATEMENTS OF NET INCOME AND COMPREHENSIVE INCOME**	2021 (\$)	2020 (\$)
Net investment income	23 469	10 998
Realized net gains on disposal of investments	2 589	13 109
Unrealized change in fair value of investments	3 615	8 692
<b>INCREASE IN NET ASSETS ATTRIBUTABLE TO HOLDERS OF REDEEMABLE UNITS</b>	<b>29 673</b>	32 799

STATEMENTS OF NET ASSETS ATTRIBUTABLE TO HOLDERS OF REDEEMABLE UNITS**	2021 (\$)	2020 (\$)
<b>NET ASSETS ATTRIBUTABLE TO HOLDERS OF REDEEMABLE UNITS, BEGINNING OF YEAR</b>	<b>337 333</b>	306 427
Contributions	26 752	26 741
Withdrawals	(18 888)	(28 634)
Increase in net assets attributable to holders of redeemable units	29 673	32 799
<b>NET ASSETS ATTRIBUTABLE TO HOLDERS OF REDEEMABLE UNITS, END OF YEAR</b>	<b>374 870</b>	337 333

STATEMENTS OF CASH FLOWS**	2021 (\$)	2020 (\$)
<b>OPERATING ACTIVITIES</b>	<b>(10 194)</b>	(6 895)
<b>FINANCING ACTIVITIES</b>	<b>7 091</b>	(2 154)
Net decrease in cash	(3 103)	(9 049)
Cash, beginning of year	3 433	12 482
<b>Cash, end of year</b>	<b>330</b>	3 433

\* In thousands of Canadian dollars, except for number of redeemable units outstanding and amounts per redeemable unit.

\*\* In thousands of Canadian dollars.

# Team



**LISE CHARBONNEAU**  
CPA, CA

Vice-President,  
Administration,  
Finance and  
Investments



**DIANA CHELOT, CPA**

Director,  
Administration  
and Finance



**MÉLANIE CYR**

Administrative  
assistant



**MARION DAUL**

Project Manager,  
Communications



**SIMON L. DELORME**

Project Manager,  
Communications



**FABIOLA EXISTE**

Accounting  
Management Agent



**MARIE-ANDRÉE FARMER**

Director, Strategic  
Initiatives and  
Community  
Partnerships



**CATHERINE FISETTE**

Director, Public  
Affairs and  
Communications



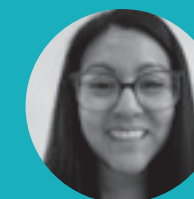
**TASHA LACKMAN, LL. B.**

Vice-President,  
Philanthropy  
and Community



**SOFIA LAROSSI**

Project Manager,  
Community



**YOLANDA MACIAS SCHAFFNER, LL. B.**

Corporate Secretary



**KAREL MAYRAND**

President  
and CEO



**LARA PAZZI**

Project Manager,  
Philanthropic  
Development



**ALEXANDRA SUCHECKI**

Project Manager,  
Philanthropic  
Development  
(Programs)



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# Appendices

## Appendix 1

List of philanthropic funds and endowment funds

## Appendix 2

List of managed funds



# Appendix 1

## LIST OF PHILANTHROPIC FUNDS AND ENDOWMENT FUNDS

To see the list of grants allocated by the various funds, go to our website at: [www.fgmtl.org/en/our-impact/grants-awarded](http://www.fgmtl.org/en/our-impact/grants-awarded)

Alan and Joan Lindsay Fund	1	Fonds Académie de musique du Québec	1
Anna and Philip Belec Foundation Fund	1	Fonds Adam-Perrin	1
Ardene Foundation Flow-Through Fund	1	Fonds Alan Blewiss	2
Ardene Foundation Fund	1	Fonds Anne-Marie et Jacques Bougie	1
Barry F. Lorenzetti - CIBPA Bursary Fund	1	Fonds Anne-Thisdale	1
Beatrice Enid Patterson Foundation Fund	1	Fonds anonyme 347235	1
Blue Metropolis Foundation Fund	1	Fonds anonyme 353988	1
<b>BMO Bank of Montréal - CIBPA Bursary Fund</b>	<b>1</b>	Fonds ARAMUSIQUE	3
Bond Foundation for Animal Welfare Fund	1	Fonds Armand et Raisa Afilalo	1
Broccolini Construction Inc. - CIBPA Bursary Fund	1	Fonds Ars Longa Vita Brevis	1
Cactus Fund	1	Fonds Artexite	1
Carlo Mastrogiuseppe - CIBPA Bursary Fund	1	Fonds Association des Clubs de Biathlon	1
Carrara Family Foundation - CIBPA Bursary Fund	1	Fonds Association Québec Snowboard	1
Catherine Rowe and John Di Gironimo Family Foundation Fund	1	Fonds Association québécoise d'aviron	1
Centaur Foundation for the Performing Arts Fund	1	Fonds Association québécoise de canoë-kayak de vitesse	1
Chamandy Foundation Fund	1	Fonds Association québécoise de sports pour paralytiques cérébraux	1
<b>Chilward Foundation Fund</b>	<b>1</b>	Fonds Association sportive des aveugles	1
<b>Christine C Lengvari Fund</b>	<b>1</b>	Fonds Association sportive des sourds du Québec	1
Corey Copeland and Betsy Martin Family Fund	1	Fonds Atelier 850	1
Corey Koorosh Fazel Foundation Fund	1	Fonds Atelier de l'Île	1
DBD Fund for Recreation and Youth	1	Fonds ATSA	1
Diana & Sam Scalia - CIBPA Bursary Fund	1	Fonds Badminton Québec	1
Distributions RVI/MTD Canada Fund	1	Fonds Bloch-Bauer	1
Dr. Marinko M. Biljan Memorial Fund	1	Fonds Bouge de là	1
Elina & Giuseppe Borsellino Family - CIBPA Bursary Fund	1	Fonds Boxe olympique du Québec	1
Elizabeth House Foundation Fund	1	Fonds BW Musique	1
<b>Ensembl'arts - Marc Djokic and Meng Meng Avery Zhao fund</b>	<b>2</b>	Fonds C.D.G. Guimond	1
Erminio Forlini Fund	1	Fonds CAMMAC	1
Estrie Animal Fund	1	<b>Fonds CCOC Allen/Carrier</b>	<b>1</b>
<b>FlatCat Fund</b>	<b>1</b>	Fonds Centaur Foundation for the Performing Arts	2
Floranna Bryant and Dorothy Mapes fund for the care of dogs	1	Fonds Centre culturel Kabir	1
Fonds Absolu Théâtre	1	<b>Fonds Centre d'action bénévole d'Iberville et de la région</b>	<b>2</b>
Fonds Académie de danse de l'Outaouais	1	<b>Fonds Centre d'archives Mgr-Antoine-Racine</b>	<b>2</b>

Funds created in 2021 appear in red. The numbers in brackets indicate the number of funds bearing that name, where there is more than one.

Fonds Centre d'histoire de Saint-Hyacinthe	1	Fonds de l'École nationale de théâtre du Canada/ Powercorp Bursary	1
Fonds Centre Marius-Barbeau	1	Fonds de l'École nationale de théâtre du Canada/ TEC	1
Fonds Centre québécois du droit de l'environnement	1	Fonds de l'École nationale de théâtre du Canada/Bell Média	1
Fonds Chants Libres	1	Fonds de l'École nationale de théâtre du Canada/Chloe Smith Bursary	1
Fonds Charlotte Gélinas	1	Fonds de l'École nationale de théâtre du Canada/EJLB Foundation Bursary Fund	1
Fonds Chœur classique de l'Outaouais	1	Fonds de l'École nationale de théâtre du Canada/Groupe financier TD bourse d'études	1
Fonds Chœur des Enfants de Montréal	1	Fonds de l'École nationale de théâtre du Canada/ScotiaBank Bursary	1
Fonds Chœur St-Laurent / St. Lawrence Choir Fund	1	Fonds de l'École nationale de théâtre du Canada/Smith Rapp	1
Fonds CIBL, la radio francophone de Montréal	1	Fonds de patinage Québec	1
<b>Fonds CIRCA art actuel en hommage à Pauline Desautels</b>	<b>2</b>	Fonds de pérennité Nouvel Horizon de Duverger	1
Fonds CIVA - Centre d'intégration à la vie active	1	Fonds Denise et Gilles Nolet	1
Fonds Claude Lemire	1	Fonds Diane Gosselin	1
Fonds Clavecin en concert	1	Fonds Diversité sexuelle-Laurent McCutcheon	1
Fonds Clavecin en concert - Luc Beauséjour à perpétuité	3	Fonds du Patrimoine religieux du Québec	1
Fonds Cogeco pour le développement social	1	Fonds Dynamo Théâtre	1
<b>Fonds Collectif Femmes Action Montréal</b>	<b>1</b>	Fonds École de cirque de Verdun	1
<b>Fonds Collectif Femmes Action Montréal (dotation)</b>	<b>1</b>	Fonds École de musique d'Abitibi-Ouest Inc.	1
Fonds Comité musique Maisonneuve Inc.	1	Fonds École nationale de l'humour (+ 1)	2
Fonds Comité régional pour la protection des falaises	1	Fonds Écomaris pour la jeunesse et les océans	1
Fonds Concerts Lachine	1	Fonds Écomusée de la maison du fier monde	3
Fonds Concours musical international de Montréal	2	Fonds Écomusée de l'Au-Delà, pour le patrimoine funéraire du Québec	1
Fonds Concours musical international de Montréal - André Bourbeau à perpétuité	1	Fonds Ensemble Caprice	3
Fonds Conseil des Arts de Montréal	1	Fonds Ensemble contemporain de Montréal	2
Fonds Corporation Augustin-Chénier	1	Fonds Ensemble vocal Ganymède	1
Fonds Corporation de Kick-boxing amateur du Québec	1	Fonds Ensemble vocal Polymnie	1
Fonds Culture pour tous	3	Fonds Espace Go Inc.	1
Fonds Curling Québec	1	Fonds Espace Libre	1
Fonds Danse Danse	1	Fonds Espace VERRE	3
Fonds Danse Sport Québec Inc.	1	Fonds Face aux vents	1
Fonds Dazibao	2	<b>Fonds Famille Ménard-Dumas</b>	<b>1</b>
Fonds de l'Orchestre symphonique de Longueuil (OSDL), section percussions - Pratt & Whitney Canada	1	Fonds Famille Rosaire Meloche pour la jeunesse	1
Fonds de la compagnie de théâtre Il va sans dire	1	Fonds Fédération de Basket-ball	1
Fonds de la Fédération Baseball Québec	1	Fonds Fédération de Cheerleading du Québec	1
Fonds de la Fédération de tir à l'arc du Québec	1	Fonds Fédération de crosse du Québec	1
Fonds de la Fédération Équestre du Québec	1	Fonds Fédération de gymnastique du Québec	1
Fonds de la Fédération québécoise d'Athlétisme	1	Fonds Fédération de lutte olympique du Québec	1
Fonds de la Fondation Lise et Richard Fortin pour les cuivres de l'OSDL	1	Fonds Fédération de nage synchronisée du Québec	1
Fonds de la Fondation Three Pines	1	Fonds Fédération de natation du Québec	1
Fonds de La Fondation Toujours Ensemble	1	Fonds Fédération de Netball Amateur du Québec	1
Fonds de la Société de Sauvetage	1	Fonds Fédération de patinage de vitesse du Québec	1
Fonds de l'École nationale de théâtre du Canada	1	Fonds Fédération de pétanque du Québec	1
Fonds de l'École nationale de théâtre du Canada/ Bibliothèque	1	Fonds Fédération de ski alpin du Québec	1
Fonds de l'École nationale de théâtre du Canada/ David & Carol Appel Bursary	1	Fonds Fédération de ski nautique et planche	1

# LIST OF PHILANTHROPIC FUNDS AND ENDOWMENT FUNDS

Fonds Fédération de Soccer du Québec	1	Fonds Fondation Famille Jean Brassard	1
Fonds Fédération de tennis de table du Québec	1	Fonds Fondation Famille Kenny Tang	1
Fonds Fédération de tir du Québec	1	Fonds Fondation Famille Lupien	1
Fonds Fédération de voile du Québec	1	Fonds Fondation Famille Moreault	1
Fonds Fédération de water-polo du Québec	1	Fonds Fondation Famille Morency	1
Fonds Fédération des sports à quatre murs	1	Fonds Fondation Foisy Bernier	1
Fonds Fédération Escrime du Québec	1	Fonds Fondation Francine Veilleux	1
Fonds Fédération québécoise de ballon sur glace	1	Fonds Fondation Gatien Paquette	1
Fonds Fédération québécoise de canoë-kayak d'eau vive	1	Fonds Fondation Gilles Richard pour la faune	1
Fonds Fédération Québécoise de Dynamophilie	1	Fonds Fondation Grantham pour l'art et l'environnement (+ 1)	2
Fonds Fédération québécoise de handball olympique	1	Fonds Fondation Groupe Di Tomasso	1
Fonds Fédération québécoise de la montagne et de l'escalade	1	Fonds Fondation Jean E. et Lucille Douville	1
Fonds Fédération québécoise de ski acrobatique	1	Fonds Fondation June Hébert	1
Fonds Fédération québécoise de Taekwondo	1	Fonds Fondation Léo Bureau-Blouin	1
Fonds Fédération québécoise des sports cyclistes	1	Fonds Fondation LISI GEOFFROY	1
Fonds Fédération québécoise d'Ultimate Frisbee	1	Fonds Fondation Lorraine Pintal	1
Fonds Fédération québécoise de Kin-Ball	1	Fonds Fondation Louis Pierre	1
Fonds Festival classica et Gestion classica	2	Fonds Fondation Lucie et André Chagnon	1
Fonds Festival de Musique de Chambre de Montréal	1	<b>Fonds Fondation Lucien Ouellet</b>	<b>1</b>
Fonds Festival de Musique de Chambre de Montréal – Artistes émergents à perpétuité	1	Fonds Fondation Maison Théâtre	1
Fonds Festival des Arts de Saint-Sauveur	4	Fonds Fondation Mariette et Gilles Vendette	1
Fonds Festival international de jardins	3	Fonds Fondation Mères avec Pouvoir	1
Fonds Festival international de Lanaudière – Artistes émergents à perpétuité	2	Fonds Fondation Monselin	1
Fonds Fondation Académie du Trésor	1	<b>Fonds Fondation Opus 3</b>	<b>1</b>
Fonds Fondation Azimut	1	Fonds Fondation Orchestre symphonique de Longueuil	1
Fonds Fondation Christian Grenier	1	Fonds Fondation Patrick Foley	1
Fonds Fondation de Claire et Jean-Pierre Léger	1	Fonds Fondation Paul et Hélène Desmarais (+ 1)	2
Fonds Fondation de l'Ensemble Arion (+ 2)	4	Fonds Fondation Paul-A. Fournier	1
Fonds Fondation Denise Grenier	1	Fonds Fondation Pierre Brunet	1
Fonds Fondation des étoiles	1	Fonds Fondation Pierre Chamberland	1
Fonds Fondation des ingénieurs municipaux du Québec	1	Fonds Fondation Pierre Chouinard	1
Fonds Fondation Docteur Sadok Besrouer	1	Fonds Fondation Plouffe Renaud	1
Fonds Fondation du Collège Stanislas	1	Fonds Fondation RG	1
Fonds Fondation du Musée des maîtres et artisans du Québec	1	Fonds Fondation santé et mieux-être Jeanne-Mance	1
Fonds Fondation du Théâtre du Marais de Val-Morin	2	Fonds Fondation Serge Lecompte	1
Fonds Fondation du Théâtre du Nouveau Monde	2	Fonds Fondation Stéfane Fomy	1
<b>Fonds Fondation Espace pour la vie</b>	<b>1</b>	Fonds Fondation Stéphane Bourque	1
Fonds Fondation Famijeunes	1	<b>Fonds Fondation Tristan-Roy</b>	<b>1</b>
Fonds Fondation Famille Colette Marcil	1	Fonds Football Québec	1
Fonds Fondation Famille Douesnard	1	Fonds Francine Robert	1
		Fonds Fusion Jeunesse	1

Funds created in 2021 appear in red. The numbers in brackets indicate the number of funds bearing that name, where there is more than one.

<b>Fonds Galerie B-312</b>	<b>2</b>	Fonds Les Amis des Jardins de Métis 2	2
Fonds Germain Benoit	1	Fonds Les Amis des jardins de Métis Inc.	1
Fonds Germaine Gibara	1	Fonds Les Éditions du Remue-Ménage	1
Fonds Gilles Charette	1	<b>Fonds Les Éditions Esse</b>	<b>1</b>
Fonds Golf Québec	1	Fonds Les Filles électriques	1
Fonds GRIS-Montréal	1	Fonds Les Grands Ballets Canadiens de Montréal - Constance Pathy à perpétuité	2
Fonds Hélène Charbonneau	1	<b>Fonds Les Idées Heureuses à perpétuité</b>	<b>2</b>
<b>Fonds Héritage Afro-Canada 2024</b>	<b>2</b>	Fonds Les Petits Violons	3
Fonds Héritage Parkinson	1	Fonds Les Scientifines	1
Fonds Hockey Québec	1	Fonds Les Trois Sentiers	1
Fonds hommage de la Fondation des victimes du 6 décembre contre la violence	1	Fonds L'Orchestre de chambre I Musici de Montréal - David Sela à perpétuité	1
Fonds ICI par les arts	1	Fonds Lutte contre la pauvreté de la région de Saint-Hyacinthe	1
Fonds INIS	1	Fonds Maison de l'architecture du Québec	1
Fonds Isidore et Anna Blanchard	1	Fonds Maison des jeunes l'Escampette	1
Fonds Jacques Parizeau	1	Fonds Maison Théâtre	1
Fonds Jean-Pierre Guilbault	1	Fonds Malo	1
Fonds Jérôme Gendron	1	Fonds Margaret K. Deacon	1
Fonds Jeunesses Musicales Canada - Joseph Rouleau et André Bourbeau à perpétuité	3	Fonds Marie-Thérèse Dugré	1
Fonds Josée Coallier	1	<b>Fonds Mécénat La SAMS - Musique, Santé, Bien-être</b>	<b>2</b>
Fonds Josée et Michel Jacques	1	Fonds Memphrémagog Conservation inc.	1
Fonds Judo Québec	1	Fonds Métiers et Traditions	1
Fonds Jules Florent	1	Fonds Michael Novak	2
Fonds Julie Thorn	1	Fonds Micheline et Pierre L. Comtois	1
Fonds Karaté Québec	1	<b>Fonds Michelle-Rossignol du Centre du Théâtre d'Aujourd'hui</b>	<b>2</b>
Fonds Karuna Canada	1	Fonds Moisson Montréal	2
Fonds Kateri / Jeunesse Canada Monde	1	Fonds Moisson Rive-Sud	1
Fonds La bougeotte Mario Totaro	1	Fonds Moisson-Estrie	1
Fonds La Compagnie Marie Chouinard	1	Fonds Monique et Guy Bisailon	1
Fonds La Fondation lavalloise des lettres	1	Fonds Montréal Baroque - Suzie Napper à perpétuité	3
Fonds La Scène Musicale	1	Fonds Montrusco Bolton pour l'éducation	1
<b>Fonds La Vie des Arts</b>	<b>2</b>	Fonds Musée d'Aylmer	1
Fonds L'Académie de musique du Québec - Prix d'Europe	1	Fonds Musée de l'Holocauste Montréal	1
Fonds L'Arrière Scène	1	Fonds Musée Ferroviaire Canadien	2
Fonds Le Chœur des Disciples de Massenet	1	Fonds Musée Pierre-Boucher	1
Fonds Le Domaine Forget - À perpétuité	2	Fonds Objectifs de développement durable	1
Fonds Le Mois de la Photo à Montréal	1	Fonds Oboro	2
Fonds Le Moulin à musique	1	Fonds Oktoécho	1
Fonds Le Musée McCord Stewart - Mécénat à perpétuité	2	Fonds Olympiques spéciaux du Québec	1
Fonds Le Projet Harmonie	1	<b>Fonds OPCM (Orchestre Philharmonique et Chœur des Mélomanes)</b>	<b>2</b>
Fonds Le Théâtre de la Banquette arrière	1	Fonds Optica	1
Fonds Le Théâtre de la Manufacture	1	Fonds Orchestre Classique de Montréal - Boris Brott à perpétuité	2
Fonds L'Ensemble instrumental Appassionata	1	Fonds Orchestre de l'Agora	2
Fonds L'Ensemble Les Boréades de Montréal	1		
Fonds Les Amis des Jardins de Métis - Conservation Nature	1		

# LIST OF PHILANTHROPIC FUNDS AND ENDOWMENT FUNDS

Fonds Orchestre métropolitain - Artistes Émergents à perpétuité	3
Fonds Orchestre Philharmonique du Nouveau Monde	1
Fonds Orchestre symphonique de Drummondville (+ 2)	5
Fonds Orchestre symphonique de Gatineau	1
Fonds Orchestre symphonique de Laval	2
Fonds Orchestre symphonique de Longueuil	2
Fonds Orchestre symphonique des jeunes de Montréal (+ 1)	2
Fonds Oulanne	1
Fonds Outils de Paix pour l'innovation en prévention de la violence	1
Fonds Oxfam	1
Fonds Parasports Québec	1
Fonds Paul-André Fortier et Denis Lavoie	1
Fonds Pentaèdre, quintette à vent	1
Fonds Perspectives Jeunesse	1
Fonds PharmaSanté-Samaan	1
Fonds Pierre Brunet	1
Fonds Pierre Brunet II	1
Fonds Plongeon Québec	1
Fonds Pont-St-Jean	1
Fonds pour la prévention du cancer et des maladies du cœur	1
Fonds pour les musiciens de l'OSDL, nos athlètes	1
Fonds Praxis Art Actuel	1
Fonds Prix Hubert Reeves pour le meilleur livre de vulgarisation scientifique	1
Fonds Productions Traquen'Art inc.	1
Fonds QMD pour la jeunesse	1
Fonds Quatuor Bozzini 3	1
Fonds REGAIN santé	1
Fonds Relance jeunes et familles	1
Fonds René Pomerleau - ACFAS	1
Fonds REVDEC	1
Fonds Richard Ouellet in Memoriam	1
Fonds Ringuette-Québec	1
Fonds Rugby Québec	1
<b>Fonds Satellite</b>	<b>1</b>
Fonds SBC galerie d'art contemporain	1
Fonds S'en sortir	1
Fonds Serge et Renée T. Chapados	1
Fonds Service d'aide communautaire Anjou	1
Fonds Services des soins palliatifs de l'Ouest-de-l'Île	1
<b>Fonds Simone Benoît-Roy</b>	<b>2</b>

Fonds Ski de fond Québec	1
Fonds SMCQ	2
Fonds SMCQ - Gilles Tremblay	1
Fonds SMCQ Jeunesse	2
Fonds Société d'histoire et de généalogie du Plateau Mont-Royal	1
Fonds Société Pro Musica Inc. - À perpétuité	1
Fonds Société Saint-Vincent de Paul	1
Fonds Softball Québec	1
Fonds Sophie Labrecque et Jean Gattuso	1
Fonds Studio de musique ancienne de Montréal	4
Fonds Studio de musique ancienne de Montréal (SMAM) - Christopher Jackson à perpétuité	1
Fonds Suzanne Boivin-Fecteau	1
Fonds Suzanne Trépanier-Côté	1
Fonds Tangente	1
Fonds Tennis Québec	1
Fonds Théâtre Aux Écuries	1
Fonds Théâtre Bluff	1
<b>Fonds Théâtre Bouches Décousues</b>	<b>2</b>
Fonds Théâtre de la Ville	1
Fonds Théâtre de musique ancienne	1
Fonds Théâtre de musique ancienne (TEM) - Daniel Taylor à perpétuité	1
Fonds Théâtre du double signe	1
Fonds Théâtre du Rideau Vert	2
Fonds Théâtre Petit à Petit	1
Fonds Tiphane	1
Fonds Triathlon Québec	1
Fonds Trouble du déficit de l'attention (TDA/H) - Fondation Josée Croteau	1
<b>Fonds Un et un font mille</b>	<b>1</b>
Fonds Vallum Advancement	2
Fonds Vincent-Charette	1
Fonds Vital d'aide aux réfugiés	1
Fonds Volleyball Québec	1
Fonds Vox Aeterna - Kerry-Anne Kutz à perpétuité	3
Fonds VOX, centre de l'image contemporaine	1
Fonds Vues d'Afrique	1
<b>Fonds Yohan Morneau</b>	<b>1</b>
Fonds Yvon Roy	1
Gallop Family Fund	1
Giovanni (John) Marcovecchio Family - CIBPA Bursary Fund	1

Funds created in 2021 appear in red. The numbers in brackets indicate the number of funds bearing that name, where there is more than one.

Giuseppe and Antonietta Paventi - CIBPA Bursary Fund	1
Giuseppe Di Battista - CIBPA Bursary Fund	1
Gozzo Family Fund	1
GSC Community Impact Fund	1
GSC Community Impact Fund (Flow-through)	1
Guerrera and Tedeschi Family - CIBPA Bursary Fund	1
Harrison Family Fund	1
J.S. and Associates Fund	1
J.W. McConnell Family Foundation Fund	1
Joan and Alex Paterson Fund	1
Jonathan and Susan Wener Fund	1
<b>Julia Cianci - CIBPA Bursary Fund</b>	<b>1</b>
Junior League of Montreal Legacy Fund	1
Katharine Pearson Memorial Fund	1
Ke Chin Jimmy Ho Memorial Fund	1
Ladies' Morning Musical Club - Constance Pathy in Perpetuity Fund	3
Laya & Harry Feldman Family Fund	1
LES Foundation Fund	1
Lucie Petrelli and Paul Lutfy Family Fund	1
Malouf Family Fund	1
Marcel Naud Family Foundation Fund	1
<b>Mary Rivard &amp; Claude David Education Fund</b>	<b>1</b>
Marymount Alumni Fund for children & youth	1
Maxwell F. Yalden Bursary Fund	1
May Kersten Social Justice Fund	1
<b>Micass Foundation Fund</b>	<b>1</b>
Michael and Michaelleen O'Connor's Fund	1
Michael Prytula Family Fund	1
Morgan's Hope Memorial Fund	1
Niro Family - CIBPA Bursary Fund	1
Patrick H. Irwin Fund	2
Persephone Productions Fund	1
Pound Family Foundation Fund	1
Priory School Foundation Touch Tomorrow Fund	1
<b>Quebec Writer's Federation Fund</b>	<b>1</b>
Queen Elizabeth Hospital Foundation Health Fund	1
Rainbow/Arc-en-ciel Fund	1
Red Birds Ski Club Fund	1
Red Feather Fund	1
Refuge Juan Moreno Fund	1
Rotary Club of Montreal Fund	1
<b>Sabino Grassi - CIBPA Bursary Fund</b>	<b>1</b>
Sam & Lynda Gatelaro Fund	1
Samcon Fund	1
Sedbergh School Fund	1

Segal Centre for Performing Arts Fund	2
St. John Ambulance Fund	1
St. Lawrence Choir Fund	1
<b>St. Michael's Finnish Montreal Community Fund (SMF)</b>	<b>1</b>
<b>Talisman Theatre Fund</b>	<b>2</b>
<b>The Chodos Family Foundation Fund</b>	<b>1</b>
The Miller Thomson Foundation Fund	1
The Salvatore Nicastro Family - CIBPA Bursary Fund	1
Tom and Olga Maxwell Fund	1
Vallum Advancement Fund	1
William Garnet Matthew Strong Inter-Faculty Arts & Science Bursaries Fund	1
<b>TOTAL</b>	<b>538</b>

# Appendix 2

## LIST OF MANAGED FUNDS

Centaur Foundation for the Performing Arts Fund	1	Fonds École de cirque de Verdun	1
<b>Dr. Fatma Amer Educational Charity Fund</b>	<b>1</b>	Fonds École de musique Harricana Inc.	1
Fonds Absolu Théâtre	1	Fonds École nationale de l'humour	1
Fonds Académie de musique du Québec	1	Fonds Écomusée de la maison du fier monde	1
Fonds Agora de la danse	2	Fonds Ensemble Anonymus	2
Fonds Amis et propriétaires de maisons anciennes du Québec	2	Fonds Ensemble contemporain de Montréal	1
Fonds Aramusique	2	Fonds Ensemble Musica Orbium	1
Fonds Association des galeries d'art contemporain	1	Fonds Ensemble vocal Arts-Québec	1
Fonds Atelier de l'île	1	Fonds Ensemble vocal Polymnie	1
Fonds Atelier du conte en musique et en images Inc.	1	Fonds Espace VERRE	1
Fonds Atelier Graff	2	<b>Fonds Famille Frizon Pereša</b>	<b>1</b>
Fonds Autour de la flûte	1	Fonds FGM - Activités	1
Fonds BW Musique	1	Fonds Fondation Centraide - Jean Gaulin	1
Fonds Camp YMCA Kanawana	1	Fonds Fondation Centraide du Grand Montréal	1
Fonds Centre canadien d'architecture	1	Fonds Fondation Chorale Québec	2
Fonds Centre culturel Kabir	2	Fonds Fondation Concours musical international de Montréal	2
Fonds Centre d'art et de diffusion Clark	1	Fonds Fondation de soutien aux arts de Laval	1
Fonds Centre des arts actuels Skol	2	Fonds Fondation du Centre des auteurs dramatiques	2
Fonds Centre d'Exposition de Val-d'Or	1	Fonds Fondation du musée d'archéologie et d'histoire de Montréal Pointe-à-Callière	2
Fonds Centre musical En sol mineur Inc.	1	Fonds Fondation du Musée d'art contemporain de Montréal	2
Fonds Choeur classique de Montréal	2	Fonds Fondation du Théâtre du Marais de Val-Morin	2
Fonds Chorale Donovan Inc. (Chœur Anima Musica)	2	Fonds Fondation du Théâtre du Nouveau Monde	1
Fonds Circuit-Est	1	Fonds Fondation Festival international de Lanaudière Inc.	2
Fonds Compagnie musicale La Nef	2	Fonds Fondation Maison Théâtre	1
Fonds Concerts noncerto	1	Fonds Fondation Ushket-André Michel	1
Fonds Concours musical international de Montréal	2	Fonds Galerie B-312	2
Fonds Dare-Dare, Centre de diffusion d'art multidisciplinaire de Montréal Inc.	2	Fonds Illustration Québec	1
Fonds Dazibao	2	Fonds Impératif Français	2
Fonds de la compagnie de théâtre Il va sans dire	1	Fonds INIS	1
Fonds des employés de la Fondation québécoise du cancer	1	Fonds Institut canadien d'art vocal (ICAV)	1
Fonds Diagonale	2	Fonds Jeunesses musicales du Canada	2
Fonds Diffusions Amal'Gamme	1	Fonds La Fondation de la Maison Trestler	2
Fonds Docteur Michel Gélinas	1	Fonds La Fondation de l'École nationale de cirque	2
Fonds Docteur Pierre Audet-Lapointe	1	Fonds La Fondation de l'Ensemble Arion	2
Fonds du Patrimoine religieux du Québec	1	Fonds La Fondation du YMCA du Grand Montréal	1
Fonds Dulcinée Langfelder et Cie	1	Fonds La Fondation Gérard-Delage	1
Fonds Dynamo Théâtre Inc.	2	Fonds La Fondation Jean Duceppe	1

Funds created in 2021 appear in red. The numbers in brackets indicate the number of funds bearing that name, where there is more than one.

Fonds La Fondation lavalloise des lettres	1	Fonds Philharmonie Jeunesse de Montréal	1
Fonds La Vie des arts	1	Fonds Philharmonie Jeunesse de Montréal 2	1
Fonds L'Association des Auteurs et Auteures de l'Outaouais	2	Fonds Pierre-Rolland	1
Fonds Le Chœur classique de l'Outaouais	1	Fonds pour le patrimoine funéraire du Québec	1
Fonds Le Chœur polyphonique de Montréal	1	Fonds PPS Danse Inc.	2
Fonds Le Groupe Molior Inc.	1	Fonds Productions SuperMémé Inc.	1
Fonds Le Moulin à musique	1	Fonds Productions Totem Contemporain	2
Fonds Le Musée McCord d'histoire canadienne	1	Fonds Productions Traquen'Art inc.	1
Fonds Le Musée régional Vaudreuil-Soulanges	1	Fonds Projections libérantes	2
Fonds Le Petit Théâtre de Sherbrooke Inc.	2	Fonds Quasar Quatuor de saxophones	2
Fonds Le Petit Théâtre du Vieux Noranda	1	Fonds Quatuor Bozzini	2
Fonds Le Projet Porte-Parole	1	Fonds Quatuor Bozzini 2	1
Fonds Le Théâtre de la Banquette arrière	1	Fonds Quatuor Molinari	2
Fonds L'Ensemble Les Boréades de Montréal	1	Fonds René Pomerleau - ACFAS	1
Fonds Les Éditions esse	1	<b>Fonds Rosaire-Tremblay Inc.</b>	<b>1</b>
Fonds Les Filles électriques	1	Fonds Sam Lazarus	1
Fonds Les Productions Hôtel-Motel	2	Fonds Sandra Chartrand	1
Fonds L'OFF Festival de Jazz de Montréal	1	Fonds SBC galerie d'art contemporain	1
Fonds L'Opéra de Montréal	1	Fonds Sibyllines Inc.	2
Fonds L'Orchestre symphonique de Montréal	1	Fonds Sinha Danse	2
Fonds Luciano Borsato	1	Fonds Société arts et culture de Saint-Placide	2
Fonds Maison de l'architecture du Québec	1	Fonds Société de développement culturel de Terrebonne	2
Fonds Maison Merry	2	Fonds Société des mélomanes de l'Abitibi-Témiscamingue Inc.	1
Fonds Maison Saint-Gabriel	2	Fonds Société d'histoire et de généalogie du Plateau Mont-Royal	1
<b>Fonds Michelle-Rossignol du Centre du Théâtre d'Aujourd'hui</b>	<b>1</b>	Fonds Société Ensemble Masques	1
Fonds Musée d'art contemporain des Laurentides	2	Fonds Société littéraire de Laval	1
Fonds Musée de l'Holocauste Montréal	1	Fonds Société Pro Musica Inc.	1
Fonds Musée de société des Deux-Rives	2	Fonds Standard Life	1
Fonds Musée des beaux-arts de Montréal	2	Fonds Stuko-Théâtre	1
Fonds Musée des beaux-arts de Mont-Saint-Hilaire	2	Fonds Stuko-Théâtre Inc.	1
Fonds Musée des beaux-arts de Sherbrooke	1	Fonds Théâtre Bistouri	1
Fonds Musée du Château Ramezay	1	Fonds Théâtre Bluff	1
Fonds Musée du Haut-Richelieu	2	Fonds Théâtre de la Pire Espèce	2
Fonds Musée Pierre-Boucher	1	Fonds Théâtre du double signe	1
Fonds Oboro	1	Fonds Théâtre du Tandem	2
Fonds Occurrence	1	Fonds Vues d'Afrique	1
Fonds Omnibus, le corps du théâtre	2	Priory School Foundation Touch Tomorrow Fund	1
Fonds Opéra/Théâtre Voxpopuli	2	Red Feather Foundation Fund	1
Fonds Optica	1	St. Lawrence Choir Fund	1
Fonds Orchestre des jeunes de Westmount	1	Stanstead Historical Society Fund	1
Fonds Orchestre métropolitain du Grand Montréal	1	The Visual Arts Centre Fund	1
Fonds Orchestre symphonique de Gatineau	1	Thomas More Institute Fund	1
Fonds Orchestre symphonique des jeunes de Montréal	2		
Fonds Parasports Québec	1		
Fonds Pentaèdre, quintette à vent	1		
		<b>TOTAL</b>	<b>214</b>

## The Foundation of Greater Montréal, a community foundation

Community foundations are charitable organizations that devote themselves to improving living conditions in communities in specified geographic areas by attracting and investing charitable gifts from donors to create endowment funds, then redistributing the income produced by these investments in the form of grants to community organizations. Community foundations also play a key social role: they monitor the quality of life in their area, and they match people with resources and ideas so as to build stronger and more resilient communities.

### HONORARY FGM MEMBERS

We thank these builders, who marked the creation and development of the Foundation of Greater Montréal through their unrelenting efforts, their commitment and their dedication:

**PIERRE L. COMTOIS**

**JEAN-FRANÇOIS DE GRANDPRÉ**

**GILLES ÉMOND**

**W. JOHN GALLOP**

**YVAN GAUTHIER**

**SHEILA GOLDBLOOM**

**MICHEL LAMONTAGNE**

**IRENE NATTEL**

**ALEX K. PATERSON**

**CLAIRE RICHER-LEDUC**

**MANON VENNAT**

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