

2014 ANNUAL REPORT



COMMUNITY
FOUNDATION
south okanagan | similkameen

**YOUR
COMMUNITY
MAKES YOU**

**AND YOU
MAKE YOUR
COMMUNITY**

**THROUGH
YOUR COMMUNITY
FOUNDATION**

**BRINGING PEOPLE
AND CAUSES
TOGETHER**

**TO CREATE
SMART & CARING
COMMUNITIES**



From the President & Executive Director



Susan Kelly, President



Aaron McRann, Executive Director

The Community Foundation of the South Okanagan Similkameen (CFSOS) has been dedicated to fulfilling donor wishes and building smarter & more caring communities since its inception in 1991.

The strategic vision of the Foundation is to continually increase our impact, to be more innovative, and to be philanthropic leaders in the communities we serve.

The founding directors of the Foundation would surely be pleased with the development of their vision. While we began as endowment builders, donors and funders for local charities, we have evolved to meet the increasingly complex needs of our communities.

Our first year of granting, in 1993, amounted to just over \$2000 in grants. Today we are now approaching the \$2 million mark in total grants to community organizations! All this, while preserving (and growing) the originally donated capital.

In addition to granting, we're very proud to partner with the community in several other ways, including 100 Women Who Care, Random Act of Kindness Day, Vital Signs, Smart & Caring Communities, the YES Project, and the new Community Knowledge Centre.

Together we're making our community a healthier and happier place to live, work and play.

Yours truly,

Susan Kelly
President of the Board

Aaron McRann
Executive Director

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COMMUNITY
FOUNDATIONS
OF CANADA
all for community.



COMMUNITY
FOUNDATIONS
OF CANADA

We are proud to be part of a national network of 191 community foundations, working independently, but as part of a national team, to build stronger, more vibrant communities.

Who is the Community Foundation?

The Community Foundation of the South Okanagan Similkameen offers local citizens a way to give back to their community either for a specific cause of interest, or to support current community needs as identified by the Foundation.

The Community Foundation is not a charity that supports its own programs, nor do we compete with other agencies for funds. Rather, we pool the charitable gifts of many donors to cultivate and grow permanently endowed legacy funds that provide lasting support for local communities and charitable organizations based on local priorities.

Income earned by the permanent funds is distributed to support a broad range of community agencies, while the original investment is left to grow over time.

Founded in 1991 as the Penticton & District Foundation, with funding from the Penticton Rotary Club, the City of Penticton, HSBC, and the Vancouver Foundation, the Community Foundation of the South Okanagan Similkameen

serves every citizen within the boundaries of the RDOS.

The Community Foundation is dedicated to helping donors give back to the community they hold dear because:

YOUR COMMUNITY MAKES YOU AND YOU MAKE YOUR COMMUNITY.

The three principle roles of a community foundation are to:

Cultivate and grow permanently endowed legacy funds which are invested wisely for the long term benefit of the community.

Share the legacies by making effective grants from the investment earnings to seed, nurture and support a broad range of community initiatives.

Provide leadership in our communities by encouraging collaboration among charitable agencies, facilitating learning and convening opportunities for all.

2014 Board of Directors

Susan Kelly, President
Kim Lyster, Vice President
Marielle Brule, Treasurer
Patrick Bell
David Braumberger
Craig Dunbar
Tom Kampman
Graham Lyle
Andre Martin (*resigned Nov 2014*)
Doug McPherson
Milton Orris (*resigned April 2015*)

Foundation Staff

Aaron McRann
Executive Director

Sarah Trudeau
Regional Development
Coordinator

Kelly Helfrich
Administration

2013-2016 Strategic Goals

#1

Increase Impact

The Foundation will seek to increase its impact in the community by offering donors and supporters a variety of giving tools to facilitate more charitable giving. The Foundation is also committed to continually monitoring the impact of its granting in order to improve grant making strategies for the future.

#2

Be Innovative

The Foundation cultivates an attitude of openness in all areas of board and staff operations to ensure that we are continually seeking new and innovative strategies. We will explore innovative ways to act as a convener, to offer in-kind services to the non-profit sector, to leverage the expertise of our alumni, and to maintain a healthy organization.

#3

Philanthropic Leadership

The Foundation seeks to be known as a centre of excellence for community philanthropy. We will work hard to demonstrate leadership by promoting a menu of offerings to donors, by hosting conversations and free educational forums on charitable giving to build a culture of philanthropy in our communities.

#1 IMPACT

\$223,000

granted to charities throughout the RDOS in 2014.

85

charities received grants in 2014

108

endowment funds

9

types of funds to support unique giving goals

1%

administration fee charged on funds

\$10 million

Managing more than \$10 million in assets

3 Strategic Goals

Coming October 2015

SOUTH OKANAGAN'S

3rd Edition

VitalSigns®



COMMUNITY KNOWLEDGE CENTRE

Community Foundation of the South Okanagan | Similkameen

100 | WOMEN

Who Care



Types of gifts:

- cash
- bequests
- real estate
- publicly listed securities
- life insurance policies



SMART & CARING COMMUNITIES



COMMUNITY FOUNDATIONS OF CANADA

Income Tax & Estate Planning Workshops for citizens

Grant Writing Workshops for Charities

YES

Youth Engagement Strategy

Building relationships with Penticton Youth

JUST IN CASE Planning Guides

Random Act Of KXndness Day®

#3 LEADERSHIP

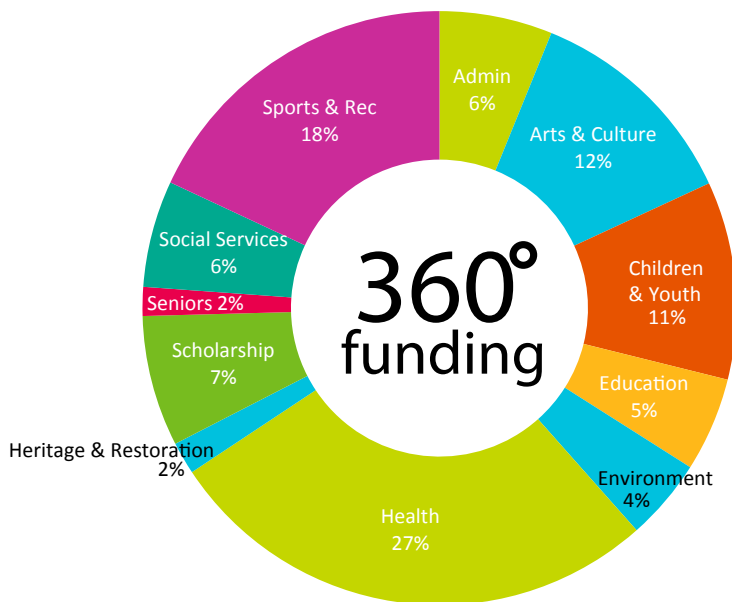
#2 INNOVATION

2014 Grants to the Community

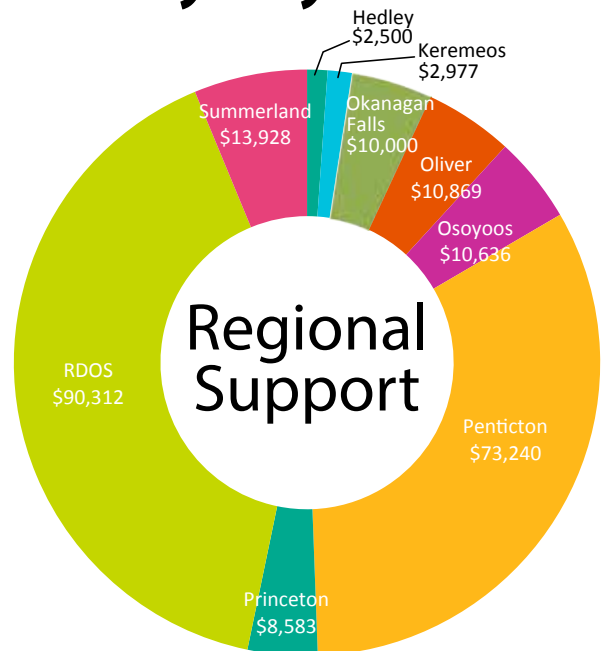
Agur Lake Camp
 Alzheimer Society of British Columbia
 BC Schizophrenia Society - Penticton
 Canadian Freestyle Ski Association
 Canadian Mental Health Association - SOS
 Canadian Red Cross
 Carmi PAC - School District #67
 Civilian Sponsoring Committee for Bighorn Squadron
 Canadian National Institute for the Blind - CNIB
 Doukhobor Heritage Retreat Society #1999
 Dragonfly Pond Family Society
 En'Owken Centre
 Friends of the Summerland Gardens
 Hedley Senior's Centre
 Henning Emergency Clinic of Kindness
 Highway to Healing Support Society
 Island Mountain Arts Society
 Kiwanis Music Festival
 Knights of Pythias Annual Appeal
 Meals on Wheels
 Nickel Plate Nordic Centre
 NK'MIP Desert Cultural Centre
 Okanagan Boys & Girls Clubs
 Okanagan College Foundation
 Okanagan Falls Women's Institute
 Okanagan International Children's Festival
 Okanagan Parks Society
 Okanagan School of the Arts
 Okanagan Similkameen Conservation Alliance
 Okanagan Similkameen Neurological Society
 Okanagan Symphony Society - Kelowna

Okanagan Symphony Society - Penticton
 Oliver/Osoyoos Search & Rescue
 Pathways Addiction Resource Society
 Penticton & Area Access Centre
 Penticton & District Community Arts Council
 Penticton & District Community Resources Society
 Penticton Academy of Music
 Penticton Art Gallery
 Penticton Public Library
 Penticton Secondary School
 Penticton Secondary School PAC - School District #67
 Princeton & District Palliative Care Society
 Princeton Rotary Club
 Princeton Secondary School
 Salvation Army Penticton Corps
 School District #53
 School District #67
 South Okanagan Rehabilitation Centre for Owls
 South Okanagan Secondary School Enrichment
 South Okanagan Seniors Wellness Society
 South Okanagan Similkameen Conservation Program
 South Okanagan Similkameen Medical Foundation
 South Okanagan Victim Assistance Society
 South Okanagan Women in Need
 Stop A Bully
 Summerland Asset Development Initiative
 Summerland Trans Canada Trail Society
 The Land Conservancy-Okanagan Region
 Town of Osoyoos
 UBC Okanagan
 United Way of the Central Okanagan Similkameen

Grants by Area of Interest



Grants by City



Therapeutic Art With Dragonfly Pond Society



Kids and families with disabilities are given a chance to express themselves through art in a pilot project called, Art in Park through Dragon Fly Pond Family Society.

A grant from the Community Foundation of the South Okanagan Similkameen allowed the society to purchase easels, brushes and various art supplies for art sessions that ran in July and August of 2014.

“We just held our first session and it went extremely well with 14 participants and the feedback was very positive,” said Traci Fladager, Program Coordinator at Dragon Fly Pond Family Society.

Dragon Fly Pond Family Society provides services for families with children 0-18 years of age who have complex care needs and/or disabilities and who live in the South Okanagan Similkameen Region.

“Art is very therapeutic,” said Fladager. “It (Art) is a great way for non-verbal children to express themselves through various mediums like chalk and acrylic paint.”

Fladager noted that children are able to create artwork to share with their families and it gives them a discussion piece to share with their parents and siblings.

“Thanks to the grant we received from the Foundation we have the big items like the brushes and easels to continue this program next year,” said Fladager.

“Foundations are about sustainability and this program is utilizing the grant they received for long-term programming that will benefit children with disabilities and their families,” said Aaron McRann, Executive Director of the Community Foundation of the South Okanagan Similkameen.

Environmental Leadership at Pen Hi

When Penticton Secondary School applied for a grant to build a fully functioning greenhouse in the school courtyard at Pen Hi, the Grants Committee of the Foundation showed a keen interest.

The project, ultimately successful in receiving almost \$8,500 from the City of Penticton Trust Fund, would see students build the structure, establish and harvest the plants, and produce healthy meals in the cafeteria for other students.

In total, hundreds of students were involved in the initial project and the greenhouse will now be part of the school’s curricula for years to come. Student groups ranging from students in the Resource and Special Education rooms to the Global Awareness Club and Leadership programs are looking at ways to create self-perpetuating fundraising opportunities.

“This initiative will impact the culture of the entire school and staff,” said Alan Stel, Pen Hi Principal. “One of our mandates is to educate students about sustainable resource development and environmental awareness. These are among some of the critical themes we consider when developing Learning Outcomes directed at preparing our students to become thoughtful and reflective global citizens.”





A citizen shares her photo of the apple she received, along with a RAK card encouraging her to pay it forward. She chose to buy flowers for strangers she met on the street.

Community Knowledge Centre: A Donor's Best Friend

When most people learn about the benefits of giving to charity in their estate they ask a very simple follow-up question:

Who should I make a donation to?

This can be a difficult and daunting decision for people who want to make a real difference in their communities. That sense of overwhelm can be a significant barrier to giving so the Community Foundation set out to make it easier.

In 2014 the Community Foundation began planning to launch a website called the Community Knowledge Centre, which aims to provide donors with all the information to make informed decisions about giving to charities.

The site went live in Fall 2014 and features more than 80 local charities. Check it out at <http://ckc.cfso.net>.

Random Act of Kindness Day launches in 2014

On November 7, 2014 the Community Foundation of the South Okanagan Similkameen launched it's first Random Act of Kindness Day, in collaboration with dozens of other community foundations across Canada.

We live in an amazing region where so much kindness happens every day and #RAKDAYOS was no exception with more than 10,000 Random Acts of Kindness (RAK) carried out in one day on November 7th.

Many businesses, organizations, and individuals went out and performed a RAK and encouraged others to pay it forward.

5,000 Random Act of Kindness Day cards were circulated around the region. The cards encouraged the cardholder to perform a simple act of kindness for someone – a neighbour, a friend, a co-worker, or someone they don't even know – and hand the card over to that person – encouraging him/her to do the same.

The response to this day was amazing with many fantastic RAK's performed by people all over our region – from buying someone a coffee, congratulating someone on a job well done, to paying someone's parking meter, even as simple as holding open a door for someone with their hands full... each act provided citizens with an opportunity to connect with someone else in our community.

Random Act of Kindness Day has continued to thrive in the minds of local citizens many months after the event. In fact, the "Random Act of Kindness Day South Okanagan Similkameen" Facebook page continues to receive new "likes" every week, with the total count now well over 500.

With so much positive momentum continuing after the inaugural event in 2014, we can't wait to see what happens in our region for the next Random Act of Kindness Day!

2014 Financial Summary

SUMMARIZED BALANCE SHEET

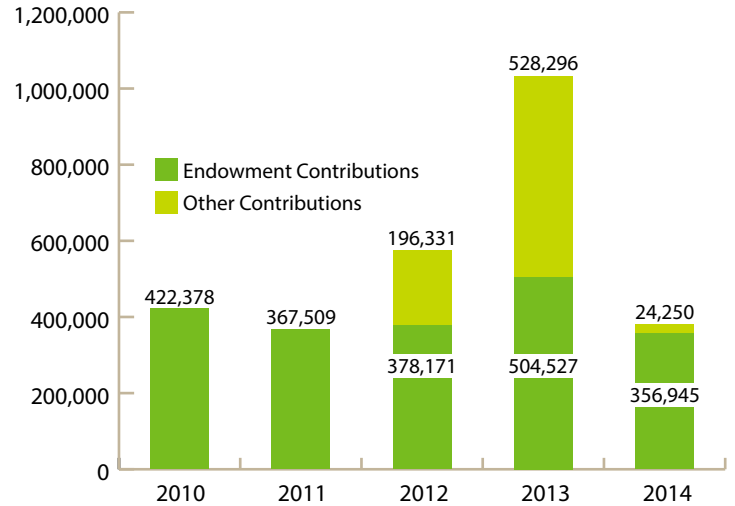
As at December 31, 2014

	2014	2013
Cash, Receivables and Short Term Deposits	148,606	463,049
Investments at Fair Market Value	9,776,029	8,614,775
Accounts Receivable	4,147	12,719
Other Assets	3,085	7,324
	9,931,867	9,097,867
Current Liabilities	15,079	16,437
Managed Funds	854,099	797,408
	869,178	813,845
Invested in Capital Assets	1,620	3,881
Externally Restricted	6,386,068	7,770,276
Internally Restricted	2,552,514	396,965
Unrestricted	122,487	112,900
	9,062,689	8,284,022
	9,931,867	9,097,867

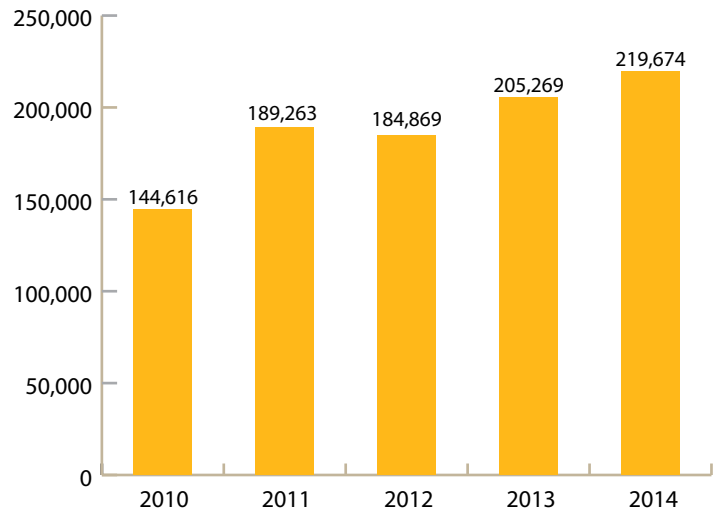
SUMMARIZED STATEMENT OF OPERATIONS

	2014	2013
Revenue		
Investment Income	468,920	402,179
Unrealized Gains on Investments	296,922	546,076
Gifts for Long Term Granting	381,195	1,032,823
Other Income	150,454	144,661
	1,297,491	2,125,739
Expenses		
Grants	219,674	205,269
Administration and Fundraising Expenses	249,152	242,478
Investment Management Fees	50,001	44,995
	518,827	492,742
Excess of Revenue over Expenses	778,664	1,632,997

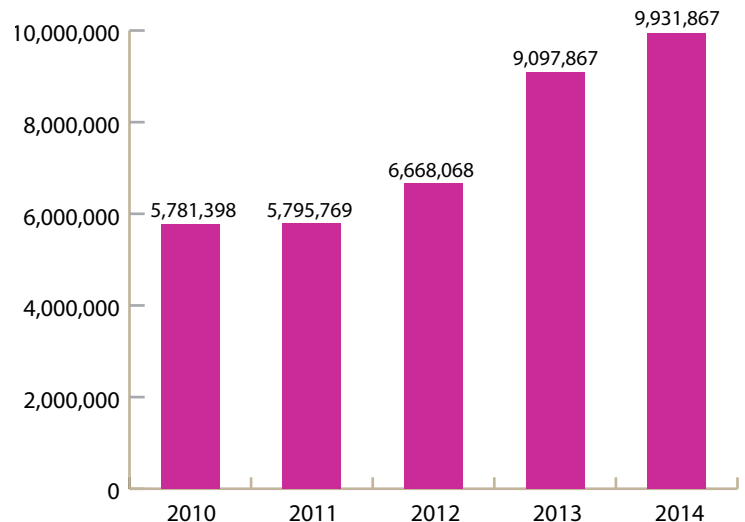
TOTAL CONTRIBUTIONS



TOTAL GRANTS PAID



TOTAL ASSETS UNDER MANAGEMENT



Smart & Caring Community Funds



*Sarah Trudeau
Regional Development Coordinator*

It may not look like much but a small, older building holds the key for one community's answer to feeling connected to their neighbours.

In a small community like Hedley, the Hedley Seniors Centre is a place many people go to connect with others and take part in community events.

The centre has been used to host workshops on community sustainability as well as momentous events like weddings, memorials and community gatherings. Twice a year the town is invited to participate in a Christmas dinner and a summer barbecue at the centre. People are charged a nominal fee of \$2 to cover utility costs.

"It really is the centre our community," said Peggy Terry, treasurer for the Centre. "Locals come and have coffee; they can access the internet, make local and long distance phone calls or just drop in to say hi. It really is a multi-purpose hall."

The Centre also houses the local library and post office, opening the centre to all local citizens to drop in and connect with

others in the community.

The centre currently serves an average of 400 – 500 people per year at various events, helping to give locals a sense of belonging and acting as a vehicle for citizens to stay in touch.

In 2014, the Community Foundation gave a grant to the Hedley Seniors Centre to purchase new, lighter tables that were easy to move around and could be rented out to other organizations.

"It is places like the Hedley Seniors Centre that function as meeting spots and give citizens a place to connect with each other, create meaningful relationships and feel a sense of belonging in their community," said Aaron McRann, Executive Director of the Community Foundation of the South Okanagan Similkameen.

"The tables are a god send, said Terry. "The volunteers, who are mostly seniors, are easily able to set the tables up and move them around. We were able to donate the old tables to the community club, so the grant really is the gift that keeps on giving."

Introducing 100 Women Who Care



100 Women Who Care donate \$2,250 to South Okanagan Women In Need Society

In April 2014 a group of local women gathered to see how they could make a bigger impact in their community by collectively donating to one local charity four times a year and build a legacy for their group. They partnered with the Community Foundation to hold their 100 Women Who Care endowment legacy fund and manage the administration of the program.

There are now more than 100 members of 100 Women Who Care South Okanagan, with each member making a one-time donation of \$100 to the 100 Women Who Care Endowment Fund. Then, at quarterly meetings in April, June, September and November, members donate \$50 to the pot and vote on the charity the group will support.

The group has given over \$15,000 to five local organizations and have built an over \$11,000 endowment fund.

It will be exciting to see what else the 100 Women Who Care can accomplish in the coming years as more people discover the power of pooling their giving to create a lasting impact in the community.

SOUTH OKANAGAN SIMILKAMEEN'S

VitalSigns®

The Community Foundation will be publishing its third Vital Signs report on October 6, 2015. This report has become an integral part of the social landscape of our communities, with donors, funders, municipalities, charities, and others using the report to further the goals of their own programs.

Vital Signs was first conceived by the Toronto Foundation. Foundations across Canada have now become part of the Vital Signs movement, with anywhere from 25 to 35 foundations publishing a report in a given year.

Over its ten year history, Vital Signs has uncovered significant issues at a local level, while also highlighting national needs and priorities.

A program of Community Foundations of Canada, Vital Signs has become a powerful symbol of the role community foundations play in their communities.

As experts in community-level giving, community foundations are uniquely situated to assess community need, engage with stakeholders to determine the best course of action, and engage donors who care about that cause to support implementation required programs.

Vital Signs is one of many tools the Community Foundation uses to increase its impact, be innovative in finding solutions, and to be philanthropic leaders in the community.

The report can be viewed on our website, or call 250-493-9311 to receive your copy.

Community Leadership Team

Kim Lyster - Committee Chair

CFSOS Vice President

Tanya Behardien - Executive Director

Penticton & District Community Resources Society

John Devitt - Executive Director

Penticton & Wine Country Chamber of Commerce

Craig Dunbar - Director

CFSOS Board member

Wendy Hyer - Superintendent

School District 67

Dr. Gerry Karr

Retired physician

Donna Lomas - Regional Dean

Okanagan College

Doug McPherson - Director

CFSOS Board member

Bill Newell - C.A.O.

Regional District of the Okanagan Similkameen

Colleen Pennington - Economic Dev.

City of Penticton

Jane Shaak - Executive Director

Okanagan School of the Arts



VitalSigns®

A Canadian Success Story.
Now a global movement.

27 Canadian
Communities

17 International
Communities

YES

The Youth Engagement Strategy

With the passing of Rohan Crompton-Bell, a generous bequest became a catalyst for major community change. Ms. Crompton-Bell was a woman who cared deeply for the youth of Penticton and sought to raise their self-esteem through gifts to the Community Foundation and the United Way.

Both charities recognized the enormity of the goal of “raising self-esteem” and chose to pool their funds with the Community Foundation. Then began a long process of “community development”, which is characterized by the involvement of a broad cross-section of community members with the goal of building community support for systemic change.

With the Community Foundation acting as the “backbone organization” for the project, a project coordinator was hired to engage local youth in imagining their own better world. The Youth Advisory Committee now numbers more than 40 incredible youth. Service providers have agreed to collaborate to make the project work and a youth engagement worker has been hired to meet vulnerable teens wherever and whenever they need help.

For Melissa, the youth engagement worker, Facebook and texting are primary methods of communication, a strategy that has introduced her to some of Penticton’s most vulnerable youth.

Steering Committee

- Kim Lyster - Committee Chair**
CFSOS Vice President
- Amberlee Erdmann, Coordinator**
CFSOS
- Amy Woodruffe - Research**
CFSOS
- Wendy Hyer - Superintendent**
School District 67
- Cindy McLean**
Ministry for Children & Families
- Peggy Joe - Executive Director**
Ookanakne Friendship Centre
- Terri Kalaski - Restorative Justice**
Penticton RCMP
- Greg McGowan - Board member**
United Way
- Lori Mullin - Recreation Manager**
City of Penticton
- Emma Reiter, Student**
Penticton Secondary School
- Emily Russell, Student**
Penticton Secondary School
- Jane Drapeau**
Community Member



Brainstorming notes from a YES Project Youth Advisory Committee meeting. The outcome? Focus on emergency needs for the most vulnerable youth.

From helicopter crashes to bursaries

Mary looked out the window with dread. Flames were shooting from the engine of the Sikorsky S-76 medivac chopper she was flying in. The pilot's voice was calm, as if he was talking about vanilla ice cream, and it made her wonder if she sounded the same way to her patients. "We're going to do a reverse thrust landing," the pilot was saying, making it sound very normal.

After the pilot successfully "crashed" the helicopter the team began the long journey back to safety. Mary spent much of that journey contemplating the risks she and others were taking in servicing these remote communities.

When Mary finally arrived in the northern village she was greeted by a young man's frantic mother. She rushed to the small nursing outpost station where a nurse practitioner was working to keep the patient stabilized.

Her patient was yet another young man feeling hopeless and desperate enough to attempt suicide. Mary gave him morphine and IV fluids and assessed him for pneumothorax (punctured lung) before flying him back to the hospital in Moose Factory.

On the flight to the hospital, Mary spoke with the young man, connecting on a human level and trying to understand his situation and motivation for attempting suicide. Extreme poverty, disease, substance abuse, and lack of opportunity were the usual suspects. Luck was with him on this occasion though, as his life was saved by a vascular surgeon who just happened to be vacationing at a fishing lake near the hospital.

While the engine fire was anything but routine for the Holt's, rushing into the wilderness to save someone from attempted suicide was a depressingly common occurrence. Northern citizens were transitioning from their

nomadic, agrarian history to sedentary communities. The transition left many people feeling desperate and hopeless, but always incredibly grateful for any help they received.

Mary and Bill Holt met in 1980 while attending university. They were drawn together by their mutual desire to help others, strong family ties, and an abundant sense of adventure.



Michael Peeman - recipient of the South Okanagan First Nations Bursary Award

Their thirst for adventure drove them to do their residency at Queens University, which included working in Moose Factory, Ontario, home to a hospital that served many remote northern villages.

Working as interns in this area was truly a baptism by fire. "In the years since Moose Factory," says Bill, "I have never seen the volume of critically ill children as in those communities. TB was rampant. Young babies were almost unresponsive, their respiratory issues were so severe."

Every intern wants to ease suffering and heal the sick, but Bill and Mary quickly learned that medicine was not enough to heal the wounds in those villages. They struggled to make sense of the impact they were having and the abiding feeling that they could never really help enough. The overwhelming odds facing their patients made their efforts feel like too little too late. The immediate issues were medical, but the core problems were systemic, historical, cultural, and tragic.

The Holt's eventually set up practice in the Okanagan, but they never forgot their time in the north. In fact, they speak of it often with their children, always thinking about the complexity of the circumstances faced by their patients.

Their desire to keep helping lead the Holt's to donate \$10,000 to the Community Foundation's Smart & Caring Fund while studying ways to make a real difference in First Nations communities. They became convinced the solution was to empower and educate grassroots leaders to bring their skills home and help their people.

In consultation with the Foundation, the Holt's created the South Okanagan First Nations Bursary Fund for aboriginal students. Priority is given to positive role models who will return to their communities

When the Foundation published a story in the local newspaper announcing the \$10,000 gift from an anonymous donor (at the Holt's request) another anonymous donor added \$10,000 more to the fund, which now sits at over \$30,000.

Today, the Holts know they are making a lasting difference to the people they care about. They are grateful for the opportunity to provide annual bursaries, for the generous donor that added to their Fund and, most of all, for the brave First Nations students moving forward and changing their world.

The Meiklejohn Family Fund

Many long-time Penticton residents are probably familiar with the last name Meiklejohn, which established its first architecture firm in the city more than 60 years ago. Ever since Carol and her late husband, Roy, moved to the area and opened their practice back in 1953 they've been committed to investing in the community.

The couple adopted that same mindset when they started the Meiklejohn Family Fund through the Community Foundation of the South Okanagan-Similkameen in September of 2001. However, rather than being specific in where the money would be distributed they wanted to leave it to the discretion of the Community Foundation.

"It seemed like a very good idea and for us, it was kind of an investment in the community and we had so much based in the way Penticton was developing and we were thinking of Penticton at that point not the larger area," said Carol. "We may have had preferences but because we wanted the money to go where it was probably needed most we thought that it was better that the organization decided where they put the money."

The Meiklejohns raised four boys in the city (three are architects; the other is a musician), were involved in many aspects of the community and felt strongly about Penticton and its positive relationship with their business.

"I think it's important as a citizen of a community, I think you have a responsibility to be involved in what happens as far as it develops," she said. "We weren't alone in this but there were so many people that felt that there was that responsibility and were quite happy to be involved in contributing."

When they began exploring options for establishing a fund Carol and Roy had already heard of the Community Foundation. "It was quite new at that point and we were just eager to be part of that and being able to contribute seemed like such a good idea," she said.

"I think the Foundation has been good at keeping us/me informed and every year I get some information about where the money went, who received the funds."

Carol was raised in Vancouver and Roy wound up in the army in Vernon. By the time they married both had fallen in love with the Okanagan Valley and especially Penticton.

"We felt that if we could make a go of it here then this is where we wanted to be," she said.



Carol Meiklejohn stands near the front entrance to her Penticton home. She and her late husband, Roy, established Meiklejohn Architects, the first architecture firm in the city in 1953. In 2001 they established the Meiklejohn Family Fund through the Community Foundation of the South Okanagan-Similkameen.

Carol said they felt good about the Community Foundation and trusted that the money would be invested wisely to create a fund that would continue to increase in revenue as time passed. She feels because a fund grows and continues in perpetuity it bodes well for the future of the Foundation and for fund holders such as herself.

"I think that's very important and that should encourage people that have questions to contribute because they know the basic funds will always be there and will continue to grow so there will be more money available every year," said Carol.

Community Foundation Legacy Club

The Legacy Club is a group of very special individuals who have made a commitment to their community with a gift that will support local needs far beyond the donor's lifetime.

Membership in the Legacy Club is reserved for those who feel passionate about creating a Legacy Gift for the charities and causes they care about most.

A Legacy Gift is a donation to the Community Foundation from an individual's estate. In most cases, this gift is set up as an endowment fund with the original donation being held permanently as capital.

This capital is then invested with investment earnings being granted to local charities. Some Legacy Club members will identify the charities they wish to support with their endowment fund, while others may wish to have the Community Foundation select recipient charities based on current community needs and priorities.

You should consider the Legacy Club if:

- You give regularly to the same causes and want to provide continued support after you pass away.
- Your estate may incur significant tax costs upon your passing.
- You would rather give to charity than to government.

*Dr. John Allan Garland
Legacy Club Member*



2 Step Membership

1. Include the Community Foundation as a beneficiary in your will, RRSP/RRIF, or life insurance policy.
2. Tell us about it by completing the Legacy Club Pledge.

Just in Case Planning Guides

The brainchild of Mr. Harold Empey, Just in Case Planning guides are now being offered by the Community Foundation of the South Okanagan Similkameen as a way of
(1) encouraging people to properly plan their estate
(2) promoting philanthropy in general

The Foundation has an over-arching goal to be philanthropic leaders in the communities we serve. For us, this means educating the public about the benefits of planned giving and organizing one's estate. It also means encouraging more people to give to the charities they care most about.

To further this goal, the Foundation is offering free Just in Case seminars throughout the region. In addition, Just in Case binders are for sale at the Foundation's office.

For more information please call 250-493-9311.

Setting Up Your Will

Including the Community Foundation in your will ensures that your gift will provide ongoing support for community needs in perpetuity.

An appropriate clause could be as simple as naming the Community Foundation as a beneficiary.

However, for individuals who would like to be more clear about the intent of their gift it is advisable to discuss the details with their lawyer and with Foundation staff.

If in doubt, be sure to remember these two words: "in kind". "In Kind" donations are usually the most effective way to donate, increasing the value of the gift to the charity and reducing capital gains costs for the estate.

Endowment Funds

UNDER \$10,000 VALUE

100 Women Who Care Fund
Alanna Matthew Memorial Fund
Critticaid Legacy Fund
Drapeau Wealth Management Legacy Fund
Friends of the Summerland Gardens
Hugh & Eva Cleland Fund
Leonard Futter Fund
Lynn & Brian Jackson Endowment for Fine Arts
Magdus & Roy Ornamental Gardens Legacy Fund
Marjery Punnett Bursary Fund
Marjorie Maclean Fund
Merle Waite Endowment Fund
Music Under the K Fund
Okanagan Boys & Girls Clubs Fund
Okanagan Nation Women's Emergency Fund
Okanagan Regional Library Fund
Schellenberg Family SOPAC Fund
SOS Brain Injury Fund
Toni & Bernie Cattani Legacy Fund for the Arts
Winkelaar Family Fund
Wood Family Fund

\$10,000 - \$20,000 VALUE

1996 BC Festival of the Arts Fund
BC Schizophrenia Society - Penticton Fund
Brule Windeler Legacy Fund
Canadian Federation of University Women Fund
Charlotte Campbell Memorial Fund
Children's Trust Fund
Frances Harris Fund
Francis & Marion Kanuit Fund
Friends of the Gardens Fund
Ina May Scott Fund
Irvine & Doreen Adams Memorial Fund
Knights of Pythias - Fund #1
Lan & Pearl Fruno Legacy Fund
Lower Similkameen Community Fund
Meiklejohn Family Fund
Neil and Shirley Murray Family Fund
Okanagan Similkameen Concert Society Fund
Oliver Community Fund
Osoyoos Community Fund
Pat Clarke Memorial Bursary Fund
Penticton & District Community Arts Council Fund
Penticton Oldtimers Hockey Club Legacy Fund
Penticton Women In Business Fund
Princeton & District Legacy Fund
Rita Fawcett Memorial Fund
Ron & Debbie Bell Fund
Scott & Helen Perry Bursary Fund
SO Boundary Labour Council Fund
South Okanagan Women in Need Agency Fund
Summerland Community Fund
Thea Haubrich Legacy Fund

\$20,000 - \$50,000 VALUE

Kristi's "Supporting the Dream" Fund
2004 BC Seniors Games Legacy Fund
Colin & Lois Pritchard Foundation Fund
COP Centennial Legacy Fund
Greenwood Forest Products Legacy
Harman Community Development Fund
Harold & Donna Schellenberg Legacy Fund
Harold & Irene Myers Family Fund
HSBC Fund for Youth
John Pankiw Family Fund
MS Anonymous Fund
Patricia & Murray Craig Memorial Endowment Fund
Penticton Auto Dealers Fund
Richard & Rose Cooper Fund
Rotary Club of Penticton Legacy Fund
Sharon Amos Legacy Fund for the Arts
SO Secondary School Enrichment Fund
SOSCP Legacy Fund
South Okanagan First Nations Education Fund
The Land Conservancy-Okanagan Region Fund
Tony & Judy Lloyd Family Fund
Trehearne Family Fund

\$50,000 - \$100,000 VALUE

Harold & Flora Hoey Fund
Kelly Family Fund
Knights of Pythias Lodge #49 Fund 2
Okanagan Fest-Of-Ale Legacy Fund
Oliver Rotary Endowment Fund
PDCRS Fund
Penticton Art Gallery Legacy Fund
Ramada Inn Viticulture Fund
Allan P Markin "Whatshan Retreat" Fund"
1995 Summer Games Legacy
Barbara Pearce Summerland Community Fund
Bob & Frances Garland Fund
Business Gives Back Fund
Crompton Bell Endowment Fund
Environmental Legacy Fund
John & Doreen Wisenden Fund
Lilli Schneider Memorial Fund
MacFarlane Fund
NK'MIP Desert Cultural Centre Legacy Fund
Okanagan College Endowment Fund
Okanagan Symphony Society-Penticton Branch Fund
Penticton & District Fund
Penticton Public Library Fund
Summerland Credit Union Fund
United Way Tomorrow Fund

OVER \$500,000 VALUE

City of Penticton Trust Fund
Dr. John and Kathy Scarfo Fund
Lancey Family Fund
Penny Lane Community Legacy Fund

Thank you to our Friends of the Foundation



Mr. Hugh Richter



Ms. Gillian Holland



Ms. Sharon Romank

Friends of the Foundation are leaders in our communities who recognize the importance of the community leadership work undertaken by the Community Foundation. Their support allows the Foundation to play a pivotal role in developing Smart & Caring Communities throughout our region.

For more information about the Friends of the Foundation program please contact Aaron McRann, Executive Director of the Community Foundation.