

2025 Annual Community Report

 **COMMUNITY
FOUNDATION**
south okanagan | similkameen



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 01/25 - 06/25



Maimie De Silva
President 06/25 - 12/25



Wayne Heal
Vice President



Colette Stooft
Treasurer



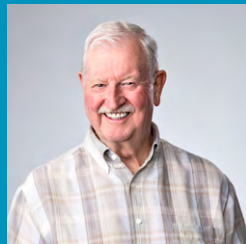
Heather Allen



Anna McGuigan



Morgan Edgerly



Leighton McCarthy



Neil Wyper



Suzanne Tining



Veronica Vinge



The Community Foundation of the South Okanagan Similkameen recognizes that we live and work on the unceded homelands of the *Syilx Okanagan* People.

We honour their deep and enduring relationship with these lands and waters, and are grateful for their stewardship for thousands of years. 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



Reflecting on the past year, the Community Foundation of the South Okanagan Similkameen (SOS) has worked alongside partners, donors, and volunteers to support a wide range of local initiatives. Our mission remains focused on strengthening

communities throughout our region—from Summerland to Princeton to Osoyoos—by responding to local priorities.

In 2025, we further established ourselves as community investment specialists—listening closely to local needs, cultivating trusted relationships, and channeling donor generosity into timely, meaningful support. This work often happens quietly behind the scenes, helping charities deliver programs, or stepping forward when our leadership is needed most.

This year, we helped essential services thrive by supporting the Community Walk-in Clinic and team-based primary care work in Penticton, providing the administrative support for grassroots giving circles like 100 Women and 100 Men Who Care, and backing dozens of neighbour-led projects through Neighbourhood Small Grants. These efforts, among many others, enabled us to invest more than \$1.5 million in community grants.

We also embraced our role as a convener and catalyst, particularly in advancing food security. Inspired by Ntamtqen Community Garden, we hosted a film screening of *Tea Creek*, sparking dialogue about Indigenous-led food sovereignty and sustainable food systems. This year's major achievement was securing our first \$2 million mortgage to support the Okanagan Food & Innovation Hub—expanding food security initiatives and nurturing innovation in our region.

Our work is rooted in people—donors, local organizations, and volunteers who give their energy, leadership, and care. On behalf of the Board, thank you for your trust. I am deeply grateful to our directors, whose vision and commitment guide our mission, and to our skilled staff, who make this work possible every day.

Thank you for being part of our community. Together, we are building the foundation for a more healthy, caring, inclusive, and thriving South Okanagan Similkameen.

- Maimie De Silva

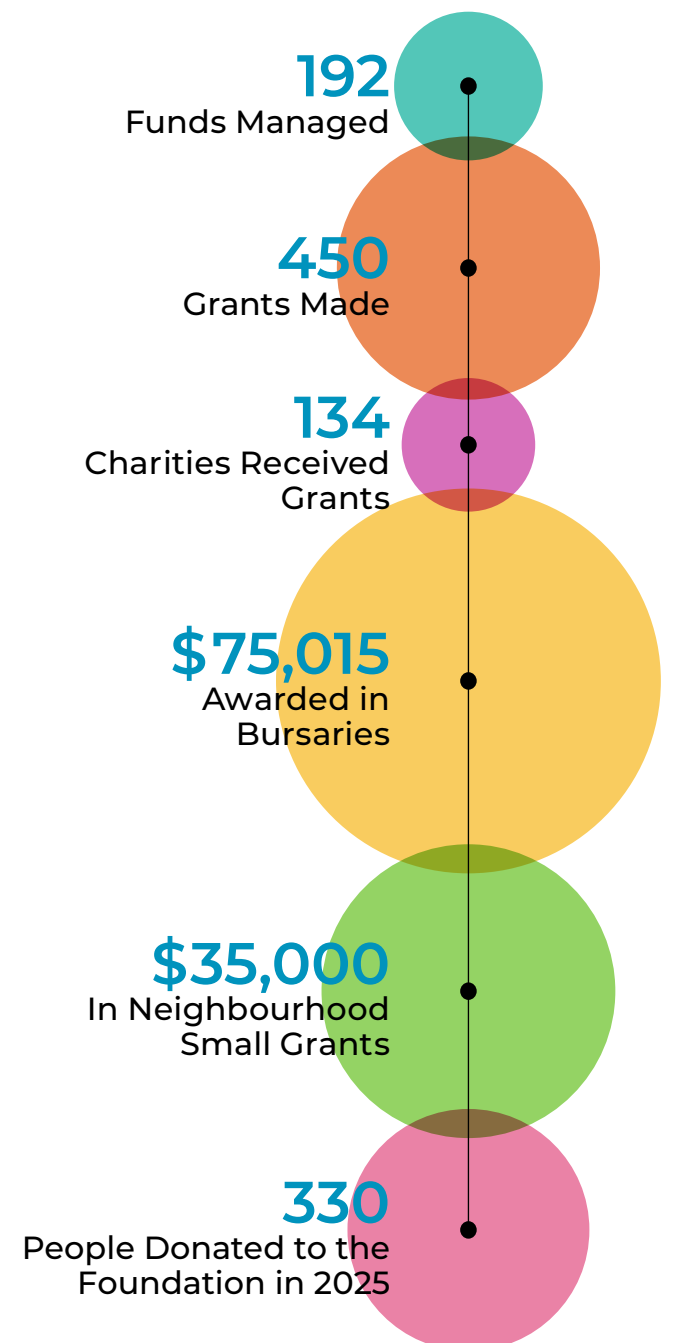
Our Collective Impact in 2025

\$2.7M
Distributed in 2025

\$12.8M
Granted Since 1994

\$53.2M
Assets Under Management

\$5.3M
Received in Donations





COMMUNITY INVESTMENTS

The Okanagan Food and Innovation Hub Impact Investing Supporting Local Food Systems, Regional Resilience, and Long-Term Prosperity

The Okanagan Food and Innovation Hub represents a significant step forward for our region in strengthening food security and local food systems. The Foundation's decision to support this project with a \$2 million mortgage—our first mortgage investment and the first of its kind made by a community foundation in Canada—reflects a commitment to practical solutions and a long-term vision for the entire Okanagan region.

This investment was made possible through collaboration with several other impact investors. By syndicating the investment, resources from

both within and beyond our region were pooled, expanding support for local food innovation. This partnership approach broadens impact while encouraging shared responsibility for positive change.

The clear needs identified in the 2025 Vital Signs report—which highlights food sovereignty as a key priority in our region—helped guide the development of the Hub. By bringing together farmers, producers, and community organizations, the Hub creates opportunities for local food entrepreneurs to grow their operations, reduce waste, and improve access to healthy, locally grown food.

This initiative is closely aligned with the region's food security goals, aiming to generate both financial returns and meaningful community benefits for those living in the valley.

Through the Foundation's impact investment, alongside funding from federal and provincial governments, resources are being mobilized to support lasting change. Designed as a catalyst for regional resilience and economic opportunity, the Okanagan Food and Innovation Hub will contribute to a healthier and more secure future for our communities.



Photo by Brennan Phillips, Penticton Western News: Colleen Schneider Medical Centre Grand Opening

843 Patients Attached
5k Unique Walk-In Clinic Patients

“ ”

We really appreciate the Community Foundation's help. These upgrades have truly transformed our theatre space.

- Kate Twa, Artistic Director



Tempest Theatre Capital Investment Grant Investing in Infrastructure That Sustains Local Arts and Culture

When Tempest Theatre approached the Community Foundation with a request for HVAC and lighting upgrades, we knew the project was well suited for support through a Foundation Capital Investments grant. This program helps community organizations undertake essential capital projects across the South Okanagan, including Summerland, Penticton, Okanagan Falls, Oliver, and Osoyoos.

Capital Investments grants require matching funding, and in Tempest Theatre's case, the Foundation's commitment helped demonstrate the project's value to another funder. With the matching support secured, Tempest was able to complete much-needed upgrades—creating a more modern, energy-efficient, and comfortable space for both performers and audiences.



CAPITAL GRANTS

Colleen Schneider Medical Centre Capital Grants, Donor Matching, and Clinic Fund Improve Access to Care Through Collaboration

Before the Colleen Schneider Medical Centre opened its doors in July of 2025, it was known simply as the CWIC project (short for Community Walk-In Clinic). The working title happened to sound like "quick," an apt description for a project that moved rapidly from concept to a fully operating facility through strong collaboration among many partners and supporters.

Through donor matching, capital grants, and the SOS Community Primary Care Clinics Fund, the Foundation contributed \$630,000 to help make the centre a reality. That investment is already having a clear impact on residents across the region.

Since its opening, the centre has attached 843 people to a family doctor. The walk-in clinic has also become an essential service, welcoming more than 5,000 unique patients and seeing a 70% increase in use compared to the former Apple Plaza location. With scheduled walk-in times replacing long waits, patients are receiving care more quickly and with greater certainty.

The clinic has also removed a critical barrier for youth on the autism spectrum. Each month, two to three young people can now access the general practitioner intake required for South Okanagan Assessment Program

(SOAP) assessments—support that was previously delayed due to limited access.

A key to the centre's success has been its ability to attract new physicians. Under the clinic's management model, the SOS Healthcare Society oversees operations, allowing doctors to focus on patient care rather than business administration. This balance of independence and operational support has already attracted five new physicians to the community, strengthening long-term access to primary care.

The Colleen Schneider Medical Centre came together through the efforts of contractors, architects, clinical leaders, funders, and nonprofit partners united by a shared goal. With funds raised quickly by the Society, the SOS Medical Foundation, and the Community Foundation, renovations were completed in just six months. The clinic is now full every day and has already sparked conversations about future expansion of the model into other communities.

This project demonstrates what is possible when community generosity and partnerships align. Because of supporters like you, thousands of residents can now access care more quickly, reliably, and close to home.

DISCRETIONARY FUNDS

Donors rely on the Foundation's insight 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.

George & Eva Kassa Fund 10 Year Milestone

Created in 2015 by Bryan Kassa in honour of his parents, the **George & Eva Kassa Fund** continues to reflect the deep community spirit that defined the Kassa family's lives in Princeton.

George, a long-time volunteer firefighter, credit union founder, and devoted community member, believed strongly in giving back. Over the past decade, the endowed fund established in his and Eva's names has provided **lasting support to Princeton** by generating **grants every year for local organizations and students**. Thanks to Bryan and Patti Kassa's ongoing commitment, the fund will continue strengthening the community George and Eva loved.



\$353,529

funding provided by
Discretionary Funds

\$198,242

funding provided by
Agency Funds

\$21,770

funding provided by
Community Funds

AGENCY FUNDS

Charities create their own source of stable funding

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



Agur Lake Camp Endowment Fund Building a Legacy of Inclusion

Agur Lake Camp began with a simple but powerful vision: to create a place where children with disabilities and their families could experience joy in nature. That vision, held by Bonnar Dowler and made possible through the generosity of the Agur family, led to the creation of an accessible camp on a wilderness site near Agur Lake, just west of Summerland.

The Agur Lake Camp Society was incorporated in 2004 and welcomed its first visitors in 2013. Today, the camp operates **three accessible cabins** from May through September, serving approximately **800 visitors each year**. Demand is strong, with summer occupancy reaching as high as **95%**.

For more than 25 years, an extraordinary community of volunteers has been central to the camp's success—contributing expertise, materials, and hands-on labour to build and sustain its facilities. Operating costs, including staffing, fuel, maintenance, and upgrades, have been supported through grants, fundraising, donations, and modest user fees. To ensure affordability, those fees are intentionally subsidized by approximately 70%.



As the camp looks to the future, plans include expanded capacity and new accessible amenities. Central to that vision is long-term financial stability. In 2025, the **Agur Lake Camp Endowment Fund** was established with the Community Foundation of the South Okanagan Similkameen, creating a permanent source of annual income.

This endowment helps ensure Agur Lake Camp remains a place of belonging, connection, and joy for generations to come.

COMMUNITY FUNDS

Donors give where they live

By donating to their local Community Fund, residents play an active role in building healthy, caring, inclusive, and thriving communities.



The Kaleden Community Fund Enduring Support for Community Priorities

Many communities across our region have established community funds with the Community Foundation, including Summerland, Penticton, Okanagan Falls, Oliver, Osoyoos, Princeton, and the Lower Similkameen. One of the largest and most active among them is the **Kaleden Community Fund**.

Launched in 2019 by local leaders, the Kaleden Community Fund strengthens the community's future through a **permanent fund** dedicated to **projects in Kaleden**. Donations are invested so the principal grows over time, while annual earnings support a wide range of local priorities—from **arts and culture to recreation, innovative programs, and essential services** for residents of all ages. This flexible approach allows the fund to respond to both immediate community needs and long-term opportunities.

In recent years, the Kaleden Community Fund has supported projects undertaken by the **Kaleden Community Association** that focus on making the community more welcoming and accessible for everyone. These improvements include a new community signboard and bench outside of the library, and the installation of an accessible picnic table in Pioneer Park—small but meaningful enhancements that help create shared and inclusive spaces.

The Jim and Gudrun Moore Legacy Fund Desert Sun Counselling & Resource Centre



Desert Sun is a vital non-profit serving Okanagan Falls, Oliver, and Osoyoos, offering compassionate support that helps people of all ages build safer and healthier lives. From counselling and crisis intervention to affordable housing, senior supports, and community connection, their grassroots programs respond to some of the region's most pressing needs.

Desert Sun created the **Jim and Gudrun Moore Legacy Fund**, named after its two initial donors. As an endowment, the fund will help secure Desert Sun's long-term impact and provide sustainable support for essential programs, including safe housing for women and children fleeing violence, free counselling, community meals, affordable housing, and transportation for seniors.

Donations to this fund help ensure Desert Sun can continue to support vulnerable community members long into the future.

DONOR ADVISED FUNDS

Donors participate in granting decisions

Donors learn about emerging community needs and make granting recommendations annually.



Penticton Oldtimers Hockey Club Legacy Fund Carrying Team Spirit Forward for Generations

Established in 2001 by what is now the Penticton Alumni Hockey Club, the Penticton Oldtimers Hockey Club Legacy Fund is a proud example of teammates giving back—together. As a donor advised fund, club members guide where grants are directed each year, ensuring support reflects the causes that have mattered most to their players and families.

Over the years, the fund has supported a wide range of community and youth-serving organizations.

The Oldtimers Hockey Club remains strong and forward-looking, with a shared hope that future players will continue stewarding the fund. In 2025, the fund also played a special role in supporting the Penticton Youth Centre Elevator Campaign, providing one of the final gifts that helped the community cross the \$300,000 goal line. We are grateful for their leadership, generosity, and commitment to community.

\$240,185
distributed in 2025



Cascadia Credit Union Giving with Flexibility and Focus

In 2024, the Community Foundation was proud to welcome Cascadia Credit Union's Osoyoos branch—formerly Osoyoos Credit Union—as the third founding partner in a growing regional movement of legacy giving. Their \$1 million gift established the Osoyoos Credit Union Community Legacy Fund, ensuring that nearly 80 years of local service and generosity will continue to benefit the community. This collaboration, alongside similar legacy funds in Summerland and Revelstoke, reflects a shared belief that strong communities are built through long-term investment and deep local commitment. By preserving capital and granting annually from investment earnings, these funds demonstrate how organizations and individuals alike can create lasting impact. We are inspired by this leadership and invite other donors to explore how legacy giving can help shape a vibrant and resilient future for our region.

BURSARY FUNDS

Donors support education

Donors can set up bursaries to honour 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.

\$79,515
distributed in 2025

33
bursaries granted
in 2025

Trish and Phil Medical Bursary Fund Investing in Tomorrow's Healthcare Leaders

A transformative \$1 million gift established the Trish & Phil Medical Bursary Fund, opening doors for local students pursuing studies that lead to a career in medicine. Administered by the Foundation, this multi-year bursary is designed to reduce financial barriers and strengthen the future of healthcare in the South Okanagan Similkameen.

“““

This bursary is an inspiring investment in our region's future. By supporting the next generation of doctors, donors are helping ensure every resident has access to care.

- Aaron McRann, CEO of Community Foundation

Eligible students must have graduated from a secondary school in Penticton, Oliver, or Osoyoos, and be committed to returning to practise medicine in our region. For many young people, this fund represents the difference between a dream and a real pathway into medicine.

This bursary is one example of how donors can create lasting impact through the Community Foundation—supporting education, strengthening community wellbeing, and helping solve local challenges.



“““

I am deeply grateful to be a recipient of the Trish and Phil Medical Bursary. This support relieves a substantial portion of the financial burden of my education and allows me to focus fully on my training as I work toward becoming a physician. I will continue to work hard to honour this support.

- Nathan Millward, the Trish and Phil Medical Bursary Fund 2025 recipient

DONOR DESIGNATED FUNDS

Supporting specific charities

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

\$102,420
distributed in 2025

Frances Harris Fund A Legacy in Every Brushstroke

The Frances Harris Fund transforms creative work into lasting opportunity. Proceeds from Frances Harris' painting sales were invested into an endowment in the 1990s, ensuring long-term support for fine arts in the South Okanagan Similkameen.

Rather than providing one-time gifts, the Fund was structured as a designated endowment—protecting the capital while generating annual support. Each year, it awards a scholarship to a third-year Fine Arts student at University of British Columbia Okanagan through the Community Foundation, supporting artists at a critical point in their education.

Additional art sale proceeds continued to grow the Fund over time, even beyond Harris' lifetime. In 2025, the Fund marked 25 years of continuous granting—a testament to how creativity, when thoughtfully structured, can create enduring impact.



The Sharon Amos Legacy Fund Helping Young Artists Take the Stage

The Sharon Amos Legacy Fund for the Arts was created in 2010 to support students pursuing a performing arts education. The endowment fund recognizes Amos' many contributions to the arts in Penticton. Pictured left are the 2025 bursary recipients Nakisa Sanai, Rowyn Davies, and Sadie Fornwald.

FOUNDATION GRANT PROGRAMS

Providing Positive Impact Throughout Our Region

\$602,153
distributed in 2025

What are Foundation Grants?

Foundation Grants are one of the many ways we support local organizations working to make our region stronger. Through our annual community grants program, and partner initiatives like the Gender Equality Fund and City of Penticton Municipal Grants program, these grants help fund the essential work happening in our communities every day.

In 2025, the Foundation awarded grants to address a wide range of community 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 community organizations 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 thriving South Okanagan Similkameen.



Arts & Culture	15%
Children & Youth	8%
Community	3%
Environment	3%
Food Security	14%
Health	9%
Indigenous	9%
Public Safety	3%
Seniors	9%
Social Services	16%
Sports & Recreation	11%



Photo: Algi on Unsplash

FOUNDATIONS WORKING TOGETHER A Shared Commitment to Safer Futures

Wildfires continue to shape life in B.C.'s Southern Interior, putting homes, ecosystems, and entire communities at risk. Recognizing the growing urgency, the Community Foundations of the South Okanagan Similkameen, North Okanagan, Central Okanagan, and Shuswap took meaningful and coordinated action.

Together, the four foundations contributed \$65,000 to FORWARD, launching the Okanagan Wildfire Coexistence Fund at UBC Okanagan. This fund is supporting advanced wildfire research at the Irving K. Barber Faculty of Science, where researchers are developing practical, community-serving tools to improve wildfire detection and response.

The initiative includes creation of a province-wide network of remote wildfire cameras and custom weather-monitoring sensors. Installed in partnership with the BC Wildfire Service, these systems provide real-time visuals and data on conditions such as heat, wind, and humidity—key factors that shape wildfire behaviour. This information enables faster response times and better planning for long-term management strategies, including prescribed burns.

An investment partnership between regional Community Foundations is raising awareness of the growing realities of living with wildfire, showing how collaboration can strengthen collective efforts.

For our Foundation, the project stood out for its direct, community-focused impact and its collaborative, interdisciplinary approach. The work brings together researchers, regional partners, and local expertise to create innovative solutions designed for the communities most affected by wildfire.

By investing in this fund, the regional Community Foundations are helping lay the groundwork for long-term wildfire resilience across the Interior. Their shared contribution reflects a commitment to advancing research and collaboration that will help protect people, homes, and landscapes as wildfire risks continue to grow.

In one of British Columbia's driest regions, restoring healthy water systems is essential for the wellbeing of local wildlife, ecosystems, and communities. In 2025, the BC Wildlife Federation (BCWF) launched its first restoration project of the season on Nature Trust of BC lands, using low-tech, process-based methods that mimic natural beaver activity to slow water, rebuild wetlands, and strengthen climate resilience.

As a funder, the Community Foundation is proud to support this work, which brings together Indigenous partners, conservation organizations, and restoration practitioners to improve water flow, expand wetland habitat, and restore critical wildlife corridors in the South Okanagan Similkameen. These efforts not only enhance biodiversity, but also help communities better withstand drought, wildfire, and flood risk.

This project also strengthened local restoration capacity through hands-on training with participants from First Nations, provincial agencies, and environmental organizations. By supporting both on-the-ground improvements and the growth of skilled practitioners, the Foundation is helping advance long-term watershed health across the region.

Photo by Jamie Long: BCWF's Watershed Team - 10,000 Wetlands Initiative



RESTORATION IN ACTION Supporting Natural Water Renewal

GRASSROOTS GIVING

Neighbourhood Small Grants Small Ideas. Real Impact.

In 2025, Neighbourhood Small Grants (NSG) supported 75 resident-led ideas that strengthened connection, care, and local leadership across the South Okanagan Similkameen. Through small, flexible grants, neighbours turned shared ideas into practical action—gathering on blocks, along rural roads, and in shared spaces to build relationships, trust, and belonging. These neighbour-to-neighbour connections form the foundation of resilient communities.

“““
After years of living here, neighbours finally met—and connected—in person.
- NSG Project Leader

\$35,000 | 75
Granted in 2025 | Projects Funded

NSG is rooted in relationships—from the residents who bring ideas forward to the 28 local volunteers from across the region who reviewed applications and, in many cases, showed up as neighbours themselves. Their stewardship reflects the spirit of the program—community members supporting one another. Beyond one-time events, NSG invests in people. It strengthens trust, nurtures emerging leaders, and lays the groundwork for future collaboration and collective action.



Neighbourhood Small Grants is co-funded by Vancouver Foundation through the Connect BC initiative, with additional support from the City of Penticton. The Foundation delivers the program locally and works in partnership with six community foundations throughout the Southern Interior as part of a regional network supporting resident-led action.

Thanks to the generosity of our members, 100 Women Who Care raised \$22,835 in 2025. Our 100 Men Who Care members closed out 2025 raising \$23,700. That brings the cumulative 100 Women/Men impact to over \$462,843 since our inception in 2016!



Member Spotlight: Rod Klaassen and Karen Rosenberg

Supporting the community has long been important to Rod Klaassen and Karen Rosenberg. Over the years, that commitment has taken shape through collective giving, thoughtful planning, and a desire to make their charitable support both meaningful and lasting.

Rod joined 100 Men Who Care Penticton in 2017, during the giving circle's second year. The model aligned well with his approach to philanthropy—straightforward, local, and focused on impact. Through 100 Men Who Care, Rod has supported a wide range of community organizations while staying closely connected to evolving local needs.

In 2022, Rod's partner Karen contacted the Community Foundation to make a donation. That initial conversation revealed the breadth of Rod and Karen's annual giving and sparked a deeper discussion about how to support the community in a more structured, long-term way. From this grew the Morris & Birgit Rosenberg Fund, a bursary endowment supporting students pursuing trades and agriculture-related training. Named in honour of Karen's parents, the fund reflects the family's strong roots in farming and education.

Soon after, Karen joined 100 Women Who Care and has been an active member ever since. Today, Rod and Karen participate in both giving circles, steward their bursary endowment, and work with the Foundation to coordinate and streamline their annual support for several local charities.

Together, their philanthropy spans collective giving, long-term investment, and coordinated local support—creating a thoughtful and lasting impact in the community.



ABCD Workshop Building Connection at Home

In October, the Foundation hosted **Built by Neighbours**, a two-day **Asset-Based Community Development (ABCD)** workshop—delivered in partnership with the **Tamarack Institute**. Grounded in the belief that lasting change begins with community strengths, the workshop brought together 65 residents from across the region to explore how relationships, local knowledge, and lived experience can spark meaningful change.

The momentum continues through the **Possibility Circle**—a monthly gathering launched in 2026 for residents committed to learning together, strengthening connections, and taking collective action close to home.



LEGEND:
OUR DOMAINS OF SERVICE
HOW WE ENGAGE

- **1. As Brokers**
We achieve our goals through supporting others to achieve their goals
- **2. As Catalysts**
We lead and engage in social change
- **3. As Facilitators**
We encourage and challenge others to collaborate to achieve community impact
- **4. As Advocates**
We engage leaders in imagining and pursuing a better world for all



Propolis Community Bond
The five community foundations in the Thompson Okanagan region joined forces to invest \$100,000 in the Propolis Community Bond to support community-led affordable housing. This partnership demonstrates how foundations can leverage capital together—strengthening regional connections and advancing sustainable solutions to our shared housing challenges.



Penticton Food Access Collective
Since 2023, the Community Foundation has convened a group of organizations that provide food access to community members in need. The group includes the Penticton Soupateria Society, Oasis Church Food Cupboard, Bethel Church Food Pantry, Penticton Elks Lodge 51, Penticton Community Fridge and Pantry, Society of St. Vincent de Paul, and Penticton Starfish Pack. The Collective gives members a chance to share information and resources, and work more closely together for greater impact.



Food Security Network
Launched following the first Food Security Summit, the Food Security Network connects individuals and organizations from across the regional food system. Facilitated by the Foundation, the Network brings together food access organizations, Indigenous food sovereignty programs, farmers, researchers, funders, and partners in health care and education.

IMPACT INVESTING

Is it possible to make good investments while also making good things happen in our community? We believe the answer is an unequivocal “yes”—and the term for it is impact investing.

Traditionally, about 5% of a foundation’s endowment is activated in the community through grants. Impact investing has the potential to activate the other 95% of foundation assets in support of community outcomes, while still sustaining traditional granting programs.

Like traditional finance, impact investing offers a range of tools. The difference is how those tools are used: to generate positive financial returns *and* meaningful community outcomes.

IMPACT FOCUS

Rising demand for food access has led to a sharp increase in grant requests by community food programs that struggle to keep pace. In response, the Foundation named food security as its three-year Impact Focus in 2023.

Our approach combines increased local investment with systems-level innovation to drive lasting change. Through convening food access organizations, investing in the Okanagan Food & Innovation Hub, and highlighting food security in our 2025 Vital Signs Report, we are working to build a more resilient, sustainable, and equitable local food system.



Thrive Impact Fund
Thrive Impact Fund is a BC-based investment fund focused on investing in nonprofits, charities, and social enterprises with strong business plans and meaningful goals for creating social outcomes. Thrive attracts investors from all walks of life, including individuals, foundations, and credit unions. By investing in Thrive, the Community Foundation is diversifying its impact investments and leveraging Thrive’s investor network to increase impact.

Okanagan Food & Innovation Hub
The Okanagan Food & Innovation Hub has the potential to transform our local food system through improved access to markets for farmers, food product innovation and development, education opportunities for emerging farmers, and additional food for access programs.

The Community Foundation is a key investor in the project—the first investment of its kind by a community foundation in Canada.



2025 Vital Signs Report
Vital Signs is our biennial report on the health and well-being of our region, drawing on indicators including health, environment, employment, education, and housing. In 2025, the focus was food security, reflecting our strategic impact priorities. Through this report, we aimed to deepen understanding of the complex and interconnected challenges shaping our local food system and inspire action toward a more food-secure South Okanagan Similkameen.

Penticton Youth Centre One Place. Lasting Impact.

In 2025, the Foundation and the broader community marked a significant milestone for the Penticton Youth Centre with the successful completion of the Elevator Campaign. The campaign raised \$300,000 locally—an amount matched two-to-one by a private foundation from outside the region—resulting in a total investment of \$900,000 in the Youth Centre.

\$300k ➤➤➤ **\$900k**

From the earliest planning stages, the elevator was part of the original Youth Engagement Strategy (YES) Project vision, reflecting a commitment to accessibility and inclusion. Completing the project in 2025 fulfilled a goal first imagined more than a decade earlier, when conversations about creating a dedicated youth hub in Penticton began in 2015.

The Penticton Youth Centre opened its doors in 2019 and quickly became a cornerstone of youth services in the community. Designed as a shared hub, the Centre brings together Foundry Penticton, the Ministry of Children and Family Development, ARC Programs, and the YMCA under one roof. This integrated model has reduced barriers for young people and strengthened access to coordinated, wraparound care. The Centre itself was also a key factor in bringing Foundry Penticton to the community, expanding access to mental health and wellness services for youth and their families.



The Foundation is sincerely grateful to Trevor Nelson for his leadership as Fundraising Chair. His dedication and tireless effort helped drive the success of the Youth Centre's elevator campaign.

The opening of the Youth Centre also marked the beginning of the Community Foundation's **impact investment** journey. This early investment demonstrated how community capital can be used creatively to support essential infrastructure while advancing long-term social outcomes.

The ripple effects of the 2025 Elevator Campaign extended well beyond Penticton. After visiting the Youth Centre and extending their knowledge of Foundry, the same private foundation that provided the matching gift went on to support and help secure both Foundry's provincial headquarters and the Vancouver Foundry site. What began as a local campaign became a powerful example of how community-led projects can influence broader investment and system-level change.

The Penticton Youth Centre continues to reflect the power of long-term vision, partnership, and persistence. From its earliest concept to the milestones reached in 2025, each chapter builds on the last, reinforcing the importance of creating **inclusive spaces** where **young people** can access the **care, support, and connections** they need in one place.



OneSky's Cycling Without Age Rides That Restore Connection

Cycling Without Age (CWA), operated locally by OneSky Community Resources, gives seniors with mobility challenges the chance to experience fresh air, nature, and community connection through volunteer-piloted bicycle rides. This international program, founded in Denmark, has grown steadily since arriving in the Okanagan and continues to bring moments of joy to local seniors.

With support from the Community Foundation, OneSky volunteers bring the program to life using a specially designed, electric-assist trishaw featuring a comfortable two-person carriage. These rides create meaningful social connection—passengers chat, laugh, and share stories with each other and the volunteer who pedals them along Penticton's pathways.

Even a simple outing becomes an adventure when experienced from a trishaw. On one ride, OneSky volunteers surprised seniors with a visit to the Tim Hortons drive-through, where they shared laughter with staff and enjoyed the small delight of a warm drink. These everyday community moments help seniors living in care homes feel connected, seen, and included in the life of the city. Cycling Without Age turns an ordinary coffee run into a reminder that joy, independence, and companionship are for everyone.

Taking part in the 2025 Peach Fest Parade placed seniors at the heart of one of Penticton's most cherished celebrations. Riding in a fully decorated trishaw, they waved to cheering crowds while OneSky's volunteer pilot pedaled proudly behind them. The joy on their faces captured everything Cycling Without Age stands for—**belonging, adventure, and the freedom** to feel the wind in their hair. Moments like this remind us that age should never be a barrier to participation or fun.



LEGACY CLUB



2025 Legacy Appreciation Event Honouring Generosity and Shared Vision



On November 29th, we welcomed our Legacy Club members and friends to the atrium of our new office for a special morning of gratitude and connection. This meaningful gathering offered an opportunity to share updates on the Foundation’s growing impact and celebrate those who have included the Foundation in their estate plans or established funds that create lasting change.

CEO Aaron McRann reflected on the Foundation’s evolution, followed by remarks from Tom Tumbach on the Okanagan Food & Innovation Hub—an inspiring example of regional collaboration. Legacy donors Jan and Keith shared their personal motivations for giving, underscoring the power of community commitment.

Guests were also treated to musical performances by Penticton Academy of Music and Dramatic Arts’ student Emma Goncalves and a preview of *Miracle on 34th Street* from the Summerland Singers & Players, adding a joyful creative touch to the morning.

We extend heartfelt thanks to all who attended and to every member of our Legacy Club. Your generosity and trust continue to help build a healthier and more vibrant South Okanagan Similkameen.



Janet Parker Trust Fund From Decades of Service to a Lasting Legacy

For decades, Janet Parker has helped shape Penticton through her generosity, leadership, and deep understanding of what local charities need to thrive. As a long-time volunteer on our Grants Committee and an active Board member with Discovery House, Janet has always paired giving with hands-on involvement and thoughtful strategy.

This year, she chose to take that commitment even further by creating the Janet Parker Trust Fund with the Community Foundation. Her fund is designed with dual impact in mind: part supports urgent community needs today, while the endowed portion is invested to ensure long-term, sustainable support for the causes she cares about.

Janet’s contributions were recognized nationally with the King Charles III Coronation Medal—a reflection of her lifelong service to Penticton. For us, the creation of her Trust Fund represents the full circle of her relationship with the Foundation and her vision for a stronger community.

Through the Janet Parker Trust Fund, Parker continues what she has always done best—caring for her community today, while ensuring future generations benefit from her enduring legacy.

“As a former member of our Grants Committee, Janet has long understood the importance of strategic, lasting philanthropy. Her new fund supports today’s needs while building tomorrow’s legacy. We’re honoured to help carry her generosity forward.”

Aaron McRann, CEO of Community Foundation



Sandra Nicolson’s Legacy Fund Believing in Every Student

For generations of students at Summerland Secondary School, Sandra Nicolson was a teacher who made a lasting difference. Known for her patience, kindness, and unwavering belief in young people, Sandra created a classroom where students felt safe to learn, grow, and be themselves. Her quiet acts of support and encouragement changed lives every day.

Sandra Nicolson passed away in 2024, but her commitment to student well-being continues. In her honour, her family—guided by former colleague and longtime Foundation volunteer Linda Beaven—has established the Sandra Nicolson *Helping Hand Bursary Fund*. The fund supports students who have shown resilience and personal growth in the face of challenges, reflecting the values Sandra championed throughout her career. Since its creation, many others in the community have contributed, ensuring the bursary’s impact will continue to grow.

Discretionary Funds

100 Men Pentiction Legacy Fund
 100 Women Who Care Fund
 1995 Summer Games Legacy
 1996 BC Festival of the Arts Fund
 1 Pentiction Community 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 Pentiction 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
 Kampman Family Fund
 King Kirkpatrick Endowment Fund
 King Kirkpatrick Flow Through Fund
 Lancey Family Fund
 Lan & Pearl Fruno Legacy Fund
 Leonard Futter Fund
 Margaret Neuhaus Fund
 Meiklejohn Family Fund
 MGV Family FT Fund
 Milton Orris Legacy Fund
 MS Anonymous Fund
 Pentiction Public Art Fund
 Princeton Masonic Lodge #95 Legacy Fund
 Providence Funeral Homes Legacy Fund
 Rita Fawcett Memorial Fund
 Rotary Club of Pentiction Legacy Fund
 South Okanagan Cycling Trails Fund
 Summerland Credit Union Fund
 Wood Family Fund

Community Funds

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



Photo: Neighbourhood Small Grants Similkameen 5KM Walk or Run



Photo: Men's Shed Pentiction stand proudly with The Foundation's new boardroom table they built



Photo: Ntamtqen Community Garden & Food Hub, Lower Similkameen Indian Band



Photo: Ntamtqen Community Garden & Food Hub, Lower Similkameen Indian Band



Photo: The Foundation at the Pentiction Farmer's Market

Donor Designated Funds

Bob & Frances Garland Fund
 Brule Windeler Legacy Fund
 Colin & Lois Pritchard Foundation Fund
 Directors Legacy 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 Pankiw Family Fund
 John Sloane Brain Injury Legacy Fund
 Katie Lynn Apgar-Knezacek Fund
 Knights of Pythias Lodge #49 Legacy Fund
 Knights of Pythias Pentiction 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
 Pentiction Children Wellness Fund
 Ryga Festival Society Fund
 South Okanagan Research & Capacity Building Endowment Fund
 SS Sicamoun Marine Heritage Fund
 Toni & Bernie Cattani Legacy Fund for the Arts
 Vance's Camp Boyle Legacy Fund
 Winkelaar Family Fund

Bursary Funds

Alanna Matthew Memorial Fund*
 Belyea Brothers Fund*
 Blanche & Rollo Cecon 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
 Pentiction Women In Business Fund
 Princeton Masonic Lodge #95 Bursary Fund
 Ramada Inn Viticulture Fund
 Richard & Rose Cooper Fund
 Ron & Mary Toews Unger Fund
 Sandra Nicolson "Helping Hand" Memorial Bursary*
 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 and Phil Medical Bursary Fund*
 Weyerhaeuser Legacy Fund

*Delivered through the Foundation's annual Bursary program

Bursary Recipients*

Jaxson Balint
 Rachel Bird
 Jessica Broder
 Cassidy Burns
 Mckenna Burns
 Javier Carlos
 Rowyn Davies
 Mykara Donoghue
 Bonny Lynn Donovan
 Scarlett Ehmman
 Jessie Fleet
 Sadie Fornwald
 Emily Jell
 Puneet Sharma Khudda
 Samuel Kliever
 Lola Massey
 Cassandra Mayhew
 Nathan Millward
 Annika Neill
 Uno Orlik
 Viktoria Quindt
 Nakisa Sanai
 Myla Sanderson
 Jacob Schulting
 Caitlin Schutz
 Mabelle Silva
 Aiden Stefishen
 Camryn Sweeney
 Emma Tarrant
 Jackson Van Raes
 Jackson Vrabel
 YenYue Adora Wong
 Jayda Wood
 Shaurya Yadav

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

Agency Funds

Agur Lake Camp Fund
 Animal Lifeline Emergency Response Team Fund
 BC Schizophrenia Society - Pentiction Fund
 Critteraid Legacy Fund
 The Jim and Gudrun Moore 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 - Pentiction Branch Fund
 Okanagan Symphony Youth Orchestra Endowment Fund
 Oliver & District Heritage Society Fund
 OSNS Legacy Fund
 PDCRS Fund
 Pentiction & District Community Arts Council Fund
 Pentiction Art Gallery Legacy Fund
 Pentiction Public Library Fund
 Pentiction Public Library Staff Education 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

Donor Advised Funds

Amigos de Canada Fund
 Barbara Macdonald Family Fund
 Bjerkan Family Fund
 Bouchard Family FT Fund
 Business Gives Back Fund
 Corbishley Family Flow Through Fund
 Debbie Nelson Fund
 Doreen Olson Healthy Environment Fund
 Greenwood Forest Products Legacy
 Jamieson Family Fund
 Janet Parker Trust Fund
 McBride Family Foundation Fund
 Neil and Shirley Murray Family Fund
 Okanagan Fest-Of-Ale Legacy Fund
 Oliver Rotary Endowment Fund
 Osoyoos Credit Union Community Legacy Fund
 Pankiw Family Fund
 Pat Buschlen Memorial Fund
 Penny Lane Community Legacy Fund
 Pentiction Auto Dealers Fund
 Pentiction Oldtimers Hockey Club Legacy Fund
 Peterson Family Flow Through Fund
 Peterson Family Fund
 Ron Bell & Family Fund
 Sharon Romank Flow Through Fund
 SOSCP Legacy Fund
 Stoof/Straatsma Family Fund
 Summerland Credit Union Legacy Fund
 Susan & Thomas Kelly Fund
 Tining-Sinclair Fund
 Tony & Judy Lloyd Family Fund

100 Men Grant Recipients

Agur Lake Camp Society
 Pentiction and Area Access Centre
 Pentiction and Area Overdose Prevention Society
 Pentiction Men's Shed
 Pentiction Recovery Resource Society
 Princeton Family Services Society
 Queens Park Elementary School
 School District No. 67 (Okanagan Skaha)
 Similkameen Elementary-Secondary School
 South Okanagan Women in Need Society
 United Way British Columbia

100 Women Grant Recipients

Adra Tunnel Restoration Fund
 Alzheimer Society of BC
 Dragonfly Pond Family Society
 NeighbourLink Summerland
 Ntamtqen Community Garden & Food Hub, Lower Similkameen Indian Band
 Pentiction & Area Cycling Association
 Pentiction and District Emergency Program Society
 School District No. 67 (Okanagan Skaha) - Maggie's Lunch Program
 South Okanagan RECOPE Society
 South Okanagan Similkameen Health Care Society
 Starfish Backpack Program
 Ukrainian Nightingale Project

Photo by Jamie Long: BCWF's Watershed Team - 10,000 Wetlands Initiative



Photo: 100 Men Who Care recipients, May, 2025



Grant Recipients

Adra Tunnel Restoration Fund
 Agur Lake Camp Society
 AlleyCats Alliance Society
 Alzheimer Society of BC
 Animal Lifeline Emergency Response Team Society
 Auxiliary to the Penticton Regional Hospital Society
 BC SPCA South Okanagan Similkameen Branch
 BC Wildlife Federation
 Bethel Church Penticton Food Pantry
 BGC Okanagan
 Canadian Alcohol Use Disorder Society
 Canadian Mental Health Association - South Okanagan Similkameen Branch
 Cat's Paw Productions Society
 Cawston Primary School PAC
 Central Okanagan Foundation
 Columbia Valley Community Foundation
 Community Foundation of the North Okanagan
 Cops for Kids Charitable Foundation
 Critteraid Animal Sanctuary
 DB Foundation for Health Research
 Desert Sun Counselling & Resource Centre
 Desert Valley Hospice Society
 District of Summerland
 Downtown Penticton Business Improvement Association
 Dragonfly Pond Family Society
 École Entre-Lacs PAC
 Feedway Foundation
 Friends of the Summerland Research Station Gardens
 Glengarry Figure Skating Club
 Golden & District Community Foundation
 HaHaHa Penticton Kidzfest
 Interior Wildlife Rehabilitation Society
 Jean Minguy Memorial RCMP Youth Academy
 Junior Chamber International Penticton
 Kaleden Community Association
 KANDU - West Kelowna/Kelowna
 Keremeos Young Leaders
 KISU Swim Club
 Lower Similkameen Community Fund
 Lower Similkameen Community Services Society
 Maggie's Lunch Program: Princess Margaret Secondary
 MakeWay Charitable Society
 Naramata Cittaslow Association
 NeighbourLink Summerland
 NK'MIP Desert Heritage Society
 Ntamtqen Community Garden & Food Hub, Lower Similkameen Indian Band
 Oasis United Church Food Cupboard
 Okanagan College Foundation
 Okanagan Nation Family Intervention & Services Society
 Okanagan School of the Arts
 Okanagan Similkameen Conservation Alliance
 Okanagan Similkameen Parks Society
 Okanagan Similkameen Stewardship Society
 Okanagan Symphony Society
 Okanagan Valley Music Festival Society
 Oliver & District Heritage Society
 Oliver Food Bank
 Oliver Rotary Park Improvement Fund
 OneSky Community Resources
 OSNS Child and Youth Development Centre
 Osoyoos Desert Society
 Osprey Community Foundation
 Penticton & Area Cycling Association
 Penticton & District Community Arts Council
 Penticton Academy of Music & Dramatic Arts
 Penticton and Area Access Centre
 Penticton and Area Overdose Prevention Society
 Penticton and District Emergency Program Society
 Penticton Art Gallery
 Penticton Community Fridge and Pantry
 Penticton Concert Band
 Penticton Curling Club
 Penticton Elks Lodge #51
 Penticton Lawn Bowling Club
 Penticton Men's Shed
 Penticton Paddle Sports Association
 Penticton Peach Festival
 Penticton Public Library



Photo courtesy of Tempest Theatre

Penticton Recovery Resource Society
 Penticton Regional Bridge Touranment
 Penticton RollerSkate Society
 Penticton Secondary School
 Penticton Secondary Schools Bursary & Scholarship Foundation
 Penticton Senior's Drop-In Centre Society
 Penticton Soupateria Society
 Penticton Triathlon Club
 Penticton Youth Centre Building Fund
 Phoenix Foundation of the Boundary Communities
 Princeton & District Community Services Society
 Princeton & District Museum and Archives Society
 Princeton Family Services Society
 Princeton Secondary School - Student Awards Program
 Pythian Cerebral Palsy Committee
 Queens Park Elementary School
 Regional District of Okanagan-Similkameen
 Ryga Festival Society
 S.S. Sicamous Marine Heritage Society
 Salvation Army Penticton Family Services & Food Bank
 School District #53 (Okanagan Similkameen)
 School District #67 (Okanagan Skaha)
 Scouts Canada
 Shuswap Community Foundation
 Similkameen Elementary Secondary School
 Skaha Bluffs Park Watch Society
 South Okanagan Immigrant & Community Services
 South Okanagan Loss Society
 South Okanagan Montessori School Society
 South Okanagan Recope 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 Health Care Society
 South Okanagan Similkameen Medical Foundation
 South Okanagan Similkameen Mental Wellness Society
 South Okanagan Similkameen Metis Association
 South Okanagan Similkameen Pride Society
 South Okanagan Women in Need Society
 Starfish Pack Penticton
 Summerland Community Arts Council
 Summerland Food Bank & Resource Centre
 Summerland Museum and Archives Society
 Summerland Youth Centre Society
 Take a Hike Youth Mental Health Foundation
 Tempest Theatre & Film Society
 The Land Conservancy of BC
 The Penti-Con Association
 The Penticton Centre for Exceptional Learning Society
 Town of Oliver
 Town of Osoyoos
 UBC Development & Alumni Engagement
 Ukrainian Nightingale Project
 United Way British Columbia
 Vermillion Forks Metis Association
 Wide Arts National Association
 Wiltse Elementary School
 Wine Country Writers' Festival Society

Staff



Kim English
 Community Relationships Manager



Kelly Helfrich
 Office Administrator



Yuki Ihara
 Donor Services Manager



Aaron McRann
 CEO



Kevin Ronaghan
 Community Investments Manager



Muhammad Usman
 Director of Finance



Jean Wedenig
 Operations Assistant

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 2025 Vital Signs report

Find out more!

Subscribe to our newsletter
 Visit our website: www.cfso.net
 Facebook: [@cfsouthokanagansimilkameen](https://www.facebook.com/cfsouthokanagansimilkameen)
 Instagram: [@cfsos](https://www.instagram.com/cfsos)

Front cover photo courtesy of The Okanagan Food and Innovation Hub

Back cover photo courtesy of Jamie Long of BCWF's Watershed Team, 10,000 Wetlands Initiative

Annual report designed by Valery Gore, Communications Manager

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

GIVING CHOICES. FUNDING CHANGE. IN OUR COMMUNITY.



Please share this Report!
Scan the QR code or go to:
www.cfso.net/reports



 **COMMUNITY
FOUNDATION**
south okanagan | similkameen

101 - 246 Martin Street
Penticton, BC V2A 5K3
info@cfso.net
250-493-9311