

As charity experts, the
Community Foundation
is all about...

Giving Choices

We offer a wide variety of ways for you to donate and give back to your community!

Funding Change

We help individuals and organizations fund projects, programs and events in your community!



Discover Us!

We've been helping donors and funding projects in the communities of the South Okanagan Similkameen for more than 30 years!

We manage almost \$16 million of donor funds, which are given out to charities and causes people care about year after year.

In 2021, **we gave out more than \$500,000** and since our inception, have directed almost \$7 million to various projects, programs and events, large and small.

Discover the individuals & communities we've supported.

We invite you to learn more and explore how we're helping our communities thrive:

Almost \$1 million in Princeton flood relief • \$40,000+ in bursaries • \$330,000+ to fund community initiatives, projects and programs

- Pandemic support funding • Partnering to develop programs for reconciliation • Purchasing buildings for charities • Incubating new societies • Providing funding for gender equality, youth, healthy community and neighbourhood projects • *And so much more...*

Discover why people give through the Foundation.

"We wanted to give back to our community in a way that would have lasting impact and at the same time further our values by helping to reduce inequality in our region for generations to come. An endowment fund with the Community Foundation to support student education was the perfect fit."

~ Gerry & Sandy Karr

"Setting up an endowment fund with the Community Foundation gives us peace of mind that the causes we believe in will receive support long after we are gone. It is a form of immortality."

~ Peter Hay and Dorthea Atwater

We acknowledge that we live, work, and learn within the ancestral, traditional, and unceded territory of the syilx nation.

Meet the individuals & organizations who have chosen to set up a fund with the Community Foundation!

Thank you to those who have **powered up their donation** by creating or giving to a fund! Some of our donors chose to create a fund in their name, in memory of a loved one, or to support a cause they care about. Still others leave it to us to help fund emerging community needs. *The choices for setting up or giving to a fund are as endless as the imagination!*

Charity/Non-Profit Funds ~provide a reliable stream of funding to their creators

BC Schizophrenia Society - Penticton Fund
Critticaid Legacy Fund
NK'MIP Desert Cultural Centre Legacy Fund
Okanagan Boys & Girls Clubs Fund
Okanagan College Endowment Fund
Okanagan Regional Library Fund
*Okanagan Symphony Society Fund
Okanagan Symphony Society-Penticton Branch Fund
*Okanagan Symphony Youth Orchestra Endowment Fund
Oliver & District Heritage Society Fund
PDCRS Fund
Penticton & District Community Arts Council Fund
Penticton Art Gallery Legacy Fund
Penticton Public Library Fund
SO Secondary School Enrichment Fund
SOS Brain Injury Fund
South Okanagan Women in Need Agency Fund
Summerland Arts Council Fund
Summerland Ornamental Gardens Sustaining Fund
The Land Conservancy-Okanagan Region Fund
United Way Tomorrow Fund

Community Funds ~are collective pools of donations for community programs and activities

*Kaleden Community Fund
Lower Similkameen Community Fund
*Okanagan Falls Community Fund
Oliver Community Fund
Osoyoos Community Fund
Penticton & District Fund
Princeton & District Legacy Fund
Summerland Community Fund

Discretionary Funds ~provide funding to donor-specified causes or fields of interest

1 Penticton Community Fund
100 Women Who Care Fund
1995 Summer Games Legacy
1996 BC Festival of the Arts Fund
2004 BC Seniors Games Legacy Fund
*Alan & Lorna Dawkins Fund
B2B Fund
Barbara Pearce Summerland Community Fund
Children's Trust Fund
Chris Grauer Endowment Fund
City of Penticton Trust Fund
Environmental Legacy Fund
Eva & Herbert Rosinger General Fund
Francis & Marion Kanuit Fund

George & Eva Kassa Legacy Fund
Harman Community Development Fund
Harold & Irene Myers Family Fund
HSBC Fund for Youth
John & Doreen Wisenden Fund
John Pankiw Family Fund
Kampman Family Fund
King Kirkpatrick Endowment Fund
Lan & Pearl Fruno Legacy Fund
Lancey Family Fund
Leonard Futter Fund
Margaret Neuhaus Fund
Meiklejohn Family Fund
Milton Orris Legacy Fund
MS Anonymous Fund
Penticton Public Art Fund
Philip Locke Penticton & District Building Fund
Rita Fawcett Memorial Fund
Rotary Club of Penticton Legacy Fund
School Breakfast Program Fund
Summerland Credit Union Fund
Wood Family Fund

Donor Advised Funds

~allow donors to decide where to direct funds on an annual basis

100 Men Penticton Legacy Fund
Barbara Macdonald Family Fund
Bjerkan Family Fund
Business Gives Back Fund
Debbie Nelson Fund
Drapeau Wealth Management Legacy Fund
Greenwood Forest Products Legacy
Knights of Pythias Lodge #49 Fund 2
Neil and Shirley Murray Family Fund
Okanagan Fest-Of-Ale Legacy Fund
Oliver Rotary Endowment Fund
Penny Lane Community Legacy Fund
Penticton Auto Dealers Fund
Penticton Oldtimers Hockey Club Legacy Fund
Ron Bell & Family Fund
Sharon Amos Legacy Fund for the Arts
SOSCP Legacy Fund
Stoof/Straatsma Family Fund
Summerland Credit Union Legacy Fund
Susan & Thomas Kelly Fund
Tony & Judy Lloyd Family Fund

Donor Designated Funds ~allow donors to direct funds to a specific organization

Alanna Matthew Memorial Fund
Bob & Frances Garland Fund
Brule Windeler Legacy Fund

Canadian Federation of University Women Fund
Colin & Lois Pritchard Foundation Fund
COP Centennial Legacy Fund
Culver Family Bursary Fund
*Dorthea Atwater and Peter Hay Endowment Fund
Dr. John and Kathy Scarfo Fund
Edith Forster Legacy Fund
Eva & Herbert Rosinger Scholarship Fund
Frances Harris Fund
Friends of the Gardens Fund
Harold & Donna Schellenberg Legacy Fund
Harold & Flora Hoey Fund
House Endowment Fund
Hugh & Eva Cleland Fund
Irene & Charles Armstrong Bursary Fund
Irvine & Doreen Adams Memorial Fund
*John Sloane Brain Injury Legacy Fund
Kaleden Bursary Fund
Katie Lynn Apgar-Knezacek Fund
Knights of Pythias - Fund #1
Kristi's "Supporting the Dream" Fund
L&R Supplementary Bursary 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 Nation Women's Emergency Fund
Okanagan Similkameen Concert Society Fund
Pat Clarke Memorial Bursary Fund
Patricia & Murray Craig Memorial Endowment Fund
Penticton Women In Business Fund
Ramada Inn Viticulture Fund
Richard & Rose Cooper Fund
Ryga Festival Society Fund
Scott & Helen Perry Bursary Fund
SO Boundary Labour Council Fund
South Okanagan Aboriginal Education Fund
South Okanagan Research & Capacity Building Endowment Fund
SS Sicamous Marine Heritage Fund
Thea Haubrich Legacy Fund
Toni & Bernie Cattani Legacy Fund for the Arts
Trehearne Family Fund
Weyerhaeuser Legacy Fund
Winkelaar Family Fund

Term Endowment ~are long term funds with definite closing dates

Henderson Family SOPAC Building Fund
Schellenberg Family SOPAC Fund

* = new fund opened in 2021



Sue and Tom Kelly donated to the Kaleden Fund

Kaleden and Okanagan Falls: Funding for Community by Community

In 2021, Kaleden residents Sue and Tom Kelly donated \$100,000 to the newly-developed Kaleden Community Fund – the largest donation ever given to a local fund of this kind. “There’s so many great ideas for Kaleden to make it better,” says Sue of their decision to give. “When people contribute to the fund, it makes the annual income grow and grow, and it will all be spent on this community. It’s a great way for us to preserve what is near and dear to our heart.”

“We are thankful to work with passionate and generous citizens in each of these communities,” says Kim English, the Foundation’s Community Development Officer. “And special congratulations to both Kaleden and Okanagan Falls on the Funds they started in 2021.”

The Foundation is proud to administer seven community funds across the region – in Kaleden, Lower Similkameen, Okanagan Falls, Oliver, Osoyoos, Princeton and District, and Summerland.

Giving Choices to donors to help their community

Donor thrilled to visit charity he helps fund

While some people come to the Foundation with a clear idea of a charity they’d like to support, many others like Carl Peterson, enjoy discovering a meaningful cause together with us.

In Carl’s case, he met with Grants Manager Sarah Trudeau to chat about issues close to his heart, and about giving options that would maximize impact. He chose to donate in two ways: Carl set up a donor-advised fund, meaning that every year, he will work with the Foundation to choose

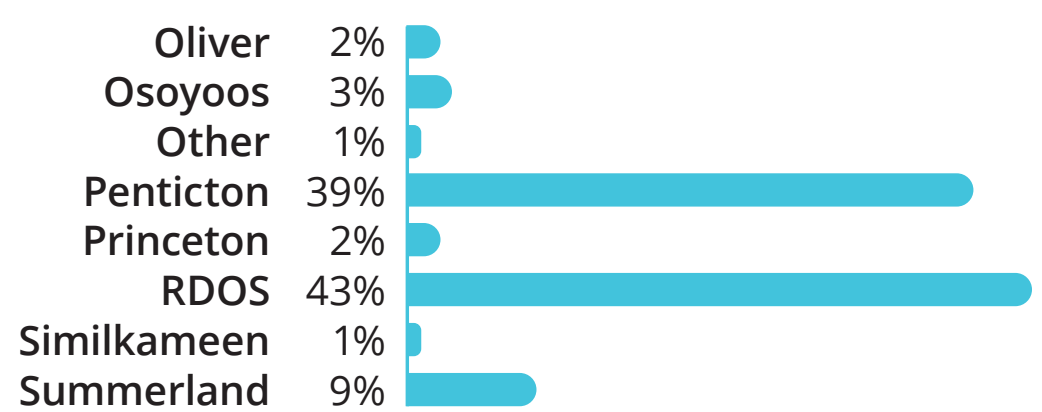
a charity to support. Carl also chose to donate directly to Mamas for Mamas South Okanagan, a local charity that supports single parents and young children.

With a tour of Mamas for Mamas, Carl was thrilled to see what a big impact his donation would have for the organization. “His donation of \$7,000 will double our buying power for things like infant supplies,” says Crystal Boros, Mamas for Mamas volunteer. “We’re incredibly grateful to have made this connection.”



Crystal Boros of Mamas for Mamas meets donor Carl Peterson on location

Grants by Charity Region



Discover what’s needed in your community!

Check out our online **Vital Signs Report**, which provides a snapshot of our communities from Summerland, down to Osoyoos and over to Princeton — providing data and information on everything from health to the environment and much more. This easy-to-use online tool has an impact! In fact, data from this report highlighted a need for more youth mental health supports, helping to kickstart one of our most successful community campaigns and partnerships: the planning, funding and opening of the Foundry Youth Centre in Penticton.

www.cfso.net/vital-signs

Meet the people & organizations that we helped to fund this year!

Agency Grants

BC Schizophrenia Society - Penticton Fund
 NK'MIP Desert Cultural Centre Legacy Fund
 Okanagan Boys & Girls Clubs Fund
 Okanagan College Endowment Fund
 Okanagan Symphony Society-Penticton Branch Fund
 Oliver & District Heritage Society Fund
 PDCRS Fund
 Penticton & District Community Arts Council Fund
 Penticton Art Gallery Legacy Fund
 Penticton Public Library Fund
 SO Secondary School Enrichment Fund
 South Okanagan Women in Need Agency Fund
 Summerland Ornamental Gardens Sustaining Fund
 The Land Conservancy-Okanagan Region Fund
 United Way Tomorrow Fund

Designated Grants

AlleyCats Alliance Society
 BC SPCA South Okanagan Similkameen Branch
 Canadian Freestyle Ski Association
 Critteraid
 Friends of the Summerland Research Station Gardens
 Island Mountain Arts Society
 Knights of Pythias Annual Appeal
 Multiple Sclerosis Society - BC & Yukon Division
 Okanagan College Foundation
 Okanagan Nation Family Intervention and Services Society
 Okanagan School of the Arts
 Okanagan Similkameen Parks Society
 Okanagan Symphony Society - Kelowna
 Penticton Academy of Music
 Penticton Community Soupateria Society
 Penticton Kiwanis Music Festival
 Penticton Public Library
 Penticton Secondary Schools Bursary Committee
 Penticton Secondary Schools Bursary Committee "Penticton Community Concerts Scholarship"
 Pythian Cerebral Palsy Committee

Salvation Army Food Bank
 School District No. 53 - Okanagan Similkameen for the "Music Under the K" Bursary
 School District No. 53 - Okanagan Similkameen for the "Pat Clarke Memorial Bursary"
 School District No. 58 - Nicola Similkameen for Princeton Secondary School Bursary
 South Okanagan Similkameen Medical Foundation
 Town of Osoyoos - Pioneer Walkway
 UBC Okanagan for the "Frances Harris Fine Arts Scholarship"

Donor Advised Grants

Agur Lake Camp
 Alzheimer Society of BC
 Animal Lifeline Emergency Response Team (ALERT)
 Canadian Council of the Blind - South Okanagan Chapter
 Dragonfly Pond Family Society
 Meals on Wheels / Penticton Breakfast Program
 Okanagan Boys & Girls Clubs
 Oliver Rotary Park Improvement Fund
 OSNS Child & Youth Development Centre
 Regional District of the Okanagan Similkameen School District No. 67 (Okanagan Skaha)
 South Okanagan Rehabilitation Centre for Owls
 South Okanagan Secondary School
 South Okanagan Similkameen Medical Foundation
 South Okanagan Women in Need Society

Discretionary Grants

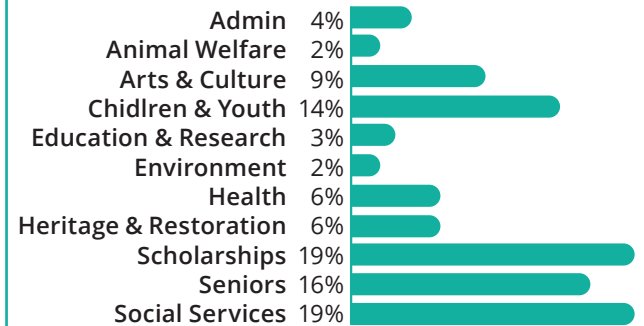
AlleyCats Alliance Society
 Cawston Primary School PAC
 Desert Valley Hospice Society
 Dragonfly Pond
 Lower Similkameen Community Services
 Okanagan Falls Heritage & Museum Society
 Okanagan Falls Music in the Park
 Okanagan Tree Fruit Project
 Oliver and District Heritage Society
 Penticton & Area Access Centre
 Penticton & District Community Arts Council

Penticton Art Gallery
 Penticton Recovery Resource Society
 Penticton Secondary School Lunch Program
 Princess Margaret School Foods/Cafeteria
 Summerland Food Bank & Resource Centre
 Summerland Museum and Archives Society
 Summerland Secondary Food Program
 The Canadian Red Cross Society, South Okanagan HELP Service
 The Okanagan Indian Educational Resources Society
 Vermillion Forks Elementary

Bursaries

Capilano University - Zoe Mallach
 Jessica ter Wolbeek
 Mare McGoran
 Okanagan College - Matt Thacker
 Redeemer University - Holly Atkinson
 Sofia Terbasket-Funmaker
 Thompson Rivers University - Matthew Olsen
 University of British Columbia - Liam Rowan
 University of British Columbia - Okanagan - Coral Ruttan
 University of British Columbia - Okanagan - Sydney Hanson
 University of Lethbridge - Jamison Foster
 University of Northern BC - Abigail Winstone
 Zoe Mallach

2021 Grants by Field of Interest



All in the neighbourhood!

Neighbours all across our region came together to host block parties, create art, hold dance classes, watch outdoor movies, stargaze, build a little library, get fire smart and bear aware, build trails and gardens, and so much more, all thanks to a grassroots program called Neighbourhood Small Grants. In fact, **more than 60 households grew an idea**, applied and received between

\$100-\$500 to host covid-friendly events, and make their neighbourhoods even better places to live!

In partnership with the Vancouver Foundation, the City of Penticton and delivered through local government and the RDOS, **more than \$25,000 is awarded annually through this program.**

From left: Becoming Whole block party in Penticton; Gardening in Keremeos

Bursary for returning students creates fresh start for local celebrity

A few years ago, former radio host, Mare McHale, wrote a highly-successful blog helping others deal with mental health and grief. As a result, many people asked her for one-on-one sessions. She was touched by the idea, but also felt that with more expertise, she would be better able to help those who were struggling. She enrolled in a bachelor of social work degree program, but as a single mom, needed financial assistance.

“When I was looking for bursaries and awards there was nothing there for mature students or students returning to school,” said McHale – except for the Community Foundation that

offers educational awards, not based on academic achievement to both graduating and returning students.

“It was a big risk to go back to school and to know that I had the support of the Foundation was very validating for me,” said McHale. “Especially because who the Foundation is and what they do for our community, I felt humbled to be chosen for an award.”

Once McHale is finished her schooling she plans to work locally, and eventually pursue a Masters. “I would like to take what I learned through school and through my own personal experience and help people who are struggling.”



Mare McHale shares the impact of a bursary

Funding projects, programs and events in your community



Photo credit: Hanna Gould Photography

We provide funding for so many great initiatives and grant programs including those for youth-led initiatives, gender equality, Canadian Healthy Communities, and educational opportunities. To help our communities, we host grantwriting workshops, presentations, and giving events such as 100 Women Who Care, 100 Men Who Care, and community giving events such as the 50 Impactful People in Princeton event (left), which raised much-needed funds for fire and emergency services in Princeton, Erris, Eastgate, Hayes Creek and Tulameen!

Funding helps ignite the arts community with new festival in the Okanagan

It's no secret that the pandemic has been especially hard on the performing arts. And so, with the promise of brighter days ahead, Penticton Art Gallery curator, Paul Crawford, was itching to restart the arts with the Ignite the Arts Festival.

“We wanted to be the first event that gets people out,” he says of the 2-week event held in April 2022, which featured music, art showings, indigenous cultural events and storytelling, sculpture contests and much more at locations across Penticton.

While tickets were sold for events during

the second week, all events during the first week were entirely free. “We needed an event that would bring people to our city in some of the not-so-busy times but also give people a reason to stay and take part in the festival.”

To offset the cost of running the festival and providing free opportunities, the Community Foundation provided a grant for \$7,500. “We have many donors who are very supportive of the arts community,” says the Community Foundation’s Sarah Trudeau. Mark your calendar for next year’s event!



Dancing in the park at Ignite the Arts Sculpture Day

Relief funding for Princeton flooding flowed through the Foundation

Almost immediately after the devastating November 2021 floods, the Community Foundation worked with the Town of Princeton to set up the Princeton Flood Relief fund that, **thanks to donors large and small, raised more than \$1 million for local residents.**

Individuals, local businesses, service organizations, clubs, restaurants, local employers, large industry, credit unions and even the Canucks Foundation all stepped up to donate and to fundraise

in all sorts of creative ways.

A huge thank you to everyone who helped and continues to help Princeton on its long road to recovery. Knowing that the threat from other natural and climate-related disasters looms over our region, the Community Foundation is continuing to build new and innovative ways to fund proactive activities, as well as develop ways to help communities respond and recover.



Innovation and leadership in supporting your communities

At the Community Foundation we believe in taking leadership and looking for new opportunities and innovative ways to help our communities! This means working locally and also spearheading projects that have the potential to spread provincially, such as our reconciliation collaborative with IndigenEYEZ. As we innovate to help donors and help communities, we are creating new partnerships, finding new ways to invest with impact, helping with crisis response and recovery, and nurturing new societies.



Kim Lenton residence supervisor at The Bridge

Building gives women a supportive place to recover

With a safe place to stay, local mother, Sally, was able to focus on completing a recovery program, all with the aim of having her children returned to her care. "With the support of staff, she navigated the child welfare system, became trained in a trade, acquired permanent employment and secured affordable housing," explains Kim Lenton, residence supervisor at The Bridge, a nonprofit supportive recovery housing program. "She's an excellent example of the incredible potential of all those we are honoured to serve at The Bridge."

Now, thanks to an innovative funding opportunity created by the Community Foundation, women like Sally can get the extra help they need. "Rather than simply providing a grant, we purchased a home in a residential neighbourhood in Penticton,

which is then leased back to this charity to use," says Aaron McRann, Executive Director at the Foundation, explaining that this type of impact investing was first used to purchase a building for the successful Youth Resource Centre in Penticton.

Rosie, whose long-time partner died of an overdose, has also recently stayed at The Bridge to focus her attention on recovery. Before long, she found full-time employment and an apartment. Even more gratifying, Rosie found the confidence and passion to give back to the community, now acting as a peer mentor within the healthcare system. "She is a shining example of our work towards resilient communities where everyone thrives," says Lenton.

Foundation and IndigenEYEZ bring reconciliation to the table

Would you like to know how to work towards reconciliation in your day-to-day life? Table Talks, a new pilot program being developed by the Community Foundation of the South Okanagan Similkameen with IndigenEYEZ, aims to bring non-Indigenous and Indigenous community members together in a safe space to have deep conversations about reconciliation. The hope is to spark ideas about how people can respectfully build relationships and take action in their work and in their personal lives.

“Change requires us to think, feel, and act differently,” says Kim English of the Community Foundation, and change can start with meaningful conversation.

In fact, the idea for the Table Talks program was sparked by a conversation between Kim English and Kelly Terbasket, the syilx Okanagan director

of IndigenEYEZ, an Okanagan-based initiative that delivers popular land-based, creative empowerment trainings for Indigenous peoples.

“As a mixed heritage person, I’ve learned to transform my own internalized barriers to real connection,” says Terbasket. “I have lived the divisions that colonization brought and I am committed to helping change this for our upcoming generations.”

Table Talks is being developed locally, with the aim to eventually host conversations across the province. “We’re thrilled to be leading a project that can have such a positive impact locally and eventually reach a much wider audience,” says English. “Working on this is so important, and really fits with our own organization’s commitment to gaining deeper learning of syilx



Kim English and Kelly Terbasket

Okanagan values and understanding the local impacts of colonization.”

“Indigenous people have so much to offer,” says Terbasket. “We are the roots of this country and need to be treated as such. In syilx culture, we have this powerful concept of pa’x which speaks to the way that coming together as people can spark understanding. Table Talks can be the spark that helps light the way forward.”

ntamtqen snm’a?m’aya?tn uses Covid relief funding to create safe gathering spaces

Dealing with Covid meant that ntamtqen snm’a?m’aya?tn, the Lower Similkameen Indian Band School, had to make extra space for administration, a covered waiting area for staff and students, and hire a second janitor to help clean.

To help fund these extra costs, and because ntamtqen snm’a?m’aya?tn doesn’t

receive the same funding as public schools, the school applied to the Community Foundation for a \$40,000 grant.

“The funding they received made a huge impact for not only the school but for the teachers, students and parents,” says Sarah Trudeau, Grants Manager.

Thanks to funding from an anonymous

donor, the Foundation was able to find many innovative ways to help ntamtqen snm’a?m’aya?tn, which offers a holistic program grounded by the traditional principles of the sməlqmíx people, as well as help many other businesses and nonprofit organizations cope with the impact of the pandemic.

Setting Society up for success

The Community Foundation plays a unique role incubating new organizations such as the Canadian Alcohol Use Disorder Society, a nonprofit formed in Penticton, which advocates for a new understanding of AUD as a treatable medical condition.

“Alcohol Use Disorder is a root cause of so many social issues, so providing administrative support to this society, founded by a recognized leader in our

community, Dr. Jeff Harries, makes a lot of sense, and will help many,” says Aaron McRann, Community Foundation Executive Director.

Dr. Harries (pictured receiving a provincial award for his work) died from complications of ALS in late 2021. With the Community Foundation’s help the Society continues his legacy.



Message from 2021 Outgoing President

Tom Kampman



It has been a true honour to be the president of the Board of this Community Foundation, and to work alongside effective and innovative directors and staff, and most importantly to work with donors and supporters who are so eager to make positive change in our region.

As you've read, we support donors with a wide variety of giving choices so that they can improve the community in a way that matches their giving goals.

And, as always, we provide grants to every area of need in the region. From giving out grants to neighbourhoods to adding to our investment portfolio by purchasing a home that is leased to a charity supporting women recovering from addictions, we are giving choices and funding change! But we can only do this great work by partnering with donors so I invite you to learn more on our website, or talk to us about how we can help you make a difference in the community you love.



Alexandra Welsman

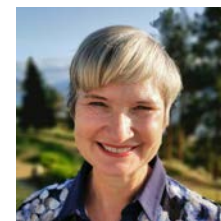


Bruce Tawse

Meet our Board of Directors



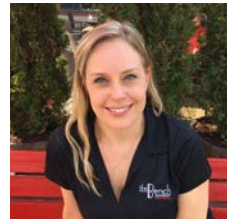
Colette Stoof, Treasurer



Colleen Pennington



Graham Lyle, Vice President



Heather Glynes



John Archer



Maimie De Silva



Suzanne Tining



Nolan Adam

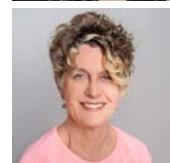


Robin Robertson



You will be missed!

The Board wishes to recognize and thank **Marielle Brule** and **Kim Lyster** for their 12 years of dedicated service as directors of the Foundation. Both have been instrumental in the Foundation's growth and innovative community leadership. As we say goodbye to Kim and Marielle, we are delighted to welcome Melisa Edgerly and Wayne Heal to the Board for 2022.



Get involved

Find out about volunteer opportunities, attend a 100 Women Who Care or a 100 Men Who Care event! **Meet new people and support the community.**

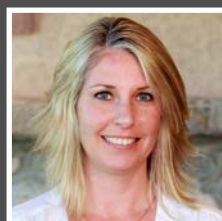
Blake Crocker shares a beer with friends he's made at 100 Men Who Care events.



Talk to our Staff



Aaron McRann
Executive Director



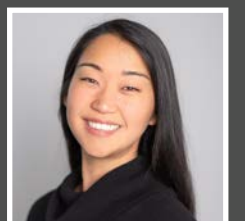
Kelly Helfrich
Office Administrator



Kim English
Regional Development Officer



Sarah Trudeau
Manager of Grants & Community Initiatives



Yuki Ihara
Donor Services

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