



south okanagan | similkameen

A MESSAGE FROM THE PRESIDENT



Marielle Brule President

As chair of the board of the Community Foundation, I wish to congratulate our staff, board and volunteers on some significant milestones in the 25th year of the Foundation. We have worked towards our goal of building healthy and vibrant communities in our region and this has stretched our capacity as

well as our ability to envision the future. Together we explored the potential for changes "at home" by learning about how others across Canada approach the unique issues facing them. This has inspired us to think big and believe that as a philanthropic leader we can be a catalyst for change in the communities we serve.

I am proud of our community partners who have joined us in this journey. There is no one answer to the challenges we face, so it takes all of us working together to build a community that thrives. I am privileged to be in a position to see business owners, community leaders and grass roots citizens so deeply committed to their community and taking part in initiatives like:

- Several hundred men and women choosing to give on a quarterly basis and learn about the needs from local charities.
- The city supporting a major community initiative by exploring options of gifting for a Youth Centre.
- Donors making choices to support areas of need in the community.
- The 27 community groups coming together to make a dream of a youth centre much closer to reality.
- Rotary members stepping up to donate to the YES project.
- Youth fundraising to help each other for the betterment of all.
- Neighbours choosing to apply for a grant to share their time and energy together.

- Volunteers coming together to steward the decisions of the YES program.
- 31 community volunteers guiding the granting to worthy charities in Summerland, the Lower Similkameen, Penticton, Princeton, Oliver, and Osoyoos, to ensure local choices for local needs.

"Community" has a very broad and inclusive meaning to me – it is small groups with things in common; it is folks with similar talents; it is a feeling of wanting to belong; it is who we are as members of our towns. Because of the commitment of each of you, we continue to deepen our knowledge and engage our citizens in making our communities thrive.

BOARD MEMBERS



Patrick Bell



David Braumberger



Marielle Brule - President



Heather Glynes



Bruce Hallquist



Tom Kampman



J.P. Kaumeyer - Treasurer



Susan Kelly - Past President



Mathew Kenyon



Graham Lyle



Kim Lyster- Vice President



Robin Robertson

STAFF



Aaron McRann Executive Director



Kelly Helfrich Administrator



Kim English
Regional Development Officer



Sarah Trudeau - Manager Grants & Community Initiatives



THE LEADING EDGE OF COMMUNITY IMPACT

Canada's first community foundation was the Winnipeg Foundation, created in 1921. The oldest community foundation in the world is the Cleveland Foundation, founded in 1914. In the 104 years since the community philanthropy model was created the core business of community foundations remains largely unchanged:

- We help donors increase their impact by pooling their donations.
- We ensure a legacy impact by preserving the original donation.
- We invest donor gifts and make grants to charities from investment income.

That model has been remarkably successful. The Community Foundation of the South Okanagan | Similkameen has granted \$3.9 million since 1991 and currently manages in excess of \$10 million. Nationally, the 191 community foundations in Canada grant more than \$266 million per year to local charities and manage more than \$5.4 billion in assets.

This business model has been massively successful for our communities, but there is more we can do. The new Penticton Youth Centre is an example of how we can "double our impact" with strategic community investments.

Sparked by a bequest from the estate of Rohan Crompton-Bell, the new Youth Centre is one of the three pillars of the Youth Engagement Strategy (YES) Project, a four year-old program of the Foundation. The initial bequest of \$180,000 has been pooled with other gifts to purchase a 21,000 square foot building at 501 Main Street, with more than \$1 million raised to date.

The youth centre building will become home to Foundry Penticton (www.foundrybc.ca), housed in 6,000 square feet on the first floor. The 2nd floor will be occupied by ARC Programs, YMCA, and the Ministry of Children and Family Development. The basement will remain empty in the short term in order to allow for expansion of programs.

The social benefits of investing in this building:

- Providing youth-serving agencies with a central location for collaborating and working together will improve outcomes for youth in need.
- Providing youth and their families with a single location to access care will simplify and streamline the service they receive.
- Providing young people with a space for healthy events, activities and social interactions will help them feel more connected with each other and the community.

The financial benefits of owning 501 Main Street:

- The building is self-sustaining with rental income.
- Upon completion of the \$3 million fundraising campaign, the building will generate approximately \$150,000 in net income. This income, like the rest of our investment income, will be used for granting to local charities.

The Board of the Foundation is proud of this significant milestone and the opportunity to create both financial and social benefit by working with many community partners and donors. 501 Main Street will create a legacy of collaboration, caring support, sustainable youth programming, and significant annual granting.

The Community Foundation of the South Okanagan | Similkameen has become the first community foundation in Canada to own a community asset purely for community good.





2017 FINANCIAL STATEMENTS

Summarized Balance Sheet as at December 31, 2017

with comparative information for 2016

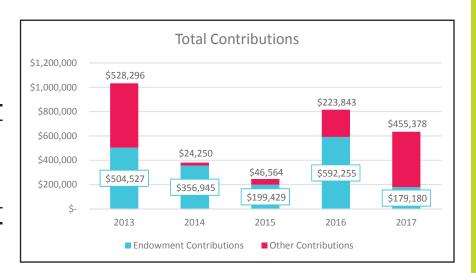
	2017	2016
Cash and cash equivalents	111,073	105,207
Restricted cash and cash equivalents	599,977	778,700
Goods and services tax recoverable	2,436	2,636
Investments, measured at fair value	9,565,246	9,228,561
Tangible capital assets	1,347	1,989
Deposits and prepaid expenses	306,222	5,956
Total assets	10,586,301	10,123,049

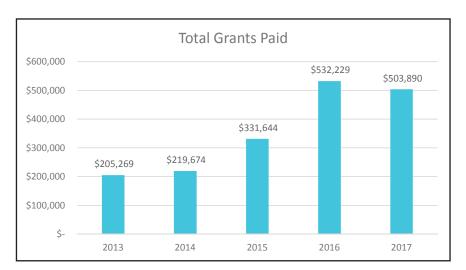
Accounts payable and accrued liabilities	21,493	17,522
Total liabilities	21,493	17,522
Net assets:		
Invested in tangible capital assets	1,347	1,989
Unrestricted	105,946	127,018
Endowments	8,010,062	7,900,493
Retained returns from investments	1,496,603	1,421,063
Other restricted	950,850	654,964
Total net assets	10,564,808	10,105,527
Total liabilities and net assets	10,586,301	10,123,049

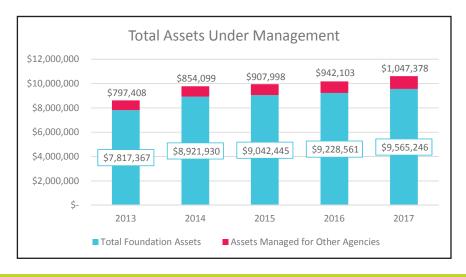
Summarized Statement of Operations for the year-ended December 31, 2017 with comparative information for 2016

	2017	2016
Investment income	583,603	320,756
Gains on investments	97,248	405,245
Less: investment management fees	(55,736)	(53,096)
Gifts for long term granting	179,180	592,255
Flow through gifts	455,378	223,843
Other income	220,979	168,017
Total income	1,480,652	1,657,020
Cracks noid	502.000	F22 220
Grants paid	503,890	532,229
Administrative expenses	374,304	251,599
Fundraising expenses	43,177	40,699
Reclassification of endowment funds	100,000	
Total expenses	1,021,371	824,527
Excess of revenue over expenses	459,281	832,493

*Audited Financial Statements were provided by KPMG







Foundation Highlights

Since 2009, when the Foundation hired its first full time employee,

- Foundation assets have grown by \$6 million;
- Annual granting has increased by \$300,000 per year;
- Total granting in our history has grown from \$1.5 million to more than \$4.2 million.





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AGENCY GRANTS

- Friends of the Summerland Gardens
- NK'MIP Desert Heritage Society
- Okanagan Boys & Girls Clubs
- Okanagan College Foundation
- Okanagan Symphony Society -Penticton Branch
- Penticton & District Community Arts Council
- Penticton & District Community Resources Society
- Penticton Art Gallery
- Penticton Public Library
- South Okanagan Secondary School
- South Okanagan Similkameen Mental Wellness Society
- South Okanagan Women in Need
- The Land Conservancy
 Okanagan Region
- United Way of the Central Okanagan Similkameen

DESIGNATED GRANTS

- AlleyCats Alliance Society
- Canadian Freestyle Ski Association
- Doukhobor Heritage Retreat Society
- Friends of the Summerland Gardens
- Island Mountain Arts
- Kiwanis Music Festival
- Knights of Pythias
- MS Society
- Okanagan College Foundation
- Okanagan Nation Family Intervention and Services Society
- Okanagan Parks Society
- Okanagan School of the Arts
- Okanagan Symphony Society
- Penticton Academy of Music
- Penticton Public LibraryPenticton Secondary School
- Penticton Secondary Schools Bursary
- Committee "Penticton Community Concerts Scholarship"
- School District No. 53 Okanagan Similkameen
- School District No. 53 Okanagan

- Similkameen for South Okanagan Secondary School
- School District No. 58 Nicola
- Similkameen for Princeton Secondary School Bursary
- School District No. 67 Okanagan Skaha - split between Princess Margaret and Penticton Secondary Schools
- South Okanagan Similkameen Medical Foundation
- South Okanagan Women in Need
- Town of Osoyoos Pioneer Walkway
- UBC Okanagan
- YES Project

DONOR ADVISED GRANTS

- Agur Lake
- Alzheimer Society of British Columbia
- Civilian Sponsoring Committee for 232 Bighorn Squadron RCAC
- Dragonfly Pond
- Nature Conservancy of Canada -Southern Interior Region
- Nickel Plate Nordic Centre
- Okanagan Boys & Girls Clubs
- Okanagan Similkameen Conservation Alliance - Meadowlark Festival
- Oliver & District Heritage Society
- OSNS
- School District No. 67 Okanagan Skaha
- School District No. 67 Okanagan
- Skaha for Columbia Elementary Breakfast Program
- School District No. 67 Okanagan Skaha for Summerland Royalty Pageant
- South Okanagan Rehabilitation Centre for Owls
- South Okanagan Similkameen Conservation Program
- South Okanagan Similkameen Mental Wellness Society

- South Okanagan Women in Need
- YES Project

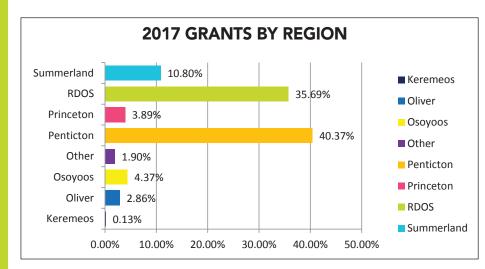
RESPONSIVE GRANTS

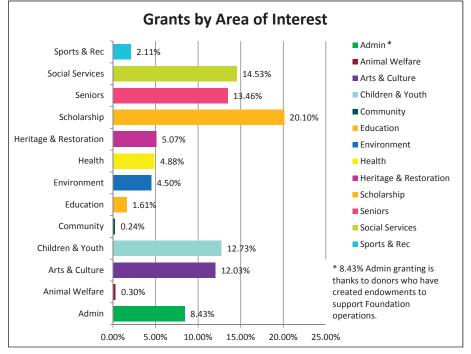
- Accessible Okanagan
- Canadian Red Cross
- Dragonfly Pond
- Erris Volunteer Fire Assoc
- FarmFolk, CityFolk
- Okanagan Boys & Girls Clubs
- Okanagan College Foundation
- Okanagan Falls Seniors Centre
- Okanagan Historical Society
- Okanagan School of the Arts
- Ooknakane Friendship Centre
- OSNS
- Osoyoos Desert Society
- Pathways Addiction Resource Society Penticton & Area Access
- Penticton & District Community Resources Society
- Penticton Recovery Resource Centre
- Princeton Family Resources Society
- Princeton Seniors Drop In Centre
- School District No. 53 Okanagan Similkameen for Cawston Primary School PAC
- School District No. 53 Okanagan Similkameen for Tuc El Nuit PAC
- School District No. 67 Okanagan Skaha for Giant's Head Elementary Breakfast Program
- School District No. 67 Okanagan Skaha for Okanagan Falls Elementary PAC
- Sing for Your Life
- South Okanagan Seniors Wellness Society
- South Okanagan Women in Need

- SS Sicamous Marine Heritage Society
- Summerland Asset Development
 Initiative
- Summerland Community Arts Council
- Summerland Food Bank
- The Arthritis Society
- YMCA

BURSARIES

- Amaya Black
- Brenna Hannon
- Canadian College of Performing Arts
- Krista-Marie Goss
- Grant MacEwan University
- Madison Terbasket Winser
- Kiara Felts
- MAIWA Bethany Handfield
- Okanagan College Laura Doherty
- Okanagan College
- Meghan Vetsch
- Okanagan College Melissa Kruger
- Okanagan College Morgan Grigg
- Okanagan School of the Arts
 Bethany Handfield
- Olds College Sasha Mandaione
- Simon Fraser University
- Emma ThomsonThompson Rivers University
- Josh Pozzobon
- University of British Columbia
- (Okanagan) Carson Stocker
- University of British Columbia
- (Okanagan) Emily Bowen
- University of Victoria Lyndzie CaronWynn Nordlund





Congratulations to the Community Foundation South Okanagan Similkameen

on their 2017 Annual Report. Local people have supported their Community Foundation for 26 years creating funds for bursaries, charities, community events and so much more.

Richard Cannings Member of Parliament South Okanagan-West Kootenay Contact: 250-770-4480 Richard.cannings.c1@parl.gc.ca 202-301 Main Street Penticton, BC V2A 5B7





2017 FUND BALANCES

Under \$10,000

Alanna Matthew Memorial Fund B2B Fund Crompton Bell Endowment Fund Directors Legacy Fund Drapeau Wealth Management Legacy Fund Friends of the Gardens Fund Henderson Family SOPAC Building Fund Leonard Futter Fund Magdus & Roy Ornamental Gardens Legacy Fund Margaret Neuhaus 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 Penticton Public Art Fund SOS Brain Injury Fund

Toni & Bernie Cattani Legacy Fund for the Arts

\$10,000 - \$20,000

Winkelaar Family Fund

Wood Family Fund

100 Men Penticton Legacy Fund 100 Women Who Care Fund 1996 BC Festival of the Arts Fund BC Schizophrenia Society - Penticton Fund Canadian Federation of University Women Fund Charlotte Campbell Memorial Fund Children's Trust Fund Critteraid Legacy Fund Edith Forster Legacy Fund Frances Harris Fund Francis & Marion Kanuit Fund George & Eva Kassa Legacy Fund Hugh & Eva Cleland Fund Ina May Scott Fund Irvine & Doreen Adams Memorial Fund Kampman Family Fund Knights of Pythias - Fund #1 L&R Supplementary Bursary Fund Lan & Pearl Fruno Legacy Fund Lynn & Brian Jackson Endowment for Fine Arts Meiklejohn Family Fund Oliver & District Heritage Society Fund Oliver Community Fund Osoyoos Community Fund Pat Clarke Memorial Bursary Fund

Penticton & District Community Arts Council Fund

Penticton Women In Business Fund
Philip Locke Penticton & District Building 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 Research & Capacity Building
Endowment Fund
South Okanagan Women in Need Agency Fund
Summerland Community Fund
Summerland Ornamental Gardens Sustaining Fund
Thea Haubrich Legacy Fund

\$20,000 - \$50,000

2004 BC Seniors Games Legacy Fund

Irene and Charles Bursary Fund Bjerkan Family Fund Brule Windeler Legacy Fund Colin & Lois Pritchard Foundation Fund COP Centennial Legacy Fund Culver Family Bursary Fund Greenwood Forest Products Legacy Harman Community Development Fund Harold & Donna Schellenberg Legacy Fund **HSBC** Fund for Youth John Pankiw Family Fund Kristi's "Supporting the Dream" Fund Lower Similkameen Community Fund MS Anonymous Fund Neil and Shirley Murray Family Fund Okanagan Similkameen Concert Society Fund Patricia & Murray Craig Memorial Endowment Fund Penticton Auto Dealers Fund Penticton Oldtimers Hockey Club Legacy 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 Trehearne Family Fund

\$50,000 - \$100,000

Harold & Flora Hoey Fund Knights of Pythias Lodge #49 Fund 2 Oliver Rotary Endowment Fund PDCRS Fund Ramada Inn Viticulture Fund Susan & Thomas Kelly Fund Tony & Judy Lloyd Family Fund

\$100,000 - \$500,000

1995 Summer Games Legacy

Barbara Pearce Summerland Community Fund Bob & Frances Garland Fund **Business Gives Back Fund** Environmental Legacy Fund Erwin & Lilli Schneider Memorial Fund Harold & Irene Myers Family Fund John & Doreen Wisenden Fund MacFarlane Fund NK'MIP Desert Cultural Centre Legacy Fund Okanagan College Endowment Fund Okanagan Fest-Of-Ale Legacy 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

Over \$500,000

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

117 Endowment Funds

Administrative Funds	6
Agency Funds	18
Community Funds	6
Designated Funds	39
Donor Advised	17
Field of Interest (Discretionary)	29
Term Endowment	2



NEIGHBOURHOOD SMALL GRANTS

In 2017 twenty-four applications from folks across the South Okanagan and Similkameen were awarded a Neighbourhood Small Grant of up to \$500 to build connections and belonging right on the street where they live.

idea behind The Neighbourhood Small Grants program is to inspire residents who have small but powerful ideas to bring people together and build community. This year, each event was unique, ranging from gatherings of 25 to over 100 people. Each event had lots of different elements, like face painting, live music, and all ages contests and hands-on projects. Events included gatherings: street and beach "meet & greets" or "parties with a purpose"; some shared their skills with gardening & foodie workshops. Other's showed their neighbours how to build and install bluebird nesting boxes; while some folks choose to do beautification or cleanup projects in their alley's and common greenspaces and habitat restoration, including the removal of invasive species and replanting. Finally, others celebrated the diversity in their community by culture sharing with a Taiko drumming workshop, feast, and concert.

NSG event highlight: Kaleden Banner Project

In the community of Kaleden, neighbours applied their NSG award toward a day of outdoor activities, including painting banners to commemorate the day. The event took place during a hot afternoon in August at the beach, and the setting where many families who had never met were introduced to each other. By planning an event where all ages and abilities can participate, a banner project was a nice fit for the community.

Neighbours took great interest in each other's banners, offered suggestions, shared paint, and volunteered to help each other. "Expert" volunteers came from the Summerland Art Centre to share their knowledge. resources and equipment, such as stretchers and brushes. Local artists in the community helped other participants who were more hesitant in mixing paints or applying it to their banners. Participants became comfortable with the activities and felt 'freer' in expressing themselves and this showed in the banners that will be hung this spring throughout the community.

People laughed, took risks, worked together, held one another's



banners taut to apply paint and generally had a great time and were amazed at what they created. A senior buddy created a banner with her school aged buddy from the Seniors and Kids program. One neighbour with Parkinson's Disease had helping hands from other participants who helped her paint her banner so that the banner was her creation. "By far the most memorable experience was watching the children and parents complete their banners,

witnessing the joy they took, the conversations that happened among and across the families, most memorably between the 5-year-old and his mother and the senior buddy and the school-aged child" noted one of the project leaders.

"I now know a much broader range of people in the community. Kids from the local school stop me on the street to say hi; parents wave when they drive by or still comment to me at other community events about how much they enjoyed the experience, and can't wait for the banners to be hung. I would say everyone who participated now knows people they didn't know before because people from all over the community participated in the event."

Who knew there was so much local talent tucked away in the little community of Kaleden?

How do you inspire community and belonging in your neighbourhood?

Okanagan College Daycare Centre

In 2017, the Community Foundation of the South Okanagan Similkameen granted just over \$7,000 to the Okanagan College Foundation to help fund the outdoor play area for their onsite daycare, which opened this past September. The Little Learners Academy is operated through the OneSky Community Resources, formerly the Penticton and District Community Resources Society.

The outdoor play areas are currently equipped with grass, toys and play equipment. A comprehensive plan for outdoor play and landscaping will incorporate research findings to enhance the early childhood learning experience.

Registration is open to families in the South Okanagan, including College students and employees. Approximately 25 percent of current families enrolled have a formal connection to Okanagan College - 7 students (3 of which are full time) and 2 staff.

The Community Foundation's Grant Committee reviewed more than 80 applications and this project was near the top of the list," said Aaron McRann, Executive Director of the Community Foundation.

"It resonated because everyone in the region is affected directly or indirectly by the challenges of finding child care and understands the need for quality early childhood education."

"The significance of the new centre goes beyond the boundaries of our campus and will benefit the community and economy," explains Kathy Butler, Executive Director of the Okanagan College Foundation.



"Having a daycare onsite at the College goes beyond just childcare it allows parents to enter or stay in the workforce or focus on their own education," added Butler.

The project also involved students in the Residential Construction and Women in Trades Gateway Programs that were involved in building sheds, mud kitchens, and shelters associated with the outdoor play areas.

Edith Forster Legacy Fund

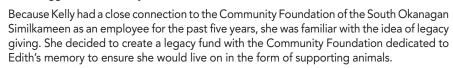
Kelly and her mother, Edith, both had a love of animals and particularly, cats.

Kelly always had cats when she was growing up and they often took in stray cats. When Edith passed away in 2017, Kelly knew she wanted to find a way to remember her mother but in a manner that gave back to a cause close to both of their hearts.

Once she settled the estate, it did not seem right that not only was her mother gone but also it felt like she would only live on in Kelly's memories.

would only live on in Kelly's memories.

She struggled to find a way to commemorate the memories of her beloved mother.



The Edith Forster Legacy Fund is a designated fund meaning that Kelly has given the Foundation direction to take the income earned on her fund and disburse it to local organizations that support animals.

Kelly liked the idea that the fund she set up in her mom's name would be supporting animals and she didn't have the burden of having to decide where the money went, it was predesignated in her contract which organizations she chose to support. Donors can have as much or as little interaction with their fund and as a donor, each year Kelly will receive a report on how much her fund dispersed and the amount that went to the charities she chose

Losing a parent is a difficult and emotional process and finding a way to keep their memory alive is even more difficult. For some, supporting a cause that commemorates a person keeps their memory alive.

The Edith Forster Legacy Fund accepts donations on the CFSOS website, meaning any of Edith's family or friends can donate to the fund if they wish.



SOCIAL GIVING



Some of the 100 Women members at a quarterly event held in June of 2017.



Two of the 100 Men Who Care committee stand with the three recipient charities from a past event.

100 WOMEN Who Care

Check out: www.100womensouthokanagan.com

In 2013 a group of local women gathered to learn about the 100 Women Who Care concept- pooling their donations together to make a bigger impact to their community. Although group giving is not a new concept it was something new to the Foundation. It has been incredibly successful and they continue to increase their membership each year.

- 150 members and growing!
- Donated over \$60,000 since 2014
- Given to over 25 local charities
- Meet 4 times a year
- Donate \$50 per quarter
- All donations receive a tax receipt

100MENS

Check out: www.100menpenticton.com

The 100 Men Who Care Penticton have 110 members and have donated over \$43,000 to 21 local organizations.

- Over 100 members and growing!
- Donated over \$43,000
- Given to over 20 local charities
- Meet 4 times a year
- Donate \$100 per quarter
- All donations receive a tax receipt

Give Where You Live

Whether you live in Osoyoos, Oliver, Penticton, Summerland, the Lower Similkameen, or in the Princeton region, you can give directly to your community's own Community Fund. **Give Where You Live,** means your donation stays right in your community, and local non-profits can continue to fulfil their mission while improving our quality of life. We know you love your community, and you can help make a big difference right where you live.

The community funds are affiliate funds of CFSOS, and like other endowment funds, your donation is 100% permanently invested. The income generated by the capital flows back to the community in the form of grants eligible charities and activities; donations provide lasting support for local needs and priorities that you care about.

Since the establishment of the community funds in 2013, they have grown by the generosity of it's past and present citizens. Many have already given back to the community where they've lived, worked, raised their family, and played. People want to be a part of strengthening their community.

In 2017, donors who gave directly to their Community Fund saw their generosity turn into real impact. Donations to the Oliver Fund supported Tuc-el-Nuit Elementary School. The grant helped expand the school's breakfast and lunch program. "Making sure all students have bellies full of quality, healthy food not only means they'll be able to focus and engage far better during class time, it means they'll be happier and healthier too." Wrote a PAC volunteer.



Okanagan Falls Elementary School PAC received a grant to purchase ukulele's to contribute to the school's music program. This grant was made possible through local community funds that support communities like Okanagan Falls.

The Osoyoos Fund supported the Osoyoos Desert Centre for costs towards the Bluebird Viewing Deck. The viewing deck will benefit the community by enriching the experience for guests to observe the bluebirds and learn what they can do to help bluebird populations. The deck is scheduled to be installed in the spring of 2018. We recommend a visit.

Students from the Cawston Primary School benefited from the Lower Similkameen Fund. The school's PAC

purchased a water bottle re-fill station, "On behalf of the students, we would like to thank the Lower Similkameen Community Fund for their financial support in making our school a little bit healthier and kids will go the extra few meters to fill their water bottles from that fountain. Kids love it!"

We encourage you to give directly to your local Community Fund, and watch your gift grown and give back to the community you love, year after year.