

**YOUR COMMUNITY  
MAKES YOU**

**AND YOU MAKE  
YOUR COMMUNITY**

**THROUGH YOUR  
COMMUNITY FOUNDATION**

**BRINGING PEOPLE  
AND CAUSES  
TOGETHER**

**TO CREATE  
SMART & CARING  
COMMUNITIES**



**COMMUNITY  
FOUNDATION**

south okanagan | similkameen

**2015**  
ANNUAL REPORT



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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.

## A Message from the President & Executive Director

**When you look at your community what do you see? Do you see opportunity? Suffering? Beauty? Risk? Stagnation? Growth?**

**If you're like us you probably see all of those things. The communities of the South Okanagan Similkameen are wonderful places to live, work and play. We that live here know we're fortunate to call this place home.**

We love our communities almost like a parent loves their child: flaws, challenges and all. But that doesn't mean we don't work to make things better, to minimize the challenges and to mitigate the flaws. We love where we live and we love it enough to make it better.

The Community Foundation is very proud to support donors throughout our region who see a need and feel compelled to address it. We work with donors to achieve their own personal giving goals and to support our communities' most dire needs. Some donors want to protect the environment while others wish to support child welfare, seniors, or the arts.

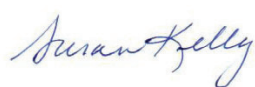
The Foundation helps donors support any charitable goal in the community. With \$10 million in assets under administration, the Foundation is now granting more than \$350,000 per year to local community-building projects. Half of this granting is pre-defined by donors (automatically granting to a specific charity) each year while the other half of the granting allows the Foundation to select charities based on community need. In most cases, these "discretionary" grants will still be taking a fundholders' special areas of interest into account.

Our goal is to build smarter and more caring communities and we know we can't do it on our own. We need to partner with people like you who care deeply about the place they call home. We also need to find innovative ways (beyond just granting) to support the efforts of local charities. We need to spread the word about the importance of philanthropy. And, most of all, we need to come together as a community to look out for each other, look after each other, and enjoy each other's company.

Regards,



**Susan Kelly**  
President



**Aaron McRann**  
Executive Director



# What 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 or 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 Regional District of Okanagan-Similkameen (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:

1. Cultivate and grow permanently endowed legacy funds which are invested wisely for the long term benefit of the community.
2. Share the legacies by making effective grants from the investment earnings to seed, nurture and support a broad range of community initiatives.
3. Provide leadership in our communities by encouraging collaboration among charitable agencies, facilitating learning and convening opportunities for all.

## 2015 Board of Directors

Susan Kelly, President  
Kim Lyster, Vice President  
Marielle Brule, Treasurer  
Patrick Bell  
David Braumberger  
Craig Dunbar (resigned December 2015)  
Tom Kampman  
Graham Lyle  
Doug McPherson  
Matt Kenyon  
Bruce Hallquist  
Robin Robertson

## Foundation Staff

Aaron McRann  
Executive Director  
  
Sarah Trudeau  
Regional Development Coordinator  
  
Kelly Helfrich  
Administration



# Strategic Priorities

## #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.

9 types of funds to support unique giving goals

61 charities received grants in 2015

110 endowment funds

\$344,000 granted to charities throughout the RDOS in 2015

\$10.2 million managing more than \$10 million in assets

1% administration fee charged on funds

## #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.

Types of gifts:

- Cash
- Bequests
- Real Estate
- Publicly Listed Securities
- Life Insurance Policies

100 | WOMEN  
*Who Care*

 **COMMUNITY  
KNOWLEDGE CENTRE**  
Community Foundation of the South Okanagan | Similkameen

SOUTH OKANAGAN SIMILKAMEEN'S

**VitalSigns®**

## #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 variety of offerings to donors, by hosting conversations and free educational forums on charitable giving to build a culture of philanthropy in our communities.

- Income Tax & Estate Planning Workshops for citizens
- Grant Writing Workshops for charities

**SMART & CARING  
COMMUNITIES**

**YES**

Youth Engagement Strategy

Random Acts of Kindness Day

**JUST IN CASE**  
Planning Guide

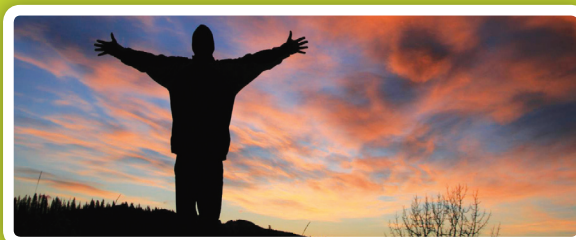
## 2015 Grants to the Community

- Agur Lake Camp
- Alzheimer Society of British Columbia
- BC Schizophrenia Society - Penticton
- British Columbia Institute of Technology
- Canadian Cancer Society
- Canadian Freestyle Ski Association
- Canadian Mental Health Association - SOS
- Canadian National Institute for the Blind
- Capilano University
- City of Penticton
- Civilian Sponsoring Committee for 232 Bighorn Squadron
- D.A.R.E. British Columbia Society
- Doukhobor Heritage Retreat Society #1999
- Dragonfly Pond Family Society
- Friends of the Keremeos Skating Rink
- Friends of the Summerland Research Station Gardens
- Island Mountain Arts Society
- Knights of Pythias Annual Appeal
- Meals on Wheels
- Multiple Sclerosis Society - South Okanagan
- NeighbourLink Summerland
- Neil Squire Society
- Nickel Plate Nordic Centre
- Nk'Mip Desert Heritage Society
- Okanagan Boys & Girls Clubs
- Okanagan College Foundation
- Okanagan International Children's Festival
- Okanagan Nation Family Intervention & Services Society
- Okanagan School of the Arts
- Okanagan Similkameen Conservation Alliance
- Okanagan Similkameen Neurological Society
- Okanagan Similkameen Parks Society
- Okanagan Similkameen Stewardship Society
- Okanagan Symphony Society - Kelowna
- Okanagan Symphony Society - Penticton
- Oliver/Osoyoos Search & Rescue Society
- Osoyoos Child Care Society
- Osoyoos Desert Society
- Pathways Addiction Resource Society
- Penticton & Area Access Society
- Penticton & District Community Arts Council
- Penticton & District Community Resources Society
- Penticton & District Emergency Program Society
- Penticton Academy of Music
- Penticton Art Gallery
- Penticton Indian Band
- Penticton Kiwanis Music, Dance & Speech Arts Festival
- Penticton Public Library
- Penticton Recovery Resource Society
- Penticton Secondary Schools Bursary & Scholarship Program
- Penticton Writers and Publishers
- Princeton Rotary Club
- Regional District of the Okanagan Similkameen
- Salvation Army Penticton Corps
- School District #53 - Okanagan Similkameen
- School District #58 - Nicola Similkameen
- School District #67 - Okanagan Skaha
- South Okanagan RECOPE Society
- South Okanagan Rehabilitation Centre for Owls
- South Okanagan Secondary School Enrichment
- South Okanagan Seniors Wellness Society
- South Okanagan Similkameen Medical Foundation
- South Okanagan Victim Assistance Society
- South Okanagan Women in Need Society
- Summerland Asset Development Initiative
- Summerland Food Bank
- The Land Conservancy of BC - Okanagan Region
- Town of Osoyoos
- UBC Okanagan Foundation
- United Way of the Central Okanagan Similkameen
- Village of Keremeos

### Life Over the Influence

Pathways Addictions Resource Centre offer services to over 500 new clients each year. Along with people seeking help for their substance use issues, Pathways also serves family members whose lives are being affected by their loved one's substance use. Through a grant provided by the Community Foundation, Pathways is able to offer a program entitled "Life Over the Influence" to assist these family members.

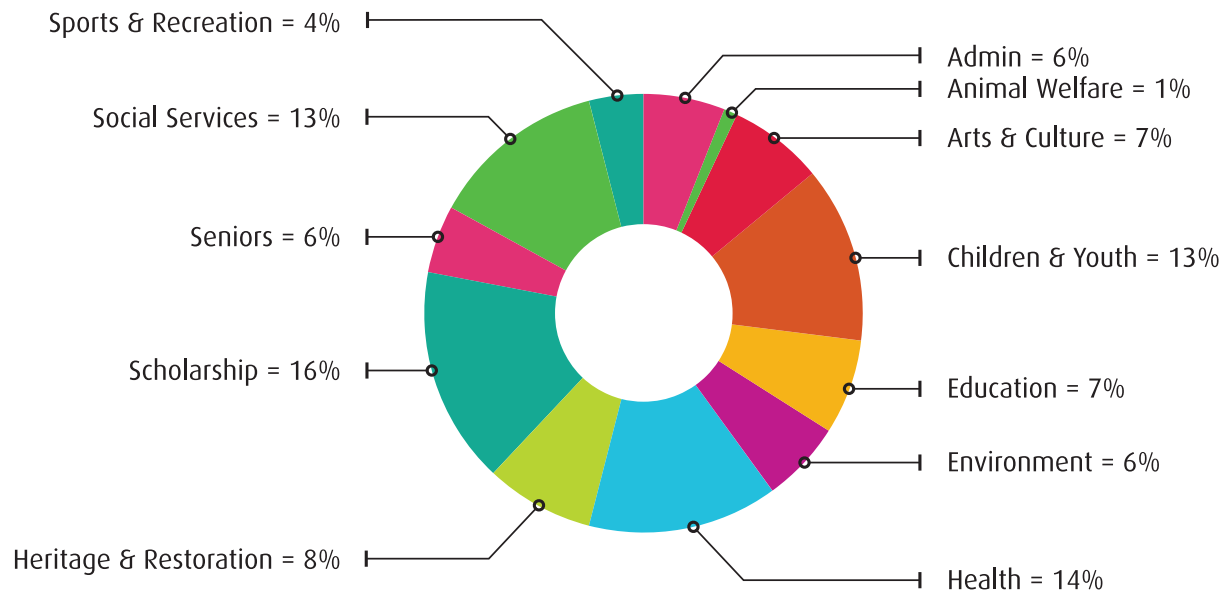
As a society we tend to focus on the person who has the substance use issue and we often neglect the other people in a person's life who are also being dramatically affected by addiction. Families where addiction is present can be very painful to live in. Family members can become consumed by the disease to such an extent they lose their sense of normal. Many of the family members suffer in silence and walk on eggshells trying to avoid further conflict. Both the substance user and the family members, including children, become traumatized to various degrees and may live in constant fear of the unknown, feeling there is no way out of their desperate situation.



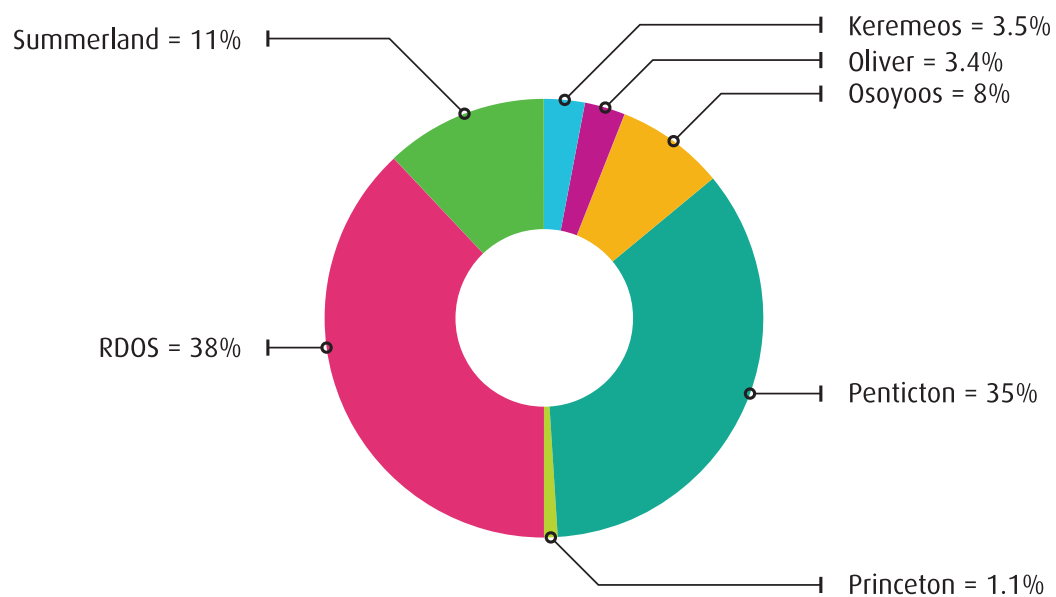
The aim of this program is to stop the pain and fear, get rid of anger and shame and provide them with a roadmap for getting on with their lives so that they can live their lives Over the Influence of their loved one's substance use. The family dynamic in drug and alcohol addiction is incredibly powerful, and addressing an unhealthy situation is the first step in moving toward recovery. This type of positive family involvement can also help lead the rest of the family toward a journey of recovery and self-discovery. The demand for this program has grown exponentially as family and community members witness the positive impact it has had on so many lives.



## Grants by Area of Interest



## Grants by City



# 2015 Financial Summary

## Summarized Balance Sheet

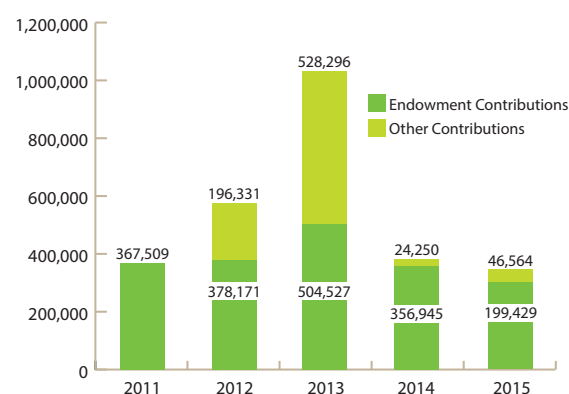
as at December 31, 2015

	2015	2014
Cash, Receivables and Short Term Deposits	240,314	148,606
Investments at Fair Market Value	9,950,444	9,776,029
Accounts Receivable	1,988	4,147
Other Assets	3,003	3,085
<b>Total Assets</b>	<b>10,195,749</b>	<b>9,931,867</b>
Current Liabilities	14,712	15,079
Managed Funds	907,999	854,099
<b>Total Current Liabilities</b>	<b>922,711</b>	<b>869,178</b>
Invested in Capital Assets	1,614	1,620
Externally Restricted	6,540,864	6,386,068
Internally Restricted	2,598,211	2,552,514
Unrestricted	132,349	122,487
<b>Total Net Assets</b>	<b>9,273,038</b>	<b>9,062,689</b>
	<b>10,195,749</b>	<b>9,931,867</b>

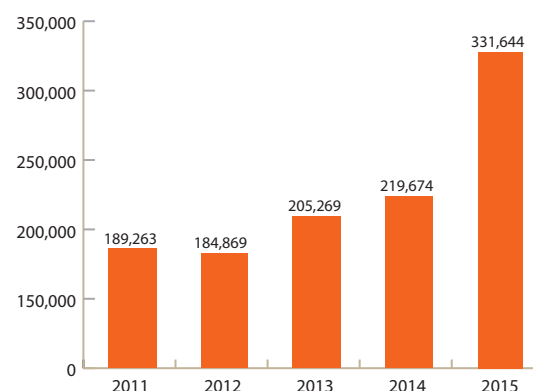
## Summarized Statement of Operations

	2015	2014
Revenue		
Investment Income	648,148	468,920
Unrealized Gains on Investments	0	296,922
Gifts for Long Term Granting	245,993	381,195
Other Income	189,136	150,454
	<b>1,083,277</b>	<b>1,297,491</b>
Expenses		
Grants	331,644	219,674
Administration and Fundraising Expenses	307,707	249,152
Investment Management Fees	52,110	50,001
Unrealized Losses on Investments	183,469	0
<b>Total Expenses</b>	<b>872,930</b>	<b>518,827</b>
<b>Excess of Revenue Over Expenses</b>	<b>210,347</b>	<b>778,664</b>

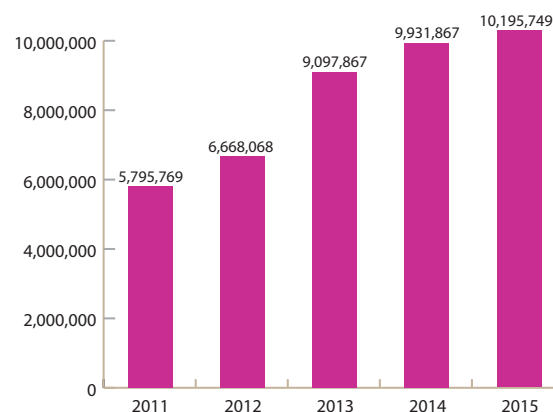
## Total Contributions



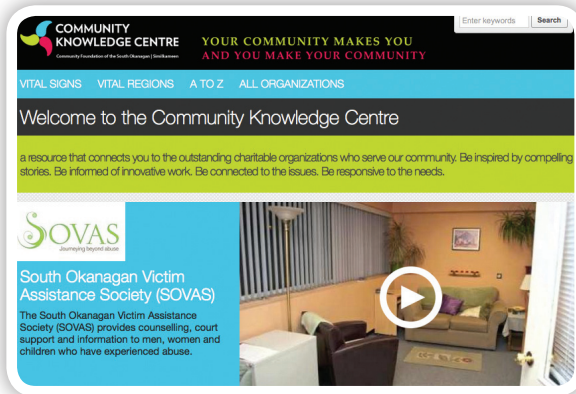
## Total Grants Paid



## Total Assets Under Management

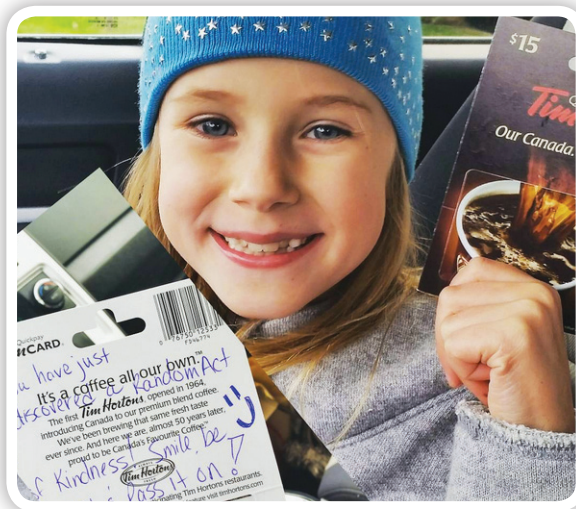






## Community Knowledge Centre

Our foundation is one of five in Canada to offer a new service to local charities and donors called the Community Knowledge Centre (CKC). It's time consuming for charities to apply for grants. The CKC reduces the time required to apply for grants from us by offering organizations an ongoing profile that they simply update each year (rather than re-creating each time). This profile is also open to the public, our donors and other funders can learn more about the charities on a professional, well-structured website.



## Random Act of Kindness Day

On November 6, 2015, the Foundation hosted our 2nd annual Random Act of Kindness Day (RAK Day). Once again, the event was a huge success and we were amazed by the level of energy and generosity displayed by citizens throughout the RDOS.

RAK Day is just one way we engage the community in actively creating a better society. Yes, we can ask for donations and provide grants, but in the end we all need to be involved in making our communities better. RAK Day helps us encourage and celebrate this opportunity.

Thank you to everyone for making the 2nd annual event such a huge success!



## 100 Women Who Care

Now in it's third year of fun and philanthropy, 100 Women Who Care has become a force for good in Penticton. More than 100 women participated in 2015 and more than \$16,000 in grants were awarded to local charities.

Members meet quarterly for wine, appies, networking and the opportunity to award about \$5,000 to local charities! Mingling with friends and supporting charity at the same time... what could be better??

# Donna and Harold Schellenberg

By SCOTT TRUDEAU

**An Okanagan Symphony concert is entertaining but the cost to host such an event may surprise some.**

"When we get a concert down here (Penticton) it depends how large the orchestra is and if it has a guest artist," said Donna Schellenberg, whose ties to the symphony date back more than 50 years. "It can cost anywhere from \$50,000 to \$70,000 per concert. Of course that takes into consideration all of the staff work that's done ahead of time to get the music and pay the bills and what have you so it's all inclusive—it's a huge chunk of change."

To assist with these costs, the Harold & Donna Schellenberg Legacy Fund established through the Community Foundation of the South Okanagan Similkameen provides financial help to the Penticton branch of the Okanagan Symphony.

Donna noted that ticket sales for these events account for half of the Okanagan Symphony's overall budget so the Schellenberg's fund – which was started in 2008 – is essential to ensuring a successful concert.

She said like another of the fund holders, she and Harold are at an age where, rather than receive a gift from family members during a special occasion, they're encouraging donations towards their fund instead.

After five decades of being involved with the Okanagan Symphony, Donna has been a part of most areas of the organization. "At first it was just going to a concert and then it was helping make sandwiches, that kind of stuff," she said. "Then I volunteered with the local committee and did several things, including acting as committee head for a time. Membership is where I've spent most of my time, though, and that's a huge job, one of the biggest committees."

More recently Donna heads a committee that established a



Donna and Harold Schellenberg started a legacy fund through the Community Foundation of the South Okanagan Similkameen to provide financial assistance to the Penticton branch of the Okanagan Symphony.

Photo by Scott Trudeau

newer public fund through the Community Foundation titled, Okanagan Symphony Penticton Branch Fund, to which anyone can make a donation.

"A lot of people have donated to it," she said. "Anything from \$25 in memorial to \$5,000. We've had people donate over \$5,000."

Prior to 2008, when they started their family fund, her knowledge of the Community Foundation was limited. "I didn't know an awful lot about it. It was a big learning curve," Donna said.

One of the benefits associated with funds established through the Foundation is that the fund holder can be specific in deciding where the money goes and how it is used.

"We wanted to make sure that there was something that was ongoing so that the symphony would get some kind of a return every year," said Donna. "Instead of trying to have a fundraiser every year and not knowing whether it's going to work or not, this is for sure, it's for certain."

"The goal of the fund is to help make the Symphony sustainable because the reality is that it costs an incredible amount of money to put on these shows," she said.

Donna said she appreciates anyone wishing to make a donation to assist the symphony now and in the coming years.

"I would sure encourage anybody who would like to see the symphony continue to give to the Okanagan Symphony Penticton Branch Fund," she said.



Okanagan Symphony Orchestra



# A Legacy from the Heart

By ERIN TRAINER

**If you've lived in Princeton for a while, you've likely met George Kassa. He called the small town home for 83 years, and until his death in 2014, he put his heart into his community.**

"My dad was extremely proud of Princeton," says Kassa's son, Bryan. "Even in his final years, he was at the museum a couple times a week going through old photos and identifying people, places and events."

Now Bryan is carrying on his father's legacy by setting up a \$10,000 endowment fund through the Community Foundation of the South Okanagan | Similkameen (CFSOS). The money will be used to support community groups in Princeton.

"I've been a director of the Shuswap Community Foundation for six years, and I've seen the benefits," says Bryan, a Salmon Arm resident. "The grants we give go a long way to enhancing the quality of life in our community, and I know Dad would want the same in Princeton."

George Kassa was born in 1926 in Czechoslovakia. Three years later, his family moved to the Princeton area where his father worked for Canadian Pacific. Kassa later met his wife Eva, a nurse in town, and secured a position with the highways department as a heavy duty mechanic.

Bryan says his parents were down-to-earth, working-class people. They also believed in community involvement. "Princeton felt like home. My dad knew everyone, and everyone knew him. He felt a sense of responsibility to give back."

Kassa was part of the volunteer fire department for more than three decades. In 1959, he helped open the Princeton Credit Union and served as its president for 12 years. "At one point, he volunteered to be a guarantor for the community's new ambulance," Bryan laughs. "I don't think mom was too happy but that's who dad was." In the last year of his life, Kassa also volunteered at the Museum.

Bryan hopes this donation will spark more interest in Princeton, and encourage those who are estate planning to consider the CFSOS. The foundation invests donations, and distributes grants each year using the interest generated. Donors can make a general donation or specify a community or group where they would like their money to go. Bryan and his wife Patti will be contributing more money to his father and mother's fund in the future.

"Many people leave money in their wills for a specific project, and while that may be an important cause, once the money has been spent, that's it," says Bryan. "On the flip side, by donating to the Community Foundation, you are contributing to an endowment fund that operates in perpetuity, spinning off investment income for new grants each year. Long after I'm gone, dad's fund will keep going."

Through Bryan's experience with the Shuswap Community Foundation, he's also observed that a community's needs change over time, and often those changes can't be predicted. He says endowment funds give foundations the flexibility to respond

because the money is always there.

There are 191 independent Community Foundations across the country. Canada's oldest community foundation is the Winnipeg Foundation. The largest, with more than \$1 billion in assets, is the Vancouver Foundation.

"When people donate their hard-earned money, their hope is that it will be spent wisely. I can't think of a better way to ensure this, and leave a lasting impact, than through the Community Foundation," says Bryan.



George and Eva Kassa

The Kassa Fund will help support the granting that is already occurring in the Princeton area. Recently, the CFSOS granted \$14,700 to the community kitchen at the Riverside Community Centre, \$2350 to the Princeton and District Palliative Care Society, and it continues to fund an annual bursary for Princeton high school students. The vast majority of this funding, to date, has come from endowment funds that have no geographic restrictions and allow the foundation to support charities from throughout the region.

## SOUTH OKANAGAN SIMILKAMEEN'S

# VitalSigns®

**How are we doing as a community? How is our economy? Is the arts scene as vibrant as you would hope? Are seniors and youth well looked after? What about education? Is there a housing crisis or isn't there?**

The Vital Signs report, published for the 3rd time in October 2015, highlights the opinions of local citizens on all of these questions and more. With more than 1500 survey responses, this Vital Signs report more than doubles the information provided by citizens and nicely supplements the statistical data collected by the Foundation from many authoritative sources.

The Community Foundation uses Vital Signs to help guide its grant making decisions, strategic planning and community relationships. The report is also used by other charities for their own strategic planning processes and as reference material for

grant applications to the Foundation and many other funders. Donors and fundholders use this report, as well, to help them make decisions on how best to leverage their donations and grants from their own endowment funds.

Knowledge is power and Vital Signs helps everyone gain the knowledge to create positive change in their community. The bottom line is that it takes engaged citizens to make a community better. Nobody can do it alone and Vital Signs is a great place to start that journey... together.

The report can be viewed on our website ([www.cfso.net](http://www.cfso.net)) or call 250-493-9311 to receive your copy.

Survey Grade:

**B+**





Vital Signs now includes "3 Things You Can Do...  
Community Action ideas you can implement today!"

## 3 Things you can do!

1. Make 30 - 60 minutes of daily activity a protected priority in your life.
2. Feeling depressed or stressed? Share your feelings with family, friends or professionals.
3. Tackle obesity: start or join a support group.

## Community Leadership Team:

**Kim Lyster** – Vice President, Committee Chair, Community Foundation of the South Okanagan | Similkameen

**Tanya Behardien** – Executive Director, Penticton & District Community Resources Society

**John Devitt** – Executive Director, Penticton & Wine Country Chamber of Commerce

**Craig Dunbar** – Director, Community Foundation of the South Okanagan | Similkameen

**Ryan Foster** – President, Food Foresters Society of Canada

**Wendy Hyer** – Superintendent, School District 67

**Dr. Gerry Karr** – Retired physician

**Donna Lomas** – Regional Dean, Okanagan College

**Doug McPherson** – Director, Community Foundation of the South Okanagan | Similkameen

**Bill Newell** – Chief Administrative Officer, Regional District of the Okanagan Similkameen

**Colleen Pennington** – Economic Development Officer, City of Penticton

**Jane Shaak** – Executive Director, Okanagan School of the Arts, Shatford Centre



## Mercedes Skoglund

Mercedes Skoglund is not your typical 18 year old. Mercedes has endured the burden of extra responsibility that is often imposed on the oldest child when a family struggles. At the age of nine she was forced to assume some responsibility for looking after her three younger siblings, all while trying to continue in school and understand what was happening to her family.

"In 2010, I joined the Air Cadet program," said Mercedes, "and it changed my life for the better. I was taught discipline, leadership, and how to be responsible for my actions." She went on to become a Flight Sergeant at 232 Bighorn Squadron in Oliver and was personally responsible for 16 cadets.

When Mercedes applied for the Dr. John & Kathy Scarfo Bursary in 2015 the selection committee was struck by her positive attitude, resilience in the face of adversity, and desire to make life better for herself and her family. She was awarded a \$6,000 bursary to pursue the Trades Discovery Program at BCIT which introduces students to many different trades so they can discover the career that best suits their interests.

This year of discovery has served Mercedes well as she is now enrolled in the Aircraft Maintenance Engineer program at BCIT, a full time course load that takes 4 years to complete at the Aerospace Campus in Richmond, BC. When considering future job opportunities Mercedes says, "Air Canada is always looking for people, especially those who go through BCIT. They came in and hired all 32 of last year's graduates on the spot."

"Without the bursary I would have to say that none of this would have been possible," says Mercedes. "It's opened up many more doors for me than I thought possible. I have created strong networks and have connections everywhere. I could have never imagined I could have gone to college with my family background. It's been a complete miracle and blessing and none of this would have been possible without the bursary."

Good luck in your studies, Mercedes!

# 2015 Fund Balances

## Over \$500,000 value

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

## \$20,000 - \$50,000 value

- 2004 BC Seniors Games Legacy Fund
- Bjerkan Family Fund
- Colin & Lois Pritchard Foundation Fund
- COP Centennial Legacy Fund
- Greenwood Forest Products Legacy Fund
- Harman Community Development Fund
- Harold & Donna Schellenberg Legacy Fund
- Harold & Irene Myers Family Fund
- HSBC Fund for Youth
- John Pankiw Family Fund
- Kristi's "Supporting the Dream" Fund
- Lower Similkameen Community Fund

## \$100,000 - \$500,000 value

- 1995 Summer Games Legacy Fund
- Allan P Markin "Whatshan Retreat" Fund
- 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 Art Gallery Legacy Fund
- Penticton Public Library Fund
- Summerland Credit Union Fund
- United Way Tomorrow Fund

## \$10,000 - \$20,000 value

- 100 Women Who Care Fund
- 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
- Hugh & Eva Cleland Fund
- Ina May Scott Fund
- Irvine & Doreen Adams Memorial Fund
- Knights of Pythias - Fund #1
- Lan & Pearl Fruno Legacy Fund
- Meiklejohn Family Fund
- Neil and Shirley Murray Family Fund

## \$50,000 - \$100,000 value

- Harold & Flora Hoey Fund
- Knights of Pythias Lodge #49 - Fund #2
- Okanagan Fest-Of-Ale Legacy Fund
- Oliver Rotary Endowment Fund
- PDCRS Fund
- Ramada Inn Viticulture Fund
- Susan & Thomas Kelly Fund

## Under \$10,000 value

- Alanna Matthew Memorial Fund
- Critteraid Legacy Fund
- CFSOS Directors Legacy Fund
- Drapeau Wealth Management Legacy Fund
- Friends of the Summerland Gardens Fund
- George & Eva Kassa Legacy Fund
- Henderson Family SOPAC Building Fund
- Leonard Futter Fund
- Lynn & Brian Jackson Endowment for Fine Arts
- Magdus & Roy Ornamental Gardens Legacy Fund
- Marjery Punnett Bursary 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 Aboriginal Education Fund
- The Land Conservancy-Okanagan Region Fund
- Tony & Judy Lloyd Family Fund
- Trehearne 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
- Schellenberg Family SOPAC 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

- 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
- SOS Brain Injury Fund
- Toni & Bernie Cattani Legacy Fund for the Arts
- Winkelaar Family Fund
- Wood Family Fund



Ben Amos presents bursary to Alison Braid

## Alison Braid

**Alison Braid has been writing her whole life. The oldest of two children, Alison was always encouraged by her parents and teachers to continue developing her craft. She wrote in school and in her spare time and also attended the BC Youth Writers Camp in Penticton a number of times.**

Alison graduated from Summerland Secondary School in 2012 and immediately moved to start her Bachelor of Fine Arts program at UBC. Now, four years later, Alison is graduating with a Fine Arts degree and is off to Prague to take additional training on how to teach English. "I don't know if it's hit me yet," said Alison, "but it's really exciting."

Alison first got the bug for European living in 2nd year university when she took part in a student exchange program to England. Already fluent in English and French, she hopes to live, work, and write in Europe long term while also learning additional languages along the way.

When asked about pursuing a writing career, Alison said, "I want to write my whole life, but it's difficult to sustain a life, and make a living, by just writing. I'm interested in getting into journalism and creative non-fiction. Eventually I'd like to do an MFA (Masters of Fine Arts) and get into teaching."

In 2015, Alison received a \$1,000 bursary from the Sharon Amos Legacy Fund for the Arts which helped her complete her fourth year of schooling. "I would encourage anyone in the Fine Arts to apply for this bursary," said Alison. "I am so thankful for the generosity of Mr. Amos because he is validating the dream of someone going on to pursue the fine arts as a career and that is very important."

Good luck in Prague, Alison! Be sure to send us a postcard!



# The **yes** Project

**Several years ago, Ms. Rohan Crompton-Bell left a generous bequest to the Community Foundation of the South Okanagan Similkameen (CFSOS) and to the United Way of the Central and South Okanagan (United Way CSO).**

The CFSOS and United Way CSO decided to pool the money together to have a larger and lasting community impact. The CFSOS currently holds the funds and acts as the 'backbone organization'. Ms. Crompton-Bell's wishes were to support Penticton youth in building positive self-esteem. Amy Woodruffe wrote an extensive report outlining issues facing young people living in Penticton; opportunities and resources that build positive self-esteem; and what young people need to feel good about themselves. Woodruffe's research led to the development of the three key pillars of The YES Project. The three key pillars are: to develop a communication strategy, to create more accessible and free youth activities, and to build a youth resource centre.

The YES Project includes a robust Youth Advisory Committee, a Collaborative Partners Table Committee and a Steering Committee. The Youth Advisory Committee includes youth

ranging from 12 to 24 who are interested in making a positive change for Penticton youth and themselves. The YES Project highly values youth engagement and the wealth of knowledge and expertise youth have about their own experiences and the needs of their peers.

In addition to a Project Coordinator, The YES Project also created a Youth Engagement Worker (YEW) position to support youth outside of traditional office hours and via social media. This position is contracted through the Penticton and District Community Resources Society (PDCRS).

Over the past year The YES Project had some great successes and many learning opportunities. The YES Project hosted numerous events, awareness campaigns, activities and meetings throughout the year. The end goal of The YES Project is to build a youth resource centre in Penticton. The top three amenities and resources that local youth identified as their priorities for a youth centre are: emergency beds, mental health and counselling support and basic needs.

The YES Project gives Penticton Youth **#Avoic4once**

Project Coordinator: **Amberlee Erdmann**  
Youth Engagement Worker: **Melissa Redfern**

## YES Project Community Partners List

- ARC Programs
- British Columbia Schizophrenia Society
- Canadian Mental Health Association
- City of Penticton Recreation and RADAR
- Community Foundation of the South Okanagan Similkameen
- Incredible Edibles
- Interior Health
- Ministry of Child and Family Development
- Okanagan Boys and Girls Club
- Okanagan Nation Emergency Transition House
- Oonakane Friendship Centre
- Options for Sexual Health
- Pathways Addictions Resource Centre
- Penticton and Area Access Society
- Penticton and District Community Resource Society
- Penticton Public Library
- School District 67
- SOS Division of Family Practice
- South Okanagan Immigrant Community Services
- South Okanagan Restorative Justice Program
- South Okanagan Similkameen Brain Injury Society
- South Okanagan Victim Assistance Society
- South Okanagan Women in Need Society
- United Way of the Central and South Okanagan / Similkameen
- YMCA Okanagan





## 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.



Legacy Club members Lynn & Brian Jackson

## JUST IN CASE Planning Guides

**Have you ever thought about the way you organize your files? You have a system (right?) that works for you, but could your family or your executor understand your system if something happened to you?**

Getting organized is a daunting process, but, for the sake of your family, it's a very important thing to do. Your family will be in mourning when you pass and the last thing they need to worry about is how to pay "that bill" or what to do with "the monkey tree that's been in the family for 50 years".

The JUST IN CASE Planning guide helps you manage the process of organizing your life. Offered for sale in conjunction with a free seminar, this guide saves you time by providing a proven organizational structure that you can use without having to reinvent the wheel.

For more information on upcoming seminars, or to purchase a planning guide, 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.

# How You Can Get Involved

The Community Foundation does many different things to build stronger, smarter, healthier, and more caring communities. We have more than doubled our annual granting to the community and have quadrupled the number of programs we offer to support community need. But, we know we can't do it alone.

**"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has."**

**- Margaret Mead**

So how can you get involved and work with us to build a better world? There are so many ways!

- Donate to an existing community fund
- Set up your own endowment fund
- Join the Legacy Club
- Join 100 Men Who Care
- Join 100 Women Who Care
- Participate in Random Act of Kindness Day
- Attend a Just in Case Planning seminar to learn how to properly structure your estate plans
- Use the Community Knowledge Centre to research the charities most suitable for your philanthropic goals
- Volunteer to help build the official community fund for your community
- Support Penticton's youth through the YES Project

For more information on our various programs or how we can help you achieve your giving goals, please call our office at **250-493-9311**.





# Legacy Club Membership Form



**Legacy Club Members are a special group of citizens who share a vision and a passion for the future of our communities.**

While each Member may have a different cause that is close to their heart, the ultimate goal is always to make your community a better place to live.

With a Legacy Gift to the Community Foundation, you can feel confident that your vision for the future will be honoured, that your values will be respected, and that your cause will be supported.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

☐ I have already named the Community Foundation in my

☐ Will

☐ RRIF

☐ Life Insurance Policy

☐ Family Trust

☐ I would like more information about how to include the Community Foundation in my estate planning.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please return to:

**Community Foundation of the South Okanagan | Similkameen**

390 Main St., 2nd Floor  
Penticton BC, V2A 5C3

info@cfso.net



## 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.

Community Foundation of the South Okanagan | Similkameen  
390 Main Street, Penticton, BC V2A 5C3  
250-493-9311 | 866-493-9311  
[www.cfso.net](http://www.cfso.net)