



Photo credit: Unlimited Vision

**Giving Choices.**  
**Funding Change.**  
In Your Community.

**We are committed to helping spark and grow healthy, vibrant, inclusive & caring communities across the South Okanagan Similkameen.**

**Our Vision** • A healthy, caring, inclusive and thriving South Okanagan Similkameen region.

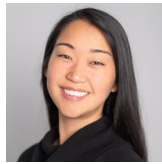
**Our Mission** • We facilitate partnerships, empower others, and inspire citizens to make our communities better.

## Staff

Our small staff bring a wealth of experience, passion, and dedication to this work. They are the champions supporting our many partnerships, grantees, donors, and community initiatives.



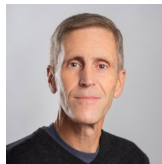
**Aaron McRann,**  
CEO



**Yuki Ihara,**  
Donor Services Manager



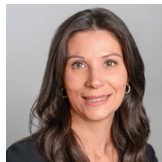
**Kim English,**  
Regional Development  
Manager



**Kevin Ronaghan,**  
Grants & Community  
Initiatives



**Kelly Helfrich,**  
Office Administrator



**Sarah Trudeau,**  
Community Foundations  
of Canada Granting



**About the cover photo:** This photo is courtesy of LocalMotive, an Okanagan based enterprise working to build a connected food network.

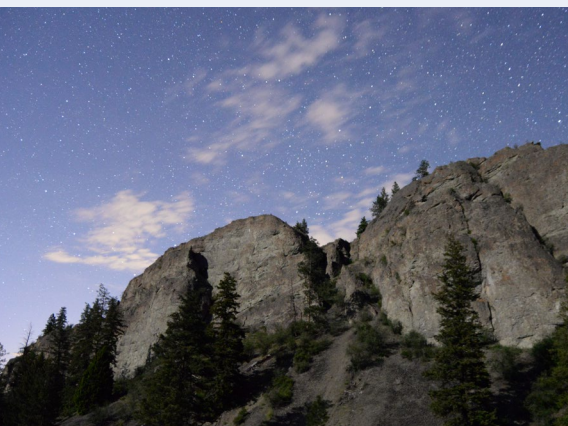
Our organization's vision would be impossible to achieve without the local farmers who bring food to our tables. Our Foundation is committed to working with them, and with other actors in the food system, to build a just, resilient, and sustainable local food system where enough healthy food is available to everyone.

*Photo credit: Unlimited Vision*

## Board of Directors

Robin Roberston, *President*  
Tom Kampman, *Vice President*  
Colette Stoof, *Treasurer*  
Nolan Adam  
Derek Badger  
Maimie De Silva  
Melisa Edgerly

Heather Glynes  
Wayne Heal  
Raj Kavia  
Graham Lyle  
Benamm Maughn  
Leighton McCarthy  
Suzanne Tining



The Community Foundation of the South Okanagan|Similkameen acknowledges that our work occurs on the ancestral homelands of the nsyilxc̓an speaking peoples of the Syilx Nation. We respect their sovereignty and role as stewards of this land. We are committed to cultivating respectful, reciprocal relationships with all First Nations, Inuit, and Métis.

**We encourage individuals to reflect on their personal responsibility in advancing reconciliation efforts with Indigenous Peoples.**



# 2023 was an incredible year for the Community Foundation South Okanagan Similkameen!

**We celebrated 30 years of service to our region, found innovative ways to ensure residents of Penticton continued to have walk in medical services, and gratefully accepted a donation of \$4 million (the largest in our history) from one of our founding donors.**

Since I began as a board member in 2015 our assets have more than doubled and along with that our ability to provide grants, bursaries and other forms of support to individuals, groups and non-profit agencies. *We honour and value the trust you have placed in us.*

The Board is made up of people working and living in this region who share your desire to create healthy, vibrant and inclusive communities. I want to personally thank the board members who volunteer considerable time to organizational governance and oversight.











On behalf of the Board, I also express my gratitude to our top-notch staff led by Aaron McRann. This team works every day to ensure CFSOS is a trusted organization, helping you create legacies and realize your giving goals. And congratulations to the team for winning the Non-

profit Excellence award from the Chamber of Commerce in Penticton! You can see what CFSOS stands for in the work we do in the region – from Summerland to Princeton to Osoyoos. Thank you for your contributions in 2023 and in the years to come. Together we can do great things!

  
**Robin Robertson,**  
Board President



## 2023 by the numbers

|   |   |   |
|---|---|---|
| <br><b>\$1.1m+</b><br>distributed in 2023                | <br><b>319</b><br>grants made              | <br><b>\$124,775</b><br>in Neighbourhood Small Grants      |
| <br><b>\$9.7m</b><br>total amount granted in our history | <br><b>100</b><br>charties received grants | <br><b>\$49,690</b><br>awarded in bursaries                |
| <br><b>\$20m</b><br>in assets under management           | <br><b>\$7m</b><br>received in donations   | <br><b>382</b><br>people donated to the Foundation in 2023 |
| <br><b>169</b><br>funds managed                          | To view our financial statements, visit <a href="http://www.cfso.net">www.cfso.net</a>  |   |

January

## Charity Check-in



When someone asks, “what is a community foundation?” we used to say “we make grants to charities to make communities better”. But we have evolved and grown over the years and today our answer is different. Today we say, **“we make communities**

**better by supporting the non-profit sector, sometimes with grants and often with other tools.”**

The Charity Check-in served as the launch of our effort to support capacity building in the non-profit sector. If we can build the skills, knowledge, and capacity of the sector, we will be helping them make our communities better. Without our non-profit community partners, the foundation cannot accomplish its goals of building strong, healthy and vibrant communities where everyone belongs.

## About the Charity Development Fund

In early 2023, we launched the Charity Development Fund to help create a stronger and better-connected charitable sector in our region.

**The Fund was set up to provide opportunities for support** beyond our grant making activities, such as:

- critical organizational development work
- governance
- strategic planning
- financial diversification

Activities supported by this Fund will be undertaken in close consultation with local charities and non-profits – *including those who attended our Charity Check-In event.*

February

## 100 Men Who Care

The members of 100 Men Who Care demonstrate how the power of many small gifts can collectively make a significant impact. The



group kicked off another year of learning and giving in February, and over the course of 2023, **members generously donated a total of \$23,800** to support charities and non-profits working to make our region more healthy, caring, inclusive and thriving.

## Grant Recipient Partners:

- Foundry Penticton
- Penticton & Area Access Centre
- Oonkane Friendship Centre
- Penticton Community Fridge and Pantry
- Okanagan Fruit Tree Project
- Salvation Army Penticton Food Bank
- Penticton Centre for Exceptional Learning Society
- Summerland Kinsmen
- Penticton Youth Centre
- Community Foundation of the South Okanagan Similkameen
- Central Okanagan Foundation
- Shuswap Community Foundation

## Community Services Recovery Fund

The Community Foundation not only uses its own financial resources to support organizations; through its participation in the Community Foundations of Canada network, it acts as the conduit for many external funding programs. Such is the case with the **Community Services Recovery Fund**, an investment by the Government of Canada to support charities and non-profits to adapt for pandemic recovery.

**We delivered a total of \$306,000 in funding to eight organizations in our region** through this Recovery Fund.

## Grant Recipient Partners:

- Erris Volunteer Fire Association
- Lower Similkameen Community Services Society
- Desert Valley Hospice Society
- OneSky Community Resources
- Dragonfly Pond Family Resource Society
- Penticton & Area Access Society
- Penticton Indian Band
- South Okanagan Recope Society

➤ [Read Desert Valley Hospice Society's story here.](#)

## Donor Check-ins

At the start of each year, we report back to our donors on the activities of their Fund.

Some donors choose a specific cause or charity to support indefinitely. Others prefer a donor-advised fund, allowing them to decide yearly where the money goes. This flexibility lets donors, or their families, adapt their giving to emerging community needs or causes.

For instance, through their Fund held with the Community Foundation, the Okanagan Fest-of-Ale Society chose to direct their annual contributions to six food banks in the region.



> [Read how the Penny Lane Legacy Fund supports youth here.](#)

> [Read about Local Food Banks here.](#)

## Planning of Investment Readiness Program

The 3rd round of the Government of Canada's Investment Readiness Program (IRP) was launched and administered by an Okanagan Valley partnership between the North, Central and South Okanagan Similkameen foundations. **This year's funding, totalling \$267,000 for our valley, was granted to four agencies throughout the region to support their work to develop sustainable business models by blending social enterprise and traditional charitable activities.** In total, this program has provided over \$450,000 in funding to our region.

## 100 more homes

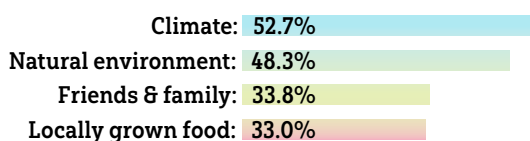
The Foundation is proud to participate in 100 More Homes Penticton, along with many other community organizations. **The collective provides important collaboration opportunities, advocacy, and planning to support the development of a more inclusive and equitable housing plan for our communities.** While winter shelters, emergency shelters and other efforts to support the unhoused often receive the most attention, it's important to remember that our communities need more housing of all forms.

## Vital Signs Community Survey

Vital Signs has become an important tool for community foundations across the country to **measure the well-being of their communities** and report those findings back to spark discussion and action. The community foundation kicked off this year's reporting process with a community survey which received almost 1,000 responses. The information gathered from the survey formed part of the final Vital Signs report which was released in October.



### We asked survey respondents to identify the best things about living in the South Okanagan Similkameen:



> [Take a look at the Vital Signs Report here.](#)

"Although the population is growing, I appreciate living in an area where there are still working farms and there are still wild areas nearby."

~Comment by survey respondent

VitalSigns.



## 100 Women Who Care

100 Women Who Care South Okanagan has been a force for good since its inception in 2014, and 2023 was no exception. Each event focused on a different theme, shining the spotlight on charities supporting Arts & Culture, Animal Welfare, and Children & Youth. Thanks to the generosity of our members, **we were able to direct \$20,849 to local charities this year.**

100 Women Who Care is coming up on ten years. In its history, **this giving circle has given out over \$150,000 to 58 unique local charities!**

### Grant Recipient Partners:

- Penticton Academy of Music & Dramatic Arts
- Penticton Public Library
- Ryga Festival Society
- Animal Lifeline Emergency Response Team Society
- Critteraid
- BC SPCA South Okanagan Similkameen Branch
- Central Okanagan Foundation
- Community Foundation of the South Okanagan Similkameen
- Shuswap Foundation
- Agur Lake Camp Society
- Highway to Healing Support Society
- OSNS Child and Youth Development Centre



# 112

Active members in  
100 Women Who Care  
Giving Group

## 30th Anniversary Celebration

On April 20th, the Community Foundation celebrated its 30th Anniversary with a memorable event attended by over 200 supporters including donors, charities, businesses, and community leaders. The significance of **the occasion was underscored by the proclamation from the City of Penticton, designating the day as "Community Foundation Day."**

The event was capped off with a toast to the various community builders and leaders the Foundation has had the honour of working with over the 30 years of our service.



## Regional Celebration

In May, we brought our anniversary celebration to the Oliver Wine District. It was meaningful to us to host this event outside of Penticton, emphasizing our commitment to serving the entire RDOS region. Although we began as the "Penticton & District Community Foundation," our reach and impact have always extended far beyond city limits.

### Community Funds:

- Kaleden Community Fund
- Lower Similkameen Community Fund
- Okanagan Falls Community Fund
- Oliver Community Fund
- Osoyoos Community Fund
- Princeton & District Fund
- Summerland Community Fund
- Penticton & District (Regional) Fund



# Community Foundations of Canada Conference

Canada is unique in the strength of its 200-strong network of community foundations. Every two years, **community foundations from across Canada and around the world gather for a national conference to learn, share and grow.** Our staff was there in full force, taking part in a whole host of learning and networking sessions. This year's conference focused on (re)building connections post-COVID, learning about significant changes to the way charities operate under the Income Tax Act, and discovering the many creative ways community foundations are finding to make their communities better.



## Foundation Bursary Program

The Community Foundation has long been involved in supporting the education goals of students of all ages and backgrounds: by managing scholarship and bursary funds delivered by other organizations, and through its annual Foundation bursary program.

Our Foundation bursary program cycle started in April. A three-month application and evaluation process — including a review by a committee of community members — culminated in the announcement of 24 bursary award recipients in early July. These students, pursuing studies in fine arts, humanities, sciences and trades, shared more than \$49,000 from 10 bursary funds.

24

student recipients

\$49,000

total bursary awards

> [Read about students realizing their dreams here.](#)

## Neighbourhood Small Grants (NSG)

NSG supported 70+ projects with grants up to \$500. From block parties to cultural events, neighbours celebrated where they live.

In 2023, the NSG program continued to turn ideas into action, offering grants for individuals to enhance community connections. NSG promotes diverse neighbourhood initiatives, cultivating resilient and interconnected communities through events like:

- Neighbourhood Pancake Breakfast in Summerland to welcome Ukrainian refugee family
- Youth-inspired revamp of a skate park in Princeton
- Dark Sky Movie Night in Naramata

Co-funded by CFSOS, Vancouver Foundation, and the City of Penticton, NSG projects were delivered in partnerships with local governments and the Regional District. **CFSOS also coordinates and facilitates with eight NSG delivery partners in the BC interior, amplifying the program's transformative impact province wide.**



> [Read NSG project stories here.](#)

June

July



## Food Security Conversations

Over its 30-year history, the Community Foundation has forged many strong ties with local community organizations. As a result, we are well positioned to convene those organizations and facilitate strategic conversations about critical social issues.

Such is the case with our role in **bringing Penticton's food access programs together to talk about the state of food security in the city and work on collaborative responses** to the ever-growing need for their services. The first meeting of this group took place in July, with a follow-up meeting in October and plans for further meetings in 2024. The work underscores our commitment to addressing the challenges facing our local food system – a commitment which resulted in food security being identified as an impact focus in our most recent strategic plan.

"I make \$27.00 per hour and need to work more than one full-time job to be able to afford the luxury of eating healthy."

~Comment by survey respondent

"Food affordability is affecting our household for the first time in decades."

~Comment by survey respondent



VitalSigns.

### Survey Question:

**Can your household afford an adequate amount of healthy food?**

- Yes, all of the time: **51.2%**
- Yes, most of the time: **30.6%**
- Yes, some of the time: **14.8%**
- Rarely/never: **3.4%**

## Table Talks - Pilot Project

**kinSHIFT Table Talks** is a grassroots initiative that sparks individuals to engage in courageous conversations about Indigenous-specific racism and reflect on their personal responsibility to advance reconciliation efforts. **It invites everyone to participate, requiring only a willingness to learn and desire to create meaningful change.**

Equipped with a user-friendly toolkit of resources and online training, over twenty volunteers hosted discussions throughout the year. "Table Talks serves as a stepping stone towards cultivating right relationships, layering the groundwork for genuine, authentic, and sustainable actions", said Kelly Terbasket, the co-founder and creative director at IndigenEYEZ/ kinSHIFT. CFSOS concluded its two-year pilot project with kinSHIFT and will continue to support organizations to participate in Table Talks, reaffirming our commitment to reconciliation through vital conversations within community.

As one participant reflected, **"Table Talks helped me to reflect on and express my views, and without having to get into a place of heated discussion. Now I feel like I can get curious, ask good questions, and support folks who are unaware, with more awareness"**.

> [Learn more about kinSHIFT here.](#)

A two-day retreat in Naramata (citx<sup>w</sup>s paqəłqyn) hosted conversations on anti-Indigenous racism, **urging participants to reflect on their responsibility as guests on Indigenous lands.**



Contact IndigenEYEZ or the Community Foundation to learn how to become a Table Talk host or guest. *Table Talks* was funded by CFSOS, Vancouver Foundation, and the NSG Program.



## 100 Men & Women support Wildfire Relief

The 2023 wildfire season was a devastating reminder of the destructive power of natural disasters – and a testament to the power of communities coming together in times of crisis. 100 Men and 100 Women Who Care were both part of the incredible response community members had in support of those affected by wildfires. The groups elected to direct their donations that month to wildfire relief funds with the Shuswap Community Foundation, Central Okanagan Foundation and our own Community Foundation's Community Response Fund.

## Grant Writing Workshops

2023 saw the return of in-person grant writing workshops across our region. Our Grants & Community Initiatives staff presented sessions in Summerland, Keremeos, Oliver and Princeton during September and early October. The workshops offered "tips and tricks" from a grantmaker's perspective for crafting a compelling grant proposal. The sessions are an example of how the Community Foundation can provide "support beyond the cheque" by helping to build grant-seeking capacity in the non-profit sector.

**6** Charity Development Events  
**35** workshop attendees  
**60** social attendees  
**40** charity check in attendees

## Community-run Clinic

Keeping a walk-in clinic open is not "normal practice" for a community foundation, but when community partners approached us about the crisis that would result from the impending closure of the Apple Plaza Walk-in Clinic we knew we had to act. By taking on the head lease in partnership with Community Futures, the Community Foundation worked with local doctors to ensure the clinic only lost one day of operations. Between the re-opening of the clinic in October and year end the clinic saw more than 3,000 patients, most of whom did not have a family doctor. Imagine the strain on the health care system (and the patients!) if the clinic had been allowed to close as planned!

## Vees Community Heroes



The Vees Community Heroes Program was reignited for the 2023/24 hockey season. A partnership between the Community Foundation and the Penticton Vees junior hockey team, the program recognizes and supports local charities at home games throughout the season. The program not only provides vital financial support to community organizations, but also shines a spotlight on the incredible work being done by individuals and groups in Penticton.

**\$50,000+**

granted to

**35**

charities since the 2018/19 season

## Charity Social

Through our Charity Check-In, we heard from charities that opportunities to connect with each other was important. We responded by hosting a Charity Social, where staff from organizations could talk and network with each other without an agenda.



VitalSigns.

### Report Data on doctors:

**Approximately 9,000 residents are looking for a family doctor in the South Okanagan Similkameen.**

Reported by South Okanagan Similkameen Division of Family Practice.

## Pen-High Leadership Class Halloween Fundraiser

We teamed up with the Pen High Leadership class to organize a Halloween haunted house and block party at the Penticton Youth Centre. This collaborative effort involved many hands, including Greyback Construction constructing the maze, Total Restoration crews clearing the space, and sponsorships from Norval Rentals and Castanet. The basement of the Foundry was transformed into a spooky maze that delighted over 300 kids, teens, and families.



## Non-Profit Excellence Award

**CFSOS received the Not-for-Profit Excellence Award at the 36th Annual Penticton & Wine Country Chamber of Commerce Business Excellence Awards.** We're honoured and grateful for the recognition. Our staff and volunteers work tirelessly to make a difference, and this acknowledgment is truly exciting. We want to emphasize that this achievement would not have been possible without the longstanding support of our many community partners and generous donors. Our collective collaboration and commitment is instrumental, and we look forward to continuing our work together for a better community.



## 2024 Foundation grants announced

Following the Community Foundation's annual grant program is a key vehicle for our delivery of financial resources to charities and non-profits. In December, after an application and review process that began in August, we announced a total of **\$260,185 in discretionary grants to 36 organizations** across the South Okanagan Similkameen, including Princeton & District Community Services Society, Osoyoos & District Arts Council, Oliver Seniors Centre Society, Penticton Soupateria and Neighbourlink Summerland.



- > [Read about ALERT's animal rescue efforts in times of emergency](#)
- > [Read how the South Okanagan Loss Society is supporting youth with grief and loss](#)

## Community Foundation receives historic donations

Two incredible donations marked the end of the year for the Community Foundation. We were honoured to receive a **\$1 million donation from the Summerland Credit Union** and a **\$4 million donation from John Pankiw, one of the founding donors of the Foundation.**



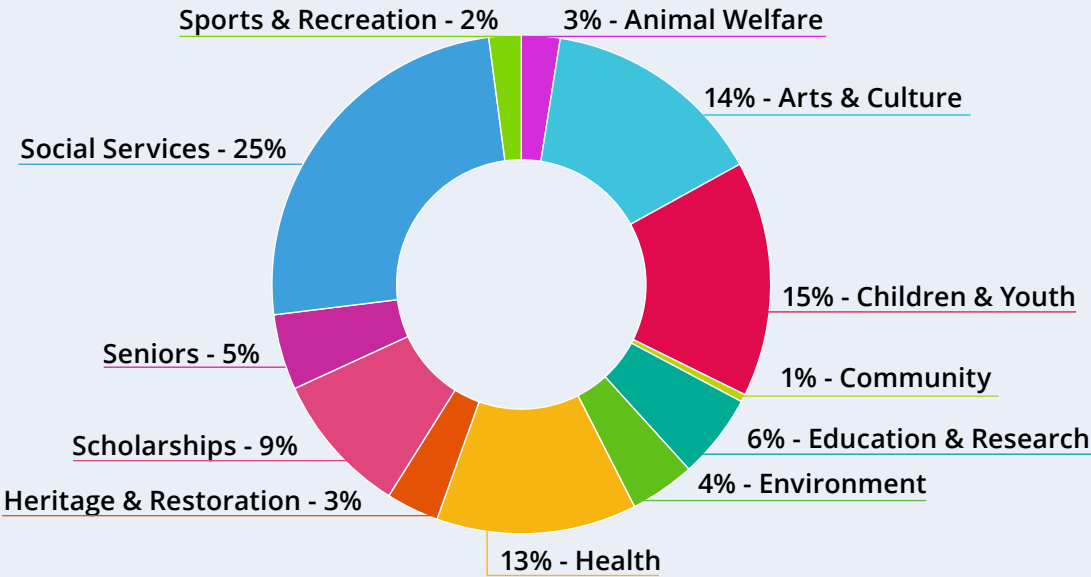


# Grants by \$ distributed

We're pleased to be able to grant funds across a broad spectrum of fields of interest.

In 2023 we distributed \$1.1m+, and made 319 grants to over 100 charities.

For a full list of grant recipients, please visit our website.



## Your Fund Options:

- Bursary Fund** – Support students in our region as they advance their education
- Agency (Charity) Fund** – Charities can create their own source of stable, long-term funding
- Community Fund** – Give back to where you live by supporting one of our many Community Funds
- Discretionary Fund** - Donors can rely on the Foundation's expertise to respond to the community's changing needs
- Donor Designated** – Donors designate a favourite charity to receive annual support, forever
- Donor Advised** – Donors let us know which charities they'd like to support on an annual basis

## New Funds created in 2023:

- Adra Tunnel Restoration Fund
- Animal Lifeline Emergency Response Team Fund
- Belyea Brothers Fund
- Charity Development Fund
- Charlie & Dot Cranston Fund
- Cindy Nielsen Fund
- Community Cycling Fund
- Corbishley Family FT Fund
- Pankiw Family Fund
- SOS Community Primary Care Clinics Fund
- The Penticton Community Fund

For a full list of all Funds, please visit our website.



## Thank you to our donors, supporters and partners

We want to express our heartfelt thanks for your support, which comes in many forms—whether it's a donation, volunteering your time, inspiring giving, sharing ideas, or contributing your skills. Your generosity and impact remind us that positive change can happen in many ways. Thank you for being a part of our community and for making a difference in the lives of others.



## Giving Choices

We offer a wide variety of ways for people to give back to their community

## Funding Change

We also help individuals and organizations fund community projects, programs and events

### Get involved!

- Give to an existing fund or start your own
- Check out our 100 Women & 100 Men Who Care events
- Ask us about volunteer opportunities
- Check out our Vital Signs Report

### Find out more!

- Subscribe to our newsletter
- Visit our website, [www.cfso.net](http://www.cfso.net)
- Find us on Facebook  
[@cfsouthokanagansimilkameen](https://www.facebook.com/cfsouthokanagansimilkameen)

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

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