

2024 Annual Community Report



Giving Choices. Funding Change. In Your Community.

Connecting Community

We are committed to
achieving our vision
of a healthy, caring,
inclusive, and thriving
South Okanagan
Similkameen.

Board of Directors

Robin Robertson, *President*
Maimie De Silva, *Vice President*
Colette Stoof, *Treasurer*
Heather Allen
Derek Badger
Morgan Edgerly
Wayne Heal
Leighton McCarthy
Suzanne Tining
Veronica Vinge
Nicholas Vincent



We extend our heartfelt
gratitude to **Tom Kampman**
for his invaluable contributions
and dedicated service
throughout his full 12 year
term as Board Chair and
Director. **Thank you, Tom!**

Front & back cover images:

Ignite the Arts is a city-wide
festival in Penticton, organized
by the Penticton Art Gallery,
celebrating creativity, inclusivity,
and cultural connection through
workshops, performances,
and community events.



Photo credit: Gord Goble

Staff

Our 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.



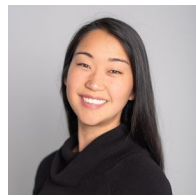
Aaron McRann
CEO



Kim English
Community
Relationships Manager



Kelly Helfrich
Office Administrator



Yuki Ihara
Donor Services
Manager



Kevin Ronaghan
Community
Investments Manager



Muhammad Usman
Director of Finance



Jean Wedenig
Operations Assistant

The Community Foundation of the South Okanagan |
Similkameen recognizes that we live and work on the
unceded homelands of the nsyilxcən-speaking Syilx people.

We honour their deep and enduring relationship with
these Lands and Waters and are grateful for their
stewardship since time immemorial. As we support
sustainable, connected communities, we commit to
listening, learning, and working in ways that respect and
uphold Indigenous knowledge, rights, and leadership.

Message from the Board President, Robin Robertson



As we reflect on the past year, it's clear that the Community Foundation of the South Okanagan | Similkameen continues to be a dynamic force for good in our region. With every initiative, grant, and partnership,

we are deepening our impact and strengthening the social fabric of the communities we serve.

In 2024, we fully embraced our role as *Community Investment Specialists*. This means leveraging our deep understanding of local needs, building meaningful relationships with community partners, and ensuring that the generosity of our donors translates into real, measurable change. It also means being responsive, forward-thinking, and willing to take bold steps when our communities need us most.

This year, we were proud to **grant nearly \$1.5 million** to support a wide range of local organizations and initiatives. We co-secured the head lease for the

Community Walk-in Clinic in Penticton—ensuring its doors remain open to those who rely on it most—and **helped guarantee the Summerland Food Bank's investment in their new permanent location.**

We also continued to support the impactful work of **100 Women and 100 Men Who Care**, providing the administrative backbone that allows these grassroots giving circles to thrive. And we hosted community screenings of ***Uncharitable***, **sparking important conversations about the future** of the charitable sector.

Behind all of this is a growing team of dedicated professionals who are passionate about creating lasting change—and who are increasingly called upon to share their expertise and support others across the non-profit sector.

None of this would be possible without the continued support of our **donors, fundholders, partners, and volunteers**. Thank you for believing in the power of community. We're proud of what we've accomplished together—and even more excited about what lies ahead.

2024 by the numbers

\$1.47 million+
distributed in 2024

\$11.1 million
total amount granted
in our history

\$49.8 million
in assets under
management

\$3.34 million
received in donations

183
funds managed

370
grants made

111
charties received grants

\$190,022
in Neighbourhood Small
Grants

\$57,685
awarded in bursaries

355
people donated to the
Foundation in 2024

To view our financial statements, visit www.cfso.net

With Discretionary Funds...

Donors rely on the Foundation's expertise to respond to the community's changing needs.

Discretionary Funds give the Foundation the greatest flexibility to respond to a wide variety of needs. Some grants address emerging issues, while others support project and program delivery, operations, equipment purchases, and much more.



When organizations choose to give back through a discretionary fund, they ensure their values live on in the work of others.

Princeton Masonic Lodge – A Legacy That Lives On

After more than a century of dedicated service, the Princeton Masonic Lodge #95 has officially closed its doors. But its legacy of community support is far from over.

To continue their tradition of giving, the Lodge established two new endowment funds, **Princeton Masonic Lodge #95 Bursary Fund** and the **Princeton Masonic Lodge #95 Legacy Fund** with the Foundation - the latter is dedicated to supporting local charities in the Princeton area. These funds turn a century of service into a permanent source of support for Princeton charities.

With Community Funds...

Donors give where they live.

Many communities in our region have a community fund with us, which support local projects and programs. By donating to the Fund, residents can help their communities now, and in the future.

Neil and Shirley Murray

The **Oliver Community Fund** was established in 2000, thanks to the vision and dedication of **Neil and Shirley Murray**, along with a group of like-minded residents who believed in building a lasting legacy for their town.

Longtime volunteers and community champions, Neil and Shirley understood the power of giving where you live. Their leadership helped create an endowment fund that supports local projects and programs, ensuring that Oliver thrives not just today, but for generations to come.

We were deeply saddened by Neil's recent passing (predeceased by Shirley in 2020), and continue to honour the memory of both Neil and Shirley. Their legacy lives on through the fund they helped build, one that continues to invest in the people and place they loved so much.

Read more: www.cfsociety.net/stories/murray-family/



Oliver Community Fund

The Oliver Community Fund is more than an endowment, it's a reflection of the values Neil and Shirley championed: *service, generosity, and love of community.*

Community Funds:

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

\$227,000

funding provided by
Discretionary Funds

Discretionary Funds:

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 Legacy Fund
B2B Fund
Barbara Pearce Summerland Community Fund
Charlie & Dot Cranston Fund
Children's Trust Fund
Chris Grauer Endowment Fund
Cindy Nielsen Fund
City of Penticton Trust Fund
Environmental Legacy Fund
Eva & Herbert Rosinger General Fund
Francis & Marion Kanuit Fund
Fund for Youth
George & Eva Kassa Legacy Fund
Harman Community Development Fund
Harold & Irene Myers Family Fund
John & Doreen Wisenden Fund
John Pankiw Family Fund
Kampman Family Fund
King Kirkpatrick Endowment Fund
King Kirkpatrick Flow Through 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
Penticton Children Wellness Fund
Princeton Masonic Lodge #95 Legacy Fund
Providence Funeral Homes Legacy Fund
Rita Fawcett Memorial Fund
Rotary Club of Penticton Legacy Fund
Summerland Credit Union Fund
Wood Family Fund

With Agency Funds...

Charities create their own source of stable funding.

More than 20 charities have set up their own Agency Fund with us. Their Fund is invested so that earnings are granted back to the charity, year after year.

Agency Funds:

Animal Lifeline Emergency Response Team Fund
BC Schizophrenia Society - Penticton Fund
Crittteraid 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
OSNS Legacy Fund
PDCRS Fund
Penticton & District Community Arts Council Fund
Penticton Art Gallery Legacy Fund
Penticton Public Library Fund
Princeton Museum & Archives Legacy 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

Established in 2006, the **Nk'Mip Desert Cultural Centre Legacy Fund** ensures future generations will continue to learn from the past.



Nk'Mip Desert Cultural Centre

The **Nk'Mip Desert Cultural Centre** is a place where stories, language, and traditions of the Okanagan people are kept alive—and shared with the world. Led by General Manager Jenna Bower, whose family has long been involved in this work, the Centre offers programs in nsyilxcən language, traditional dance, and cultural practices that connect community members of all ages to their heritage.

The Nk'Mip Desert Cultural Centre Legacy Fund, established in 2006, helps ensure this important work continues for generations to come. As an agency fund with the Community Foundation, it offers long-term, stable support for ongoing cultural preservation.

Read more: www.cfso.net/stories/nkmip/

Penticton Seniors' Drop-In Centre

Established in 2020, the **Penticton Seniors' Drop-In Centre Society Fund** was created to support the long-term sustainability of a much-loved community hub. Now, thanks to a generous estate gift, the fund is growing, *and so is the Centre's future.*

Agency Funds like this one are always open to contributions, making them a meaningful way for donors to leave a lasting legacy. This recent bequest will help ensure the Centre has access to stable, ongoing funding for years to come, strengthening its ability to offer programs, connection, and support for seniors in our community.

From social connection to essential services, the **Penticton Seniors' Drop-In Centre** plays a vital role in the lives of local seniors. A recent bequest will help ensure that work continues, today, tomorrow, and beyond.



Image courtesy of Penticton Herald, Penticton Seniors' Drop-In Centre, 30th anniversary gala

With Donor Designated Funds...

Donors support their favourite charities.

When a donor is certain about what they'd like to support, they can set up a fund with us and name a specific charity to receive grants from their fund, in perpetuity.



This fund proves that a thoughtful giving plan today can meet tomorrow's needs.

A 10-Year Journey: The Schellenberg Endowment Fund

Established in 2013, the fund was originally intended to support a future Performing Arts Centre. But the Schellenbergs added a thoughtful stipulation—if the project didn't come to life within ten years, the funds would be redirected to healthcare. In 2024, that contingency came into play, and **\$34,000 was granted** to the South Okanagan Similkameen Medical Foundation **to support the new Oncology Clinic.**

With Donor Advised Funds...

Donors can change up their charitable choices.

Donors can check in with us on an annual basis to select a charity and to learn about emerging community needs.

Summerland Credit Union

Giving with Flexibility and Focus.

The Summerland Credit Union has long been committed to supporting their local community. Through their Summerland Credit Union Legacy Fund, they're able to give strategically—adapting their support to meet evolving needs in Summerland.

By partnering with the Foundation, they can direct their giving where it's needed most, year after year, without the administrative work of managing their own foundation. It's a flexible, effective way to make a lasting impact close to home.

Peterson Family FT Fund

Funding with Flexibility and Heart.

While some donors plan years ahead, others want to respond in real time. The Peterson family chose a flexible approach, creating a fund that could support urgent needs as they arise. Especially those benefiting children and youth.

By trusting the Foundation to present pressing opportunities, their fund was able to support the Fairy Gradmother program just in time for grad! The fund helped 26 students participate fully in their graduation celebrations.

Donor Designated Funds:

Bob & Frances Garland Fund
Brule Windeler Legacy Fund
Colin & Lois Pritchard Foundation Fund
Edith Forster Legacy Fund
Friends of the Gardens Fund
Harold & Donna Schellenberg Legacy Fund
House Endowment Fund
Hugh & Eva Cleland Fund
Irvine & Doreen Adams Memorial Fund
John Sloane Brain Injury Legacy Fund
Katie Lynn Apgar-Knezacek Fund
Knights of Pythias Penticton Fund
Knights of Pythias Lodge #49 Legacy Fund
Kristi's "Supporting the Dream" Fund
Magdus & Roy Ornamental Gardens Legacy Fund
Marjorie Maclean Fund
Merle Waite Endowment Fund
Okanagan Nation Women's Emergency Fund
Patricia & Murray Craig Memorial Endowment Fund
Richard & Rose Cooper Fund
Ryga Festival Society Fund
South Okanagan Research & Capacity Building Endowment Fund
SS Sicamous Marine Heritage Fund
Toni & Bernie Cattani Legacy Fund for the Arts
Vance's Camp Boyle Legacy Fund
Winkelaar Family Fund
Term Endowment Fund:
Schellenberg Family SOPAC Fund

Donor Advised Funds:

100 Men Penticton Legacy Fund
Barbara Macdonald Family Fund
Bjerkman Family Fund
Business Gives Back Fund
Debbie Nelson Fund
Greenwood Forest Products Legacy
Jamieson Family Fund
Neil and Shirley Murray Family Fund
Okanagan Fest-Of-Ale Legacy Fund
Oliver Rotary Endowment Fund
Pankiw Family Fund
Pat Buschlen Memorial Fund
Penny Lane Community Legacy Fund
Penticton Auto Dealers Fund
Penticton Oldtimers Hockey Club Legacy Fund
Peterson Family Fund
Ron Bell & Family Fund
SOSCP Legacy Fund
Stoof/Straatsma Family Fund
Summerland Credit Union Legacy Fund
Susan & Thomas Kelly Fund
Tony & Judy Lloyd Family Fund
Flow Through Funds:
Amigos de Canada Flowthrough Fund
Corbishley Family Flowthrough Fund
Peterson Family Flow Through Fund
Sharon Romank Flow Through Fund

With Bursary Funds...

Donors support education.

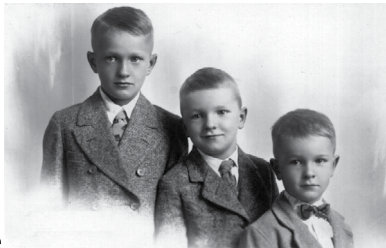
Donors can set up bursaries to honor individuals or to focus on specific programs or skills, and they can choose to assist recent graduates or returning students — making education more accessible to all.

Belyea Brothers Fund

Three brothers. Three bursaries. One legacy of courage and opportunity.

A new bursary fund called the Belyea Brothers Fund was established in 2024 to honour the courage and sacrifices of the three brothers during World War II, providing financial support for graduating and mature students in the region who wish to further their studies. The fund offers three awards—each named for one of the brothers—providing meaningful support for students, while creating a lasting tribute to the Belyea family's legacy of service and resilience.

Read more: www.cfso.net/stories/belyea-brothers/



From Refugee Camp to University: Yar's Remarkable Journey

When community support meets determination, remarkable things happen.

Born and raised in a Kenyan refugee camp after her family fled conflict in South Sudan, Yar Ayuen Mach never let go of her dream of going to university.

After resettling in the South Okanagan with the support of the **Summerland Refugee Sponsorship Group**, Yar began high school at 16, determined to succeed. Now studying Social Sciences at the **University of Victoria**, she's exploring new interests in psychology and artificial intelligence, with a bold vision to help solve global challenges.

Yar received support from the **Dr. John & Kathy Scarfo Bursary Fund**, which helped ease financial pressures during her first year.

Read more: www.cfso.net/stories/yar-machs-story/

"From the bottom of my heart, I truly appreciate all the support I've received. This is going to make a huge difference for me in my first year of university. I hope that one day, I'll be able to achieve my dreams and give back to our community in a meaningful way."

Yar Mach, 2024 Dr. John & Kathy Scarfo Bursary Fund recipient



\$57,685

awarded
in bursaries

30

bursaries granted
in 2024

"It's important that us young artists are getting support from our community. It really goes beyond the funding; it's about having people there who support us and believe in us and it fuels our inspiration and makes us want to work harder and keep doing what we do."

Tianna Ferlizza, 2024 Sharon Amos Legacy Fund for the Arts recipient

Bursary Funds:

Alanna Matthew Memorial Fund*
Belyea Brothers Fund*
Blanche & Rollo Ceccon Legacy Bursary Fund
Canadian Federation of University Women Fund
COP Centennial Legacy Fund
Culver Family Bursary Fund*
Dr. John and Kathy Scarfo Fund*
Eva & Herbert Rosinger Scholarship Fund*
Frances Harris Fund
Harold & Flora Hoey Fund
Irene & Charles Armstrong Bursary Fund*
Kaleden Bursary Fund
L&R Supplementary Bursary Fund*
Lynn & Brian Jackson Endowment for Fine Arts*
Morris & Birgit Rosenberg Bursary Fund
Music Under the K Fund
Okanagan Similkameen Concert Society Fund
Pat Clarke Memorial Bursary Fund
Penticton Women In Business Fund
Princeton Masonic Lodge #95 Bursary Fund
Ramada Inn Viticulture Fund
Richard & Rose Cooper Fund
Scott & Helen Perry Bursary Fund
Sharon Amos Legacy Fund for the Arts*
SO Boundary Labour Council Fund
South Okanagan Indigenous Education Fund*
Tara Bowie Bursary Fund*
Thea Haubrich Legacy Fund*
Trehearne Family Fund
Trish & Phil Medical Bursary Fund*
Weyerhaeuser Legacy Fund
*delivered through the Foundation's annual Bursary program

Bursary Recipients*

Taylor Bierlmeier
Brooke Binding-Sirianni
Owen Blaine
Maria Brown
Ciara Browne
Hashanah Cabug-os
Javier Carlos
Tiana Ferlizza
Artur Graefenstein
Meghan Harms
Josephine Kay
Samuel Kleiver
Maya Lefebvre
Brook Letourneau
Roy Lucich
Amy Lucich
Amer Mach
Yar Mach
Daniel Nixon
Devan O'Gorman
Ibukunoluwa Omojuwa
Viktoria Quindt
Kiran Rochon-Woitzik
Starla Rorison
Daryl-lee Schalm
Kyra Souch
Camryn Sweeney
Kyrach Van der merwe
Jackson Van Raes
Larissa Watt

*Does not include bursaries chosen by organizations other than the Foundation

With Foundation Grant Programs... We provide positive impact throughout our region.

What Are Foundation Grants?

Foundation Grants are one of the many ways we support local organizations working to make our region stronger. Whether through our annual community grants program, donor-advised funds, or partner initiatives like the Okanagan Prosperity Fund, these grants help fund the essential work happening in our communities every day.

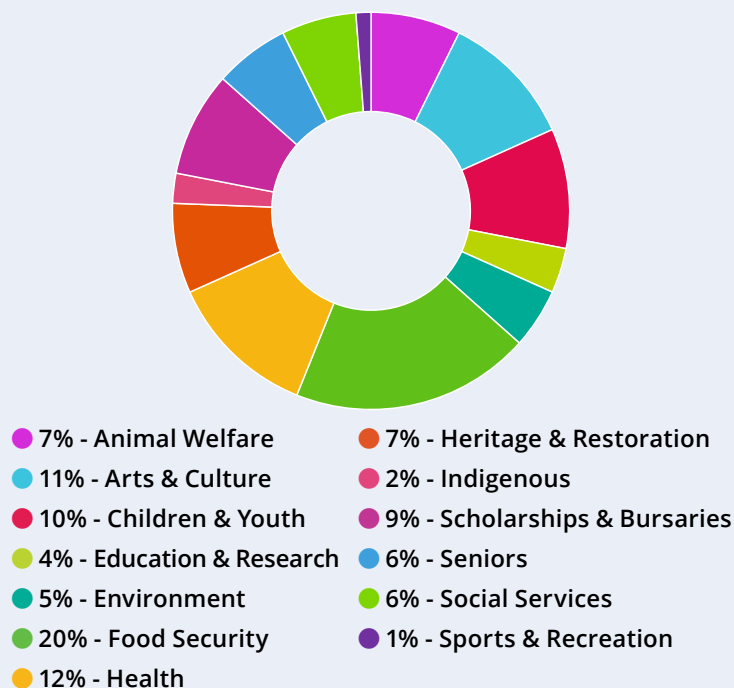
In 2024, the Foundation awarded **382 grants to 112 community organizations**, addressing a wide range of needs—from food security and youth programs to health services, arts and culture, and beyond.

Grants may support:

- Programs and projects
- Operational and staffing costs
- Equipment, supplies, or technology upgrades

This funding helps nonprofits deliver meaningful services today, while building their capacity to thrive into the future. Behind each grant is the generosity of our donors—and a shared vision of a **healthy, caring, inclusive, and resilient South Okanagan Similkameen**.

2024 Grant Distribution by
Field of Interest



“Food security has been a growing focus, and our grants have helped local organizations expand access, capacity, and collaboration.”

Kevin Ronaghan, Community Investments Manager

Grant Recipients:

Agur Lake Camp Society
AlleyCats Alliance Society
Alzheimer Society of BC
Animal Lifeline Emergency Response Team Society (ALERT)
Autism Okanagan
B.C. Wildlife Federation
BC SPCA South Okanagan Similkameen Branch
Canadian Feed the Children
Cawston Primary School PAC
Criteraid
Desert Sun Counselling & Resource Centre
Dragonfly Pond Family Society
Feedway Foundation
Friends of the Summerland Research Station Gardens
Highway to Healing Support Society
Inclusive Community Garden Society
Incredible Edible Penticton
Kaleden Community Association
Keremeos Senior Centre Society
Lower Similkameen Community Services Society
NeighbourLink Summerland
NK'MIP Desert Heritage Society
Oasis United Church Food Cupboard
Okanagan Boys and Girls Clubs
Okanagan College Foundation
Okanagan Gleaners
Okanagan Humane Society
Okanagan Nation Family Intervention & Services Society
Okanagan School of the Arts

Okanagan Similkameen Conservation Alliance
Okanagan Similkameen Parks Society
Okanagan Symphony Society
Okanagan Valley Music Festival Society of Penticton o/a Penticton Kiwanis Music Festival
Oliver & District Heritage Society
Oliver Foodbank
Oliver Senior Centre Society
OneSky Community Resources
OSNS Child and Youth Development Centre
OSNS Legacy Foundation
Osoyoos & District Arts Council
Osoyoos Community Food Bank
Osoyoos Seniors Centre Association
Penticton & District Community Arts Council
Penticton Academy of Music & Dramatic Arts
Penticton and Area Access Centre
Penticton Art Gallery
Penticton Community Fridge and Pantry
Penticton Public Library
Penticton Recovery Resource Society
Penticton Secondary Schools Bursary & Scholarship Foundation
Penticton Soupateria Society
Princeton & District Community Services Society
Princeton Baptist Church - Food Bank
Princeton Secondary School - Student Awards Program
Pythian Cerebral Palsy Committee
Regional District of the Okanagan Similkameen
Rotary Club of Summerland
Ryga Festival Society

S.S. Sicamous Marine Heritage Society
Salvation Army Penticton Family Services & Food Bank
School District No. 53
School District No. 67 (Okanagan Skaha)
Scouts Canada
South Okanagan Loss Society
South Okanagan Rehabilitation Centre for Owls
South Okanagan Secondary School
South Okanagan Secondary School Enrichment Fund
South Okanagan Similkameen Brain Injury Society
South Okanagan Similkameen Medical Foundation
South Okanagan Similkameen Mental Wellness Society
South Okanagan Women in Need Society (SOWINS)
Summerland Food Bank & Resource Centre
Summerland Singers and Players Society
TFL Technology for Living
The Canadian Red Cross Society, South Okanagan HELP Service
The Land Conservancy of BC
The Penticton Centre for Exceptional Learning Society
Town of Osoyoos
United Way British Columbia
University of British Columbia - Okanagan
Vermilion Forks Elementary School
Vermilion Forks Métis Association

With Partner Granting Programs...

We provide locals with access to funding from other sources.

In addition to its own grantmaking, the Community Foundation provides access to funding opportunities from other sources, including government and corporate funding programs.

In 2024, we were involved with these partner granting opportunities:

- Okanagan Prosperity Fund
- Fund for Gender Equality



Princeton Family Services Society is using their Okanagan Prosperity Fund grant to sustain the food security and social inclusion services they provide through two programs: The Belly Project and The Nook.



\$400,000

Total value of Okanagan Prosperity Fund grants made in the South Okanagan Similkameen

Table Talks Talking Reconciliation

All Canadians share responsibility for establishing and maintaining mutually respectful relationships.

— Principle 6, Truth & Reconciliation Commission

Many Canadians are working to repair relationships with Indigenous peoples. For the past 2 years, the Community Foundation has invested in a locally-grown initiative to advance reconciliation. We have been privileged to partner with Similkameen-based **IndigenEYEZ** to develop kinSHIFT: Table Talks—a program that empowers people to have meaningful conversations about colonization and its impacts on both Indigenous and non-Indigenous peoples.

“These conversations aren’t easy,” says Program Director Kelly Terbasket. “For generations, the education system perpetuated myths about Indigenous peoples and ignored the realities of oppression and racism.

Today, there are layers of misunderstandings to peel back to get to the truth that comes before reconciliation. In non-Indigenous communities, people are at different stages in their journeys to understanding.

What Table Talks does is offer resources and a structured process for sitting down around a table with friends and neighbours to ask questions, make mistakes, and learn— together.”

With support from the Community Foundation, the Neighbourhood Small Grants Program, and the Vancouver Foundation, Table Talks has been successfully piloted. IndigenEYEZ has created a high-quality, user-friendly guide to make starting these conversations easier.

Now, they’re expanding the program—helping individuals gather around kitchen tables and helping organizations engage in reconciliation at the boardroom table.

The vision is to grow Table Talks across B.C. and beyond, empowering more people to take part in building respectful relationships with Indigenous Peoples and their homelands.

As one participant shared, “Table Talks gave me a glimpse of a brighter future for our country.”

Learn more about Table Talks at www.kinSHIFT.ca



Table Talks is for anyone ready to engage in the courageous conversation of making reconciliation real. You don’t need to be a teacher or expert - this is a peer-learning space, all you need is the willingness to learn.

With Grassroots Giving...

Neighbourhood Small Grants.

Strengthening communities from the ground up! In 2024, Neighbourhood Small Grants supported 70 grassroots projects, bringing together hundreds of neighbours across the South Okanagan Similkameen. These small, yet powerful grants of up to \$500 spark creativity, nurture connections, and help cultivate a healthier, more vibrant, and inclusive region.



\$25,000
granted in 2024



70
projects
funded

Celebrating Community

From the Hedley Outhouse Races, to multicultural block parties and outdoor movie nights, residents created spaces for belonging and shared traditions.

Promoting Well-Being

Initiatives like the Similkameen 5K Walk/Run, Zumba, Buddha Bowls in Oliver, and the Keremeos Loss Group encouraged movement, nourishment, and emotional connection.

Growing Sustainability

Community gardens, seed libraries, and sustainability workshops promoted food security, ecological awareness, and intergenerational learning.

Advancing Reconciliation

Sharing Indigenous knowledge, and confronting Indigenous-specific racism fostered reflection, learning, and a deeper understanding of Syilx people and their homelands.

Strengthening Community Bonds

Projects like the Anarchist Mountain Quilters, Kenyon Park Clean-Up, and Seeds to Salsa in Summerland, reinforced the power of collective action.

A Lasting Impact

NSG proves that small initiatives create meaningful change. By supporting grassroots leadership, the Community Foundation strengthens communities—one project at a time.

The Neighbourhood Small Grants program is co-funded by the Vancouver Foundation, with additional support from the City of Penticton, to deepen support for residents. CFSOS delivers the program across the South Okanagan Similkameen and coordinates with eight partner organizations throughout the Southern Interior on behalf of the Vancouver Foundation.

Read more and get inspired with NSG project stories:
www.cfsos.net/neighbourhood-small-grants/

With Grassroots Giving...

We connect local people with local charity.

From giving circles to micro-grants, we harness grassroots generosity to create big change—right here at home.

100 Women Who Care – A Decade of Collective Impact

10 years. 300+ women. Countless lives changed.

In June 2024, 100 Women Who Care South Okanagan celebrated 10 years of giving together. Since 2014, more than 300 women have participated, contributing over \$180,000 to 68 local organizations. This simple idea—everyone giving a little—continues to grow, proving that collective giving creates lasting community impact.

100 Women grant recipients:

ASK Wellness Society
CMHA - South Okanagan Similkameen Branch
Enactus OC
Oasis United Church (Food Cupboard)
Okanagan Similkameen Conservation Alliance
OneSky (New Beginnings)
Osoyoos Lake Water Quality Society
Penticton Community Fridge and Pantry (Purple Pantry)
South Okanagan Immigration & Community Services
South Okanagan Similkameen Mental Wellness Society
South Okanagan Women in Need Society
Summerland Food Bank & Resource Centre



100 Men Who Care – A Growing Force for Good

100 Men. \$213,000 given since 2016.

At their September 2024 meeting, 100 Men Who Care reached a new milestone—surpassing \$213,000 in donations since the group began in 2016. In 2024 alone, members gave \$27,835 to causes supporting animal welfare, student success, and holiday support for families in need.

100 Men grant recipients:

Animal Lifeline Emergency Response Team
ASK Wellness Society
Bethel Church Penticton Food Pantry
Criteraid Animal Sanctuary
Desert Sun Counselling and Resource Centre
Interior Wildlife Rehabilitation Society
Neighbourlink Summerland
Okanagan College Foundation
Okanagan Similkameen Stewardship Society
Penticton Secondary Schools Scholarship & Bursary Foundation
Society of St. Vincent de Paul



“We at the Purple Pantry are hugely grateful for the extraordinarily generous donation from 100 Women Who Care. In a year like this, in which we, like other food sustainability organizations struggled to keep funds coming in, your donation represents more than a third of what we strive to raise in a year. It brings us back to a place where we can more generously keep the fridge and pantry stocked.”

Allison Howard and Dave Corbiel, Penticton Community Fridge and Pantry (Purple Pantry)



With Community Collaborations... We are able to make connections and drive innovation.

Our goal is to connect those who want to give with those on-the-ground creating change.

A Community-Led Solution for Primary Care

With more than 9,000 people in our region still searching for a primary care provider, a group of local leaders and health professionals came together to create a bold, community-driven response: the **Community Primary Care Clinic** in Penticton.

Led by the **South Okanagan Similkameen (SOS) Health Care Society**, and supported by partners including the SOS Division of Family Practice, Community Futures, the SOS Medical Foundation, and the Community Foundation of the South Okanagan Similkameen, this new clinic is set to open in summer 2025 in Penticton's south end.

"This is truly a community solution, developed and led by people who live here and understand the unique healthcare needs of our region."

— Dr. Tim Phillips, Board Chair,
SOS Health Care Society

The \$2.1 million clinic will serve as both a walk-in and primary care facility, designed to help ease the pressure



of clinic closures and address the physician shortage in the region. Already, 15 doctors have committed to walk-in shifts, nine primary care providers have signed on to relocate their practices, and **three new physicians** have committed to move to the area specifically to work at the clinic—bringing care to **up to 3,000 new patients**.

The Community Foundation is proud to support this initiative by helping secure a **\$430,000 donation through the SOS Community Primary Care Clinics Fund**, which supports the creation and operations of innovative and accessible health services across the South Okanagan Similkameen.

This is more than a clinic—it's a blueprint for community-driven healthcare solutions, made possible through collaboration, generosity, and shared commitment.

Donate now and support the SOS Community Primary Care Clinics Fund:

www.cfso.net/funds/community-primary-care/

Innovating Through Collaboration: Flipping Orthodoxies and Sharing Expertise

As the challenges facing communities grow more complex, so too must the ways in which community foundations show up to meet them. **Aaron McRann, CEO of the Community Foundation of the South Okanagan Similkameen**, has been a leader in championing bold, collaborative models that stretch beyond traditional roles.

At both the BC Community Foundations Conference and Community Foundations of Canada gatherings, Aaron has shared two key innovations:

- 1. "Flipping Orthodoxies"** – a framework that challenges conventional thinking in philanthropy, asking foundations to question limiting beliefs like "We don't fund operations" or "We stay neutral." Instead, it invites organizations to lead boldly, fund differently, and contribute meaningfully to systems change.
- 2. Collaborative Staffing Models** – an emerging approach that strengthens community foundations by sharing specialized staff across multiple organizations. This model ensures even smaller foundations can access top-level expertise, without the full cost of dedicated hires.

"We're moving away from a mindset of scarcity and into one of shared purpose," says McRann. "Collaboration doesn't dilute our work—it amplifies it."



This approach is already taking root in the Okanagan. Communications specialist, Lisa Deargle supports multiple foundations with high-quality marketing and storytelling, while donor services expert, Yuki Ihara helps streamline systems and deepen donor engagement across multiple foundations.

With clear agreements in place, shared roles are proving both cost-effective and transformative. Community foundations benefit from increased professionalism, donors enjoy a more consistent experience, and communities see stronger, more responsive foundations.

In a sector where operational resources are often stretched thin, collaborative staffing models are offering a practical path forward—one grounded in trust, efficiency, and a shared commitment to doing more, together.

With Community Collaborations... We grow stronger, more equitable, local food systems.

By bringing people and organizations together, we're supporting shared solutions to complex food challenges in our region.

Leading Local Food Security Conversations

In September 2024, the Community Foundation convened a regional gathering of individuals and organizations working to address food security. The *Food Security Summit* was a powerful demonstration of our commitment to collective action, bringing people together to explore solutions for a more resilient, sustainable, and equitable food system in the South Okanagan Similkameen.

Looking ahead to 2025, we're deepening our focus by dedicating our entire *Vital Signs* report to the issue of food security.



Collaborating for a More Food Secure Future

Food security became our top priority in 2023, guiding a strategic shift toward long-term, community-driven solutions.

\$70,658

Secured by the Community Foundation to strengthen infrastructure and support collaboration among local food access organizations.

Supporting the Capacity of Food Access Organizations

To strengthen the frontlines of food access, the Community Foundation coordinated a major grant request on behalf of five organizations addressing food insecurity in our region. The funding supported the purchase of critical equipment: bread slicers, food drying and packaging tools, cooking ranges, fridges, and freezers..

By sharing and coordinating the use of these resources, the organizations are improving collaboration and boosting the efficiency of their programs, so they can serve more people, more effectively.



Helping Highlight Indigenous Food Sovereignty

The Community Foundation was honoured to sponsor a community screening of *Tea Creek*, a powerful documentary showcasing the Indigenous-led food sovereignty and trades training initiative of the same name.

Hosted by Ntamtqen Community Garden & Food Hub, located on the traditional and unceded territory of the Lower Smelqmix (Similkameen) people, the event invited reflection and learning. We are deeply grateful to Tea Creek and Ntamtqen for sharing their knowledge and showing how initiatives like theirs can offer healing, connection, and renewed purpose.



With Stronger Support for Non-Profits...

We could build a sector that's bold, resilient, and better resourced.

What if we valued ambition as much as efficiency? From community screenings of *UnCharitable* to new investments in nonprofit professional development, we're helping shift the conversation toward stronger, more sustainable organizations that can do even more good.

Reframing the Conversation

About Charitable Funding

In 2024, the Community Foundation hosted six regional screenings of *UnCharitable*—a thought-provoking documentary that challenges the way we think about funding in the charitable sector. Instead of asking about overhead, the film asks a more powerful question: *What if we measured a charity by the size of its dreams?*

As part of our Vital Conversations series, these events brought together community members, nonprofit leaders, and donors across five communities. The discussions that followed were honest and eye-opening, shedding light on the real pressures non-profits face. From the stigma of competitive salaries to the outdated idea that all donations must go directly to programs.

These powerful conversations are already sparking change.



“Made me aware of the uphill battle that charities face,” shared one participant.

“Before this, I had an old-school mindset about how charities should invest their funds.”

“Being in a room of people who do the work and watching *UnCharitable* with them was so valuable,” said another. “I was one of those people who wanted my donations to go straight to the help part. But I get it now—it’s all the help part.”



Building Organizational Capacity

The Community Foundation understands that the strength of our charitable sector lies not just in its passion, but also in its people. Yet many local organizations struggle to access the training and resources needed to build the skills, confidence, and capacity of their teams.

To help address this, we launched a pilot **Professional Development Bursary Program** for nonprofit and charitable staff, as well as leadership volunteers. In its first year, the program awarded more than \$7,500 in bursaries to support training and learning opportunities across the region.

One recipient was the Dragonfly Pond Family Society, where staff used the bursary to access specialized training that helps them better support siblings of children with complex care needs.



When we invest in the people who power our nonprofit sector, we strengthen the entire community.

With Impact Investing...

We are able to leverage our assets to boost local organizations.

Granting isn't the only way we work with our communities, we invest in them too! Impact investing opens up new and innovative partnerships and allows us to make an even larger impact on the community.

Making an Impact for Youth

The Penticton Youth Centre remains a vital hub, serving over 1,000 young people each year through the work of OneSky's Foundry Penticton, YMCA, ARC Programs, and MCFD's Child and Youth Mental Health.

To improve accessibility, fundraising is underway for a new elevator, with momentum driven by a Halloween Haunted House event and a generous 2:1 matching pledge. This is impact investing in action—where strategic investment supports lasting change for youth in our community.

The What and Why of Impact Investing

Not every donor wants to start an endowment, and not every challenge can be solved with a grant.

Impact investing allows us to do more with what we have, putting our assets to work in ways that generate both a financial return and measurable community impact. It's a flexible, powerful tool that helps local organizations grow while giving donors another way to contribute to change.

One donor, inspired by the Community Foundation's current investments, made an immediate **\$200,000 contribution** toward our next opportunity. It's not just about the capital, it's about the excitement and creativity that impact investing brings. When charities learn that we can invest, it shifts their thinking. They begin to imagine new models, stronger operations, and bolder goals.

Impact investing is challenging work—but it's changing the way we think about philanthropy. And it's helping us build a more resilient, better-resourced community.



Flipping the Script on Philanthropy

What if community foundations saw themselves not just as funders, but as changemakers?

Aaron McRann, CEO of the Community Foundation of the South Okanagan Similkameen, has been challenging sector norms, urging foundations to move beyond passive investing and restricted granting toward bold, mission-aligned action. Whether it's **funding operations, sharing staff, or investing for impact**, Aaron calls on foundations to rethink their role entirely.

"The idea that our investments should be separate from our mission is one of the most limiting orthodoxies in our field."

From speaking at the BC Community Foundations Conference to one-to-one presentations to other Foundation boards, Aaron is championing a shift: one where foundations deploy all their tools; granting, storytelling, advocacy, asset ownership, and social finance—to drive lasting change.

The question isn't whether community foundations can do more: it's whether we're willing to rethink what we believe is possible.

Giving Choices.

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

Funding Change.

We 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

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