



SHUSWAP  
**COMMUNITY**  
FOUNDATION



COMMUNITY  
FOUNDATIONS  
OF CANADA  
*all for community*

# Annual Report 2017/18



# Contents

## Our Mission

- To inspire community giving by providing an opportunity for anyone to leave a lasting legacy through permanent endowment fund building;
- To foster donor confidence and community trust through responsible management and investment;
- To honour the memory of families, community members and loved ones;
- To support community causes and charitable organizations; and
- To provide responsible granting that will enrich life in the Shuswap.

## Our Guiding Principles

In pursuit of its mission, Shuswap Community Foundation will:

- be open, accountable, ethical and socially responsible;
- be a leader in charitable giving;
- strengthen community capacity; and
- respond proactively to community needs.

## SCF Board Of Directors

Dave Wood - President  
Bryan Kassa - Vice President  
John White - Treasurer  
Sharon Gavel - Secretary

Deborah Chapman  
Ineke Hughes  
Kathryn Vennard  
Lindsay Wong

Melany Dyer  
Ralph Segreto  
Gary Brooke  
Paige Hilland

## SCF Staff

Manager: Roger Parenteau  
Administrative Assistant: Paula Shields

## Get In Touch

email: [admin@shuswapfoundation.ca](mailto:admin@shuswapfoundation.ca)  
email: [manager@shuswapfoundation.ca](mailto:manager@shuswapfoundation.ca)  
Call: 250-832-5428  
Shuswap Community Foundation  
Box 624, 102 - 160 Harbourfront Drive NE  
Salmon Arm, B.C., V1E 2V6



From left: Gary Brooke, Dave Wood, Sharon Gavel, Lindsay Wong, Ineke Hughes, Kathryn Vennard, Bryan Kassa, Melany Dyer, Ralph Segreto, Deborah Chapman, Paige Hilland, John White



SHUSWAP  
**COMMUNITY**  
FOUNDATION



# President's Message

2017/18 has seen the continued growth in Shuswap Foundation's Capital Account, both in the value of the portfolio and in the number of funds held by the Foundation. At year end, our investment portfolio was valued at \$9,289,059, up from \$8,887,036 in June of 2018, a gain of \$402,023, and we now have 164 funds in our Capital Fund. Distribution of grants this year will see the Foundation pass the \$2.5 million mark since its inception.

This fiscal year we achieved a return of 7.3%. At year end, our investment performance over the life of the portfolio with Mawer Investment Management was 11.2%.

The Foundation's move to Harbourfront Drive has proven very beneficial, with visitors commenting on how much easier it is to visit our office. When you have an opportunity to visit the new office, you will find access and parking much better.

We are very pleased to welcome Roger Parenteau as our Foundation Manager. Roger has made a big difference in the operation of the Foundation, and has taken on many much needed tasks such as replacing our website, and building a charitable organization/not-for-profit data base which will enable us to increase our granting capacity. He is also investigating software to improve our donor/granting reporting. Anyone who has visited the Foundation office will know Paula Shields, our wonderful Administrative Assistant.

This is my final report as President as I will pass the mantle on to Bryan Kassa at our Annual General Meeting in October 2018. I will continue as a Director. I have enjoyed my time as President, and have had the good fortune of working with a hard-working Board of Directors.

Information about participating in any of our programs and initiatives can be found on our website, [www.shuswapfoundation.ca](http://www.shuswapfoundation.ca) or you may call the office at 250-832-5428. Better yet, drop by and discuss what we do in person. We welcome visitors and enquiries Monday to Friday, 9:30 am –3:30 pm.



Dave Wood, President  
June 30, 2018

## Welcome New Fundholders

Funds established between July 1, 2017 and June 30, 2018.

Allan & Rosemary Wilson



Ralph & Jean Smith

Fund	Supports
Glenn & Judith Borthistle Endowment Fund	Education - School District 83 - Scholarship
Ralph and Jean Smith Endowment Fund	Education - School District 83 - Scholarship
Arts Council South Shuswap Fund	Arts and Culture – South Shuswap
Alan and Rosemary Wilson Preserving Memories Fund	Heritage Preservation - Shuswap
Sharon Besler/Robert Baker Endowment	Education - School District 53 - Okanagan Similkameen - Scholarship



Sharon Besler & Robert Baker  
(Flanked by Dave Wood & Roger Parenteau)



# DISCRETIONARY GRANTS - 2018 SPRING RECIPIENTS

Recipient	Fund	Grant
Shuswap Lifeboat Society <b>Safety Gear</b>	Sheldon & Karen Pukas Family Endowment, Molly Bell Endowment, Community Fund, Ian Duncan & Maureen Stickney Endowment, Lynda Nicholson, Allen Ferguson Endowment, Reid Wright Family Endowment	\$4,800
Shuswap Recreation Society / Shuswap Youth Soccer Association <b>Benches for Blackburn Park</b>	Lloyd & Dorothy Askew Family Endowment, SASCU Youth Endowment, Memorial Walkway Fund, Ulrich & Margarete Schoene Family Endowment, Youth Endowment	\$9,000
Adams River Salmon Society <b>4 interactive computers</b>	Geoff & Judith Benson Family Endowment, Tom & Elsie Brighthouse Family Endowment	\$2,000
BC Tomorrow <b>Online simulator for students</b>	Geoff & Judith Benson Family Endowment, Doreen McCaig Memorial Endowment, Lloyd & Dorothy Askew Family Endowment, Founders Fund	\$2,500
North Shuswap Historical Society <b>Historical Signs</b>	Marian & Ralph Segreto Endowment, Founders Fund, Lloyd & Dorothy Askew Family Endowment	\$2,500
Eagle Valley Senior Citizens Housing Society <b>Deck Renovation</b>	Rod Bailey Endowment, Seniors Project Fund, C. Norman Barber Endowment, Maurice Gillis Memorial Endowment, Eagle Valley Communities Endowment, Kylo Family Endowment, Anon. Eagle Valley Seniors Endowment	\$8,000
School District 83 / Hillcrest PAC <b>Playground for Hillcrest School</b>	Joe & Bobbi Johnson Schools Legacy, Wainwright Mobley Memorial Endowment, Brooke Jackson Downs Endowment, Ulrich & Margarete Schoene Family Endowment, Brooke Downs Vennard LLP Endowment	\$10,000
Literacy Alliance of the Shuswap <b>Gap R&amp;P – Summer slide Program</b>	Wainwright Mobley Memorial Endowment	\$5,000
Neighbourlink <b>Purchase 52 ft storage container</b>	Doreen McCaig Memorial Endowment, Albert & Muriel Spencley Endowment, Earl & Muriel McKenzie Family Endowment, Community Fund, Wendy and Rod Charlebois Endowment	\$7,000
Shuswap Area Family Emergency Society <b>Visual &amp; Audio upgrade for children</b>	Nina Dickins Family Endowment, Dave Wood Jean Bleakley Endowment	\$1,400
R.J. Haney Heritage Village & Museum <b>Install work stations &amp; shelves at Montebello Museum</b>	Chapman Family Endowment, Gordon & Bev Marshall Family Endowment, Pat & Peter Cummings/George & Eva Kassa/Patti & Bryan Kassa Endowment, Lloyd & Dorothy Askew Family Endowment	\$7,000
Shuswap District Arts Council / Shuswap Association of Writers <b>Word on the Lake Writer's Festival</b>	Geoff & Judith Benson Family Endowment	\$3,000
Shuswap Children's Association <b>Children's Program Equipment</b>	Jennifer Phillips Memorial Endowment	\$1,600
Shuswap Daycare Society <b>Kitchen Renovations</b>	Jennifer Phillips Memorial Endowment, Community Fund, Dave Neale Memorial & Trinity Neale Endowment	\$3,000
Shuswap District Arts Council <b>Shuswap Legends</b>	Edna & Dan MacQuarrie Endowment, Howard Johnston Endowment, Gordon Priestman Memorial Endowment, Marian & Ralph Segreto Endowment	\$2,000
Shuswap Hospice Society <b>Waiting room furniture</b>	Paul & Elvi Pukas Family Endowment, Memorial Walkway Fund	\$2,700
Shuswap Music Festival <b>Venue piano tuning and moving</b>	Geoff & Judith Benson Family Endowment, Landers Family Legacy	\$1,500
Aspiral Youth Partners Association - Voice of the Shuswap <b>Documentary of the Dragon Boats</b>	Geoff & Judith Benson Family Endowment	\$4,800
Sorrento Drop in Society <b>Purchase AED Machine</b>	Sorrento Lions Club/Catherine Dilworth Endowment	\$1,450
Cedar Heights Sorrento /Sorrento & District Housing Society <b>Parking Lot Paving Project</b>	Sorrento Lions Club/Catherine Dilworth Endowment	\$2,355

# Funder Profile - Gordon Priestman

August 4, 1936 - August 4, 2003

For more than three decades Gordon Priestman documented the events and people that shaped Salmon Arm while producing work of the highest journalistic quality. With his full beard and piercing eyes, he was instantly recognizable - the very image of the dignified newspaper editor.

Gord was a true friend of Salmon Arm. He observed, and loved to chat with, people, then shared his experiences with the community and gave needed perspective. He called on residents to live with integrity and honour; challenged those in power; spoke for those without a voice and above all treasured free speech and encouraged debate.

Born and raised in Ontario, Gord moved to BC in 1964 and began his career in journalism, coming to Salmon Arm in 1967 to become the editor of the Salmon Arm Observer, a position he held for 33 years. A lifelong social democrat, he took a leave of absence to run for the NDP in the 1996 provincial election. He then returned to the Observer, retiring for health reasons in December, 1998.

Gordon was always interested in the arts—writing, music and painting. He loved the outdoors, including camping, canoeing and observing nature. Until his middle years he was active in a number of sports. He was involved with numerous local organizations, was a member of the Salmar Community Association, and a life member of the Fall Fair Society. When he died in 2003, he was serving his second term as a Director of Shuswap Community Foundation. It was Gord who suggested the Foundation's former motto, "Promises for Tomorrow."

The Gordon Priestman Memorial Endowment has been established and is open to all donations. Proceeds from the fund will be disbursed at the discretion of the Foundation's directors in support of community projects, thus ensuring Gord's legacy for all the tomorrows to come.

Please visit our website for the complete story at [shuswapfoundation.ca](http://shuswapfoundation.ca)



## Franks for the Foundation - Double Your Donation

Friends and supporters of the Shuswap Community Foundation have the unique opportunity each August to have their donation matched by the Scotiabank Team Community Program. Organized and hosted by the Papworth Team of Scotia Wealth Management the annual Franks for the Foundation Charity Hot Dog Sale raises funds for Shuswap Community Foundation. Shuswap Community Foundation supports non-profits and charities throughout the Shuswap through its spring and fall grant cycles. All donations to the Shuswap Community Foundation are reinvested in our communities supporting seniors, children and youth, education, health, sports and recreation, and the environment. Since its inception in 1994 Shuswap Community Foundation has invested over \$2,500,000 in Shuswap Communities.





# Discretionary Grants - 2018 Fall Recipients

Recipient	Fund	Grant
Caravan Farm Theatre <b>Gazebo Restoration</b>	Higgins Family Fund, Brooke, Jackson, Downs Endowment, Brooke, Downs, Vennard LLP Endowment, Doreen McCaig Memorial Endowment	\$3,000
Eagle Valley Community Support Centre <b>Community Support Centre Lighting Upgrade</b>	John and Ingrid Monk Endowment, White / Johnson Endowment, Founders Fund	\$4,000
Kamloops Symphony <b>Salmon Arm Concert Series</b>	Enid Finn Memorial Fund, Klein Family Endowment, Garry & Mary Landers Endowment, Letham Family Endowment	\$2,500
Malakwa Community Centre <b>Paint Community Centre</b>	Nancy & George Clarke Fund, Kylo Family Endowment, Marian & Ralph Segreto Endowment, Fred and Alice Duck Endowment, Rod Bailey Endowment, Maurice Gillis Memorial Endowment, Anon. Eagle Valley Seniors Fund, Eagle Valley Communities Endowment, Doreen McCaig Memorial Endowment, White / Johnson Endowment, Derkaz & Derby Family Endowment, Molly Bell Endowment	\$6,000
Neskonlith Indian Band <b>Secwepemc Plant Knowledge Project</b>	Wendy & Rod Charlebois Endowment, Bill & Mary Douhaniuk Endowment, Edna & Dan MacQuarrie Family Endowment, Chapman Family Fund, Derkaz Derby Family Endowment, Albert and Muriel Spencely Endowment	\$4,100
North Shuswap Parent Advisory Council <b>School Sports Scoreboard</b>	SASCU Youth Endowment, Derkaz & Derby Family Endowment, Jennifer Phillips Memorial, Youth Endowment	\$5,500
NOSBIS <b>Fridge</b>	Doreen McCaig Memorial Endowment	\$1,055
RCAC 222 <b>Equipment Storage</b>	SCF President's serendipity award	\$250
SABNES <b>Education Program: Songbird Habitat</b>	Tom & Elsie Brighthouse Family Endowment, Paul and Jane Burrows Endowment, Gary W. Carder Endowment, Potter Edgell Family Endowment	\$3,000
Seniors 5th Ave Activity Centre Ass'n / Shuswap Lawn Bowling <b>Greens Roller</b>	Seniors Project Fund, C. Norman Barber Endowment, White / Johnson Endowment	\$4,000
Sicamous and District Seniors Centre Society <b>Dinnerware for Seniors</b>	John and Ingrid Monk Endowment	\$1,500
Shuswap Hut and Trail Alliance <b>Shuswap Alpine Trail Planning &amp; Upgrades</b>	Robin Jackson Environmental Fund, Tom Pugh Memorial Fund, Carson/Murray Endowment, Ian & Wendy Clay Endowment, Klein Family Endowment, Potter Edgell Family Endowment	\$2,500
Shuswap Lifeboat Society <b>Drawing Plans for Training Centre</b>	Shuswap Training & Coordinating Society Endowment, Rick & Linda Hirtle Endowment, Marion & Ralph Segreto Endowment, Catherine & Joseph Shay Memorial Endowment, Nancy & George Clarke Endowment, Dr. Tess Trueman Endowment, Dave Wood & Jean Bleakley Endowment	\$13,000
Shuswap Theatre Society <b>Theatre Lighting Upgrade</b>	Gerry & Rita Chu Family Endowment, Klein Family Endowment, Aileen Gentles Memorial Endowment	\$2,195
Sorrento Drop-in Society <b>Piano</b>	Sorrento Lions Club/Catherine Dilworth Endowment	\$3,000
Turtle Valley Donkey Refuge Society <b>Generator</b>	Nina Dickens Family Endowment, Doreen McCaig Memorial Endowment, Margot Hewitt, Dr. Melany Dyer Endowment, Rosemarie's Fund, Sorrento Lion's Club / Catherine Dilworth Endowment	\$6,000

# Funder Profile - Allan and Rosemary Wilson

*"...Allan carries on the work that they both found so fulfilling."*

Through love of the Shuswap community, demonstrated by decades of volunteer work, both Allan and Rosemary Wilson exemplify what it means to be a Community Champion: a person who identifies a need in his or her community and works in whatever way he or she can to contribute to the growth of that community and the support of its residents.



Allan and Rosemary were married in 1968, and moved to Tappen in 1969. This was the start of a life journey together built on love, and a shared interest in history and community building. Rosemary held down the fort at home, running the family farm and eventually raising as many as 35 sows, while Allan worked as a mechanic at the Federated Co-op sawmill in Canoe. Their two children, Mae and Philip, were born in 1971 and 1975, respectively.

Rosemary, who passed away in 2017, was an active member of the Shuswap community whose lifetime contributions continue to benefit residents of the Shuswap. Allan carries on the work that they both found so fulfilling. If you meet him, you will learn that he is a fountain of information, and he will regale you with stories that leave you laughing, and feeling lucky to call the Shuswap community home.

Having worked tirelessly with the Tappen Co-op, the Okanagan Historical Society, and R.J. Haney Heritage Village and Museum both Allan and Rosemary had an insider's knowledge of the resources required to ensure these organizations could carry out their mandate. Shuswap Community Foundation is grateful to Allan and the late Rosemary Wilson for their generous donation establishing the Allan and Rosemary Wilson Preserving Memories Fund that will benefit residents of the Shuswap for a very long time to come.

Income from the Fund will be disbursed annually to award one or more grants to charitable organizations operating in the Shuswap area, providing funds for:

- purchasing archival supplies for museums located in the Shuswap area, including Salmon Arm, Sicamous, North Shuswap, and Falkland;
- Maintaining or enhancing the Tappen Cemetery;
- Researching and writing historical accounts of the Shuswap area.

The fund welcomes donations at any time.

Please visit our website for the complete story at [shuswapfoundation.ca](http://shuswapfoundation.ca)

## Project Profile - Caravan Farm Theatre

"Thanks to the generous funding support from Shuswap Community Foundation, cast and crew at Caravan Farm Theatre are eating well, sleeping better, and working under safer conditions.

Recent grants have helped to deliver irrigation to the farm's bountiful garden, install a catwalk for the lighting team so that they don't have to leap across rafters, and build two new outdoor sleeping platforms. New funds will go to much-needed repairs for the beloved Gazebo stage.

This 'behind-the-scenes' support ensures better performances up front for audiences, and is a vital investment in ensuring the continued cultural and economic legacy of the Caravan Farm Theatre to the benefit of our surrounding communities. We take a collective bow to Shuswap Community Foundation.

Thank you so much!"

~ Teresa Marshall, Chair, Caravan Farm Theatre Society



Estelle Shook & Tom Preston



# 2017 DONOR DIRECTED GRANTS

Fund	Grant	Recipients
Al Neale Bursary	\$6,194	Daniel Wood, Loretta Eustache, Maylee Weeks, , Raymond Hubscher, Relan Johanson, Sharlene Neville, Shaunte! Nash, William Wong
Beryl Herdan and Al Neale Endowment (CMHA)	\$864	Canadian Mental Health Association Shuswap/Revelstoke
Bill and Mary Douhaniuk Memorial	\$1,389	Shuswap Hospital Foundation
Bill and Peggy Kernaghan Family Endowment	\$91	Earnings reinvested
Bill MacDonald Memorial	\$636	Canadian Cancer Society
Braby Family Endowment	\$402	First United Church
Brad Jackson Scholarship	\$877	Aaron Plessis
Bruce Hall Memorial Endowment	\$112	Earnings reinvested
CMHA - Revelstoke Shuswap	\$863	CMHA Shuswap
Centennial Reunion Scholarship	\$312	Casey Bourassa
Clara Anderson Endowment	\$333	Earnings reinvested
Class '77 - David MacKay Memorial Endowment	\$370	Earnings reinvested
David John Stratton Memorial Bursary	\$588	Beth Ralston
Dearing Family Endowment	\$891	Athletics- School District #83
Denis Marshall and Geoff Leech Memorial Endowment	\$381	Okanagan Historical Society
Dorothy Longdo Memorial	\$5,309	Lawrence Moren
Doug and Donna Adams Museum Endowment	\$34	Earnings reinvested
Douglas Burkitt Memorial	\$571	Shuswap Hospital Foundation
Elisabeth Thomi Endowment	\$55,461	Shuswap Branch BCSPCA
Eve and Christopher Wright Scholarship	\$637	Taylor Regier
Fowler/Gomme Family Endowment	\$1,304	Shuswap Music Festival - Elise Parsonage
Frank and Rita Smuin Memorial Bursary	\$957	Cassie Piekarczyk
Glenn & Judith Borthistle Endowment	\$62	Earnings reinvested
Gordon Mackie Endowment	\$40	Earnings reinvested
Henderson Award in International Development	\$2,578	UBC - Dinesh Adhikary
Jack and Edith Stead Endowment	\$1,949	Salmon Arm Museum
Jack and Edith Stead Hospital Endowment	\$440	Shuswap Hospital Foundation
Janet Pattinson - Shuswap Naturalist Club Bursary	\$1,097	Thompson Rivers University
Jean & Ralph Smith Scholarship	\$461	Earnings reinvested
Julia/Fred Endowment	\$1,844	Earnings reinvested
Lisa Rolland Children's Literacy	\$875	School District #83
Lloyd and Joy Johnston Family Endowment	\$2,777	Shuswap Hospital Foundation
Lloyd and Joy Johnston Family Endowment	\$2,777	Shuswap Recreation Society
Loretta Zinck Greenough Endowment	\$15	Earnings reinvested
Loyola Elliott Bursary	\$311	Earnings reinvested
Marie Manson Memorial Art Award	\$1,560	Alex Dobson, Lisa Figueroa
Morris Bursary Fund for Excellence in Mathematics	\$2,260	Allie Landy
Nayki/Greer Family Endowment	\$1,870	BC SPCA
Nayki/Greer Family Endowment	\$1,870	Lyndsey Chesham
Nick and Marilyn Brown Family	\$1,204	Holly Malaschewsky
Porteous/Mullen Bursary Endowment	\$1,350	Elijah Leversedge, Roderik Butts
Ready Family Endowment	\$736	Shuswap Hospice Society
Ready Family Endowment	\$736	Shuswap Area Family Emergency Society
Salmon Arm Kinsmen and Kinette Fund	\$2,023	Allie Landy
Salmon Arm Secondary Athletic Endowment	\$1,484	SD83
Sansom Family Endowment Fund	\$342	Earnings reinvested
Shane Gerner Memorial Endowment	\$927	Claire Hall
Sharon Besler and Robert Barker Endowment	\$122	Earnings reinvested
Shuswap Branch, B.C.S.P.C.A. Endowment	\$4,405	Shuswap Branch BCSPCA
Shuswap Volunteer Firemen's Association – Cody Davies Memorial Bursary	\$679	Reese Richardson
Steve Heal Memorial Scholarship	\$703	Alex Delaney
Susan Latimer Bursary	\$49	Earnings reinvested
Tom Brush Memorial Scholarship	\$664	Steve Rahn
Tomas Idzan Memorial Bursary	\$600	Skyler Coulson
Walter Ellaschuk Memorial Bursary	\$1,459	Michael Jmio, Adam Berls, Sarah DeHoog
Wayne Williamson Memorial	\$273	Earnings reinvested



# Funder Profile - Fred and Alice Duck

In 1991, on the July long weekend, Fred and Alice Duck became residents of Sicamous, BC, where Fred took up his position as the United Church Lay Pastoral Minister. He retired in 2004.

Fred and Alice met on a blind date. Alice told her best friend, "His name is Fred Duck, and if I marry him, I'll be A. Duck for the rest of my life. – ain't gonna happen." Well it did, on June 24, 1977. They've had lots of fun with the name over the years. In Kamloops they lived on Chukar Drive, with neighbours John and Jean Crowe, and Della and Jerry Swallow.

Once settled in their new home in Sicamous, they became very involved in their new Shuswap community. Alice is a founding board member of the Eagle Valley Community Support Centre, sat on the board of directors of SASCU for 16 years, was a director on the board of Shuswap Community Foundation for 15 years, and is currently on the board of the Salmon Arm Hospice Society. Fred is the Sicamous Legion Chaplain, a past president of Salmon Arm Hospice Society, and is currently actively involved with the Royal Canadian Marine Search & Rescue, stationed in Sicamous. They are both past presidents of Probus Shuswap. Both volunteer in the very successful Sicamous United Church Thrift Store where you will find them every Wednesday morning.

Alice and Fred have each left a legacy gift to Shuswap Community Foundation in their wills, but when they learned of the opportunity to open an endowment fund via the foundation's 'Matching Funds' program, they took it. They decided to do this because, as Fred said, "We've been lucky in our lives and don't want for anything. We want to help support a strong financial foundation for the future of SCF, in perpetuity." Alice added, "We did it because it's a good thing to do, and the foundation is the perfect vehicle to give back to Shuswap communities in the areas most needed."

Fred and Alice welcome donations into their fund at any time, for any occasion.

Please visit our website for the complete story at [shuswapfoundation.ca](http://shuswapfoundation.ca)



*If you don't thrift shop, you're a damn fool. It's good stewardship.*  
– Fred

## Project Profile - Shuswap Theatre

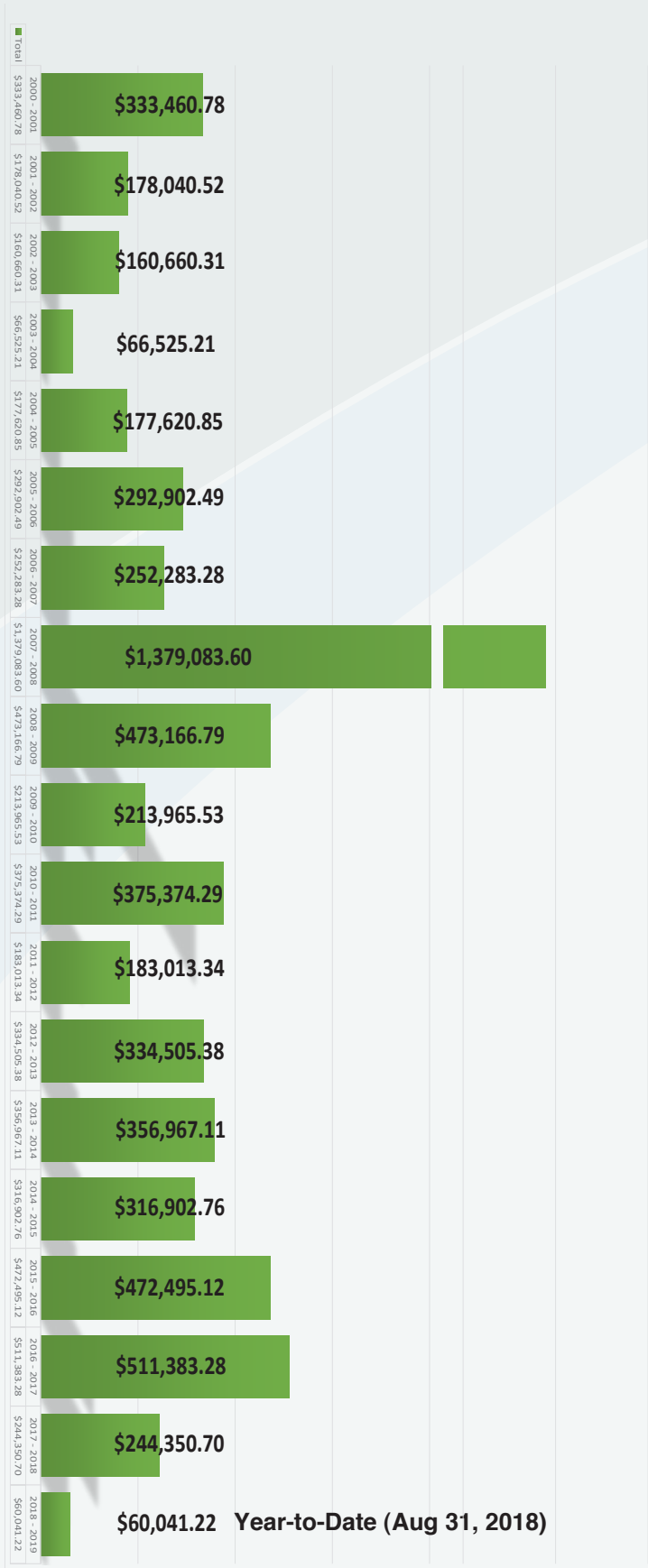
"During the past year the Shuswap Community Foundation donated \$10,000 to the purchase of the new seats for Shuswap Theatre. Without the first donation from this wonderful community resource the new seats project would not have gone ahead. That first donation of \$5,000 made it seem possible to raise the \$39,000 needed for the successful completion of this project. We are grateful for the continued support of the Foundation."

Joyce Henderson, Shuswap Theatre



# Financial

## SCF Donations year-to-year since 2000



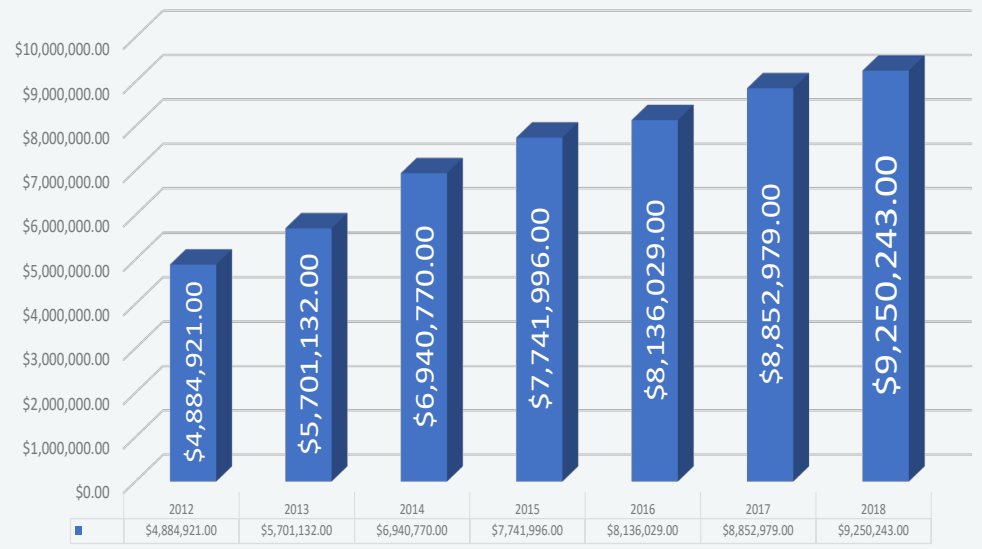
Revenue	
Endowment Fund:	
Investment Income	
Donations	
CFC Grant	
Total Endowment Fund Revenue	
Administration:	
Admin. Fee. - Capital	
Admin Fee. - Memorial Walkway	
Corporate Donations	
Vital Signs	
Total Administration Revenue	
City of Salmon Arm Trust	
Donations	
Investment Income	
Total City of Salmon Arm Revenue	
District of Sicamous Trust	
Donations	
Investment Income	
Total District of Sicamous Revenue	
Total Revenue	
Operational Expenses	
Endowment Fund:	
Administration Fee	
Discretionary Manager Fee	
Total Endowment Fund Expenses	
Administration:	
Administration Costs	
Admin. Fee - Memorial Walkway	
Vital Signs Expenses	
Total Administration Expenses:	
Total Operational Expenses:	
Revenue over expenses before Grants	
Grants:	
Life Insurance Costs	
Grants - SCF	
Total Grants and Insurance Costs - SCF	
Grants - City of Salmon Arm (Trust)	
Grants - District of Sicamous (Trust)	
Total Grants and Insurance Costs - SCF	
Net Revenue	
Total Fund Balances July 1, 2016	
Total Fund Balances * June 30, 2017	

Note: This is an unreviewed summary of the Foundation's Financial position as of June 30, 2017.

# Report

## SCF Capital Fund Growth

2018	2017
\$660,213.00	\$743,128.00
\$246,626.00	\$447,700.00
\$0.00	\$8,050.00
<b>\$906,839.00</b>	<b>\$1,198,878.00</b>
\$97,085.00	\$78,098.00
\$6,655.00	\$12,806.00
\$5,300.00	\$8,500.00
<b>\$119,249.00</b>	<b>\$99,404.00</b>
\$62,500.00	\$57,500.00
\$201.00	\$105.00
<b>\$62,701.00</b>	<b>\$57,605.00</b>
\$42,000.00	\$41,000.00
\$116.00	\$43.00
<b>\$42,116.00</b>	<b>\$41,043.00</b>
<b>\$1,130,905.00</b>	<b>\$1,396,930.00</b>
\$97,085.00	\$78,098.00
\$44,924.00	\$38,759.00
<b>\$142,009.00</b>	<b>\$116,857.00</b>
\$125,287.00	\$91,220.00
\$2,819.00	\$2,242.00
<b>\$128,106.00</b>	<b>\$93,462.00</b>
<b>\$275,740.00</b>	<b>\$210,319.00</b>
\$855,165.00	\$1,186,611.00
\$2,500.00	\$2,108.00
\$364,882.00	\$363,146.00
\$51,642.00	\$54,350.00
\$36,875.00	\$40,000.00
\$453,399.00	\$457,496.00
\$399,266.00	\$727,007.00
<b>\$8,901,908.00</b>	<b>\$8,174,904.00</b>
<b>\$9,301,174.00</b>	<b>\$8,901,910.00</b>



	2018	2017
<b>Assets</b>		
<b>Current Assets</b>	<b>\$59,735.00</b>	<b>\$272,301.00</b>
Cash and Cash Equivalents	<u><b>\$1,175.00</b></u>	<u>\$909.00</u>
	<b>\$60,910.00</b>	<b>\$273,210.00</b>
<b>Investments</b>	<u><b>\$9,258,344.00</b></u>	<u>\$8,646,190.00</u>
	<u><b>\$9,319,254.00</b></u>	<u>\$8,919,400.00</u>
<b>LIABILITIES AND ASSETS</b>		
<b>LIABILITIES</b>		
Accounts Payable	<b>\$21,031.00</b>	\$15,993.00
Government Remittances payable	<b>\$1,518.00</b>	-
Unearned Revenue	-	\$1,500.00
Funds held on behalf of third parties	<u><b>\$12,748.00</b></u>	<u>\$6,541.00</u>
	<u><b>\$35,297.00</b></u>	<u>\$24,034.00</u>
<b>FUND BALANCES</b>		
Endowed funds	<b>\$9,250,243.00</b>	\$8,852,795.00
Unrestricted net assets	<u><b>\$33,714.00</b></u>	<u>\$42,571.00</u>
	<u><b>\$9,283,957.00</b></u>	<u>\$8,895,366.00</u>
	<u><b>\$9,319,254.00</b></u>	<u>\$8,919,400.00</u>

of Shuswap Community  
ine 30, 2018.



# Funder Profile - Al Neale & Beryl Herdan

Al Neale and Beryl Herdan couldn't think of a better way to express their gratitude. Their endowment funds to the Canadian Mental Health Association (CHMA) were established with two goals in mind:



- to support operational costs of the organization and;
- to support families who have a loved one suffering with mental health issues.

Beryl has a daughter and a grandson who live day by day with bipolar disorder, and Al has an adopted daughter who suffers from fetal alcohol syndrome. The support they have received over the years from CHMA gave them strategies to help their relationships with their children. "We got to know as much as we could about mental health to help us understand it," says Al.

For Beryl, CHMA helped her see beyond her daughter's mental illness and appreciate who she is as a person, and to view things from her daughter's point of view. "I just loved that girl and I could see the positive and the creative. They helped me to understand the illness.

Their effort to connect with loved ones, to learn about mental illness and how to deal with it, was a bond that strengthened Al's and Beryl's relationship. Both had lost their spouses and moved to the Shuswap in the late 70s. "In Calgary I was always in a shell. When I came out here and met people in Cedar Heights it was like a big family," says Al.

Beryl had moved to Salmon Arm, where she met her second husband, Rudi. After he passed away Beryl met Al. Soon they were enjoying each other's company and becoming very engaged in the community: square dancing, singing, acting, attending the local story-telling group, and the historical society.

For Beryl and Al, knowing their gift will help other families live life to the fullest is a legacy they're proud to leave. "I can sympathize with the person who is an alcoholic or a person with mental health issues. They don't get up in the morning and say, 'I'm going to be an alcoholic' or 'I'm going to be a person with mental health issues today,'" says Beryl. "We can't do anything but learn more about it and be compassionate."

As CHMA gave them the tools they needed, so their gifts will help other families flourish regardless of mental health problems.

Please visit our website for the complete story at [shuswapfoundation.ca](http://shuswapfoundation.ca)

## Project Profile - Canadian Mental Health

**"When families are strong and supported the outcome is always improved"**

As advocates for CMHA, Al and Beryl have been tireless supporters of families as they face challenges when a loved one is living with mental health issues. Through support from their Endowment Fund, CMHA has been able to promote awareness throughout the community that there are family support services available, as well as respond to the needs of families in crisis, ensuring that families receive the help they need.

When families are supported, the bond to the community is strengthened and lives are improved.

We are all grateful to Al and Beryl for their continued support and dedication to Mental Health for all.



Canadian Mental  
Health Association

# Agency Funds

Fund	Donations	Market Value
Administration Endowment	\$68,415.02	\$100,850.53
Anglican Parish of Salmon Arm - Sicamous Endowment	\$23,017.00	\$31,259.94
Arts Council of the South Shuswap	\$8,300.00	\$8,827.31
Caravan Farm Theatre Endowment	\$2,609.00	\$2,727.34
City of Salmon Arm Endowment	\$188,498.61	\$258,487.65
Seniors Resource Centre - Fletcher Park Endowment	\$26,412.75	\$30,885.14
North Okanagan-Shuswap School District Endowment	\$53,835.00	\$88,074.61
Okanagan College Foundation	\$100,000.00	\$163,007.27
Okanagan Regional Library (Shuswap) Endowment	\$5,367.00	\$5,983.24
Royal Canadian Air Cadet 222 Shuswap Squadron Endowment	\$4,587.00	\$4,980.55
SABNES Endowment	\$14,211.25	\$16,242.58
SAFE Society Endowment	\$11,475.00	\$17,118.16
Salmon Arm College Scholarship Trust - George and Nancy Clark	\$77,340.10	\$127,041.78
Salmon Arm College Scholarship Trust - Len O'Neill Memorial	\$69,366.00	\$109,571.52
Salmon Arm College Scholarship Trust - Vicki Hitchen Memorial	\$60,764.00	\$101,600.53
Salmon Arm Museum and Heritage Association - Peterson Family	\$53,887.00	\$80,226.97
Salmon Arm Museum and Heritage Association Endowment	\$121,616.00	\$186,067.95
Shuswap Art Gallery Association Endowment	\$309,696.36	\$487,897.15
Shuswap District Arts Council Endowment	\$40,569.00	\$62,203.61
Shuswap District Arts Council Endowment - Blair Borden Memorial	\$25,235.00	\$40,628.00
Shuswap District Arts Council Endowment -T.O.N.A.C.	\$5,026.00	\$8,551.30
Shuswap Hospice Society Endowment	\$32,027.00	\$50,538.95
Shuswap Hospital Foundation Endowment	\$29,038.64	\$38,818.19
Shuswap Theatre Society Endowment	\$43,119.54	\$46,725.39
Sorrento and Area Community Health Centre	\$14,100.00	\$16,202.71
The Shuswap Trail Legacy Fund	\$44,313.55	\$47,649.03
	<b>\$1,432,825.82</b>	<b>\$2,132,167.42</b>

## Agency Fund Profile - Arts Council of the South Shuswap

In late 2017, the Arts Council for the South Shuswap hosted board members from Shuswap Community Foundation to gather information on creating an Endowment. Just ten months later, the council opened its fund, which now sits in excess of \$13,000.00; a good start towards sustainability.

Several years ago, the Shuswap Lake Festival of the Arts and the South Shuswap Children's Theatre Society joined together to form the Council. The Council's vision, to create a rich, social fabric for the communities of the Shuswap through engagement in arts, aligns closely with the mission of the Foundation.

Both organizations are committed to ensuring that the Arts are supported and promoted throughout the region. Grants from the Foundation, made possible by the generosity of our donors, have helped fund several Arts Council projects, including:

- A community stage
- The purchase of a sound system
- The Children's Theatre Production Festival
- The re-establishment of the Sorrento's Festival of the Arts

With over 120 members, the Arts Council for the South Shuswap has become the hub for information on cultural projects, activities, facilities, and a resource for artists.

The Arts Council for the South Shuswap Endowment is an easy way for community members to show their support for the Arts by donating directly to this Fund.



# Manager's Message

It has been a very busy year since I took on the role of Manager of Shuswap Community Foundation. Fortunately, I have received a great deal of guidance from Paula Shields in navigating the ins and outs of this organization, as well as tremendous support from the board of directors.



Two of the key objectives that the board has set out are to better inform people throughout the Shuswap about the important role that a community foundation can play in building better communities, and reinforcing the connections that we have with our existing fund holders and partners.

With these objectives in mind, in June of this year we held an open house at our SCF offices to say "thank you" to everyone who has helped support the Foundation, and bring together our fund holders with some of the

organizations that benefit from their

generosity. Also, in June Paula and I undertook the production of the first "fund update letter" to all 164 of our fund holders. The purpose of this mail out was to give greater transparency to what the Foundation does, and better connect our funders with the great work that is being done in the Shuswap with their gifts. If you did not receive your fund update letter, please contact Paula or me.

As the father of two young children, I am well aware that the best way to connect with the future of our community is through our youth. To this end, Paige Hilland and I have been working to bring youth in the community together in a Youth Philanthropy Advisory Committee (YPAC). Working with middle and high school students, we want to bring together youth from throughout the region to better inform the decisions that the foundation makes concerning projects and organizations that benefit youth.



The Foundation is about connecting people with the causes they care about. Our new website will make it easy to connect with us, and will give relevant information to funders and grant applicants alike. Whether you wish to track the quarterly performance of your individual fund or fill out an on-line grant application, the website will make that as easy as possible for you.

I look forward with anticipation to the work of continuing the building of strong, sustainable communities in the Shuswap.



Roger Parenteau, Manager  
Shuswap Community Foundation

## Project Profile - North Shuswap PAC



The parents, staff and students of North Shuswap School are thrilled that the Shuswap Community Foundation has by their generosity enabled us to purchase a new wireless scoreboard for our school. We are all super excited to be able to host league games at our school, not only saving parents long drives to other district schools, but to be able to showcase our school and area as well to other students and parents. Thank you so much!

Angela Simpson  
North Shuswap – Parents Advisory Council



# Funder Profile - Gary W. Carder



According to Gary Carder, there are three ways to get things done: the right way, a different way, or Gary's way. His way resulted in a long and very satisfying career with the Department of Fisheries and Oceans as a Biological Sciences Technician. A three-month position ended up lasting 25 years.

Working out of the Freshwater Institute on the campus of the University of Manitoba, he spent his summers in the NWT and Nunavut. The winter months were, thankfully, spent indoors at the institute, determining the age of the fish and publishing data. His reports can be read on DFO's website.

Gary retired in 1996 and came to live with his mother in Salmon Arm, in the home they had built together in 1981. He continued to work as a fish aging consultant from his home office until 2012, when he retired from the field.

A member of the Salmon Arm Rotary Club since 1998, Gary is also a member of the Shuswap Naturalist Club, and a life member of SABNES.

The Gary W. Carder Endowment Fund is a legacy fund which will receive a further bequest at the time of his death. Grants from the fund will be given to applications which:

- provide support for adults with physical disabilities;
- benefit the environment, including support for the Salmon Arm Bay Nature Enhancement Society and Shuswap Hut and Trail Alliance Society, or their successors, or other like-minded organizations; and
- benefit the homeless and other disadvantaged people, including support for The Salvation Army, or its successor, or any other like-minded organization.

Donations to the fund from others who share Gary's interests are welcome at any time.

Please visit our website for the complete story at [shuswapfoundation.ca](http://shuswapfoundation.ca)

## Project Profile - Royal Canadian Marine Search & Rescue

The Shuswap Community Foundation was one of the very first supporters of the Kids Don't Float program that provides loaner life-jackets for kids on the water. The Foundation has been integral in providing funds to keep our members safe while performing missions on the water. The latest rescue vests and helmets enable our volunteers to complete their tasks with confidence and security, as well the Foundation has stepped forward to support us in the design phase of a boathouse and rescue training centre. Through Shuswap Community Foundation support, RCMSAR 106 (Shuswap) is able to respond to emergencies on Shuswap and Mara Lakes professionally and efficiently.

Rob Sutherland  
Royal Canadian Marine Search and Rescue Station Leader  
Shuswap Station 106





# McGuire Lake Memorial Walkway



Bricks Purchased July 1, 2017 to June 30, 2018

Donor	Celebrate/Memorial	Memorial Brick
Stuart & Judith-Ann Kassa	Marriage of Stuart & Judith Kassa	"Forever Laughing at Heart - Best Dad Ever" "A Forever Friend Always – Best Mom Ever"
Jack and Edith Stead	Marriage of Jack & Edith Stead	"65 <sup>th</sup> Wedding Anniversary"
Diane Miller	Isolde Frick	"Gone but not forgotten always loved"
Allison Graham	John Graham	"52 years of love and happy memories"
Estate of Ethel Graham	Guy & Ethel Graham	"Remembered in the hearts of many"
Julia Flatman	Ron Flatman	"60 loving years together"
Tim Rioux	Susan Adele Rioux	"So Loved by All and Eternally Remembered"
Edith Deman	Harold Scheffellaier	"In loving memory of my brother Harold Scheffellaier"
Ineke Hughes	Hank & Klaasje van Geuns	"Together again, dancing amongst the stars."
Mary Ann Goerzen	Martin D. Goerzen	"Lived- Laughed - Love."
Tom Brighthouse	Elsie Brighthouse	"Beloved Wife, Mother, Teacher and Counsellor"
Aiko Nakagawa	Mike & Aiko Nakagawa	"Forever loved by family and friends."

# 2017/18 Individual Donors

Angeline Agassiz	Catherine Gillick	Douglas & Doriane Monk
Freda Aitken	Mary Ann Goerzen	Robert L. Morris
David & Janet Aitken	Joy Gothard	Jack Mowers
Clara Anderson	Alison Graham	Allan & Patricia Munholland
Sharon Baker	Loretta Greenough	Aiko Nakagawa
James & Marcia Beckner	Steve Guidone & Jacalyn Greenhough	Lynda Nicholson & Allen Ferguson
Judy & Vick Birkhiem	John & Joyce Henderson	Joan Oben
Donna & David Booth	Rick & Linda Hirtle	Anne Olson
Glenn & Judith Borthistle	Don Hobsbawn	James & Patricia Park
Caroline Brear	Ineke Hughes	Janet Pattinson
Tom Brighthouse	Kaitlan Hunter	Kevin Pearson
Gary Brooke & Sunni Berger	Brenda Hunter	Jos Penner
Marilyn Brown	Gudrun Hupfauer	Mickey Petersen
Brian Browning	Tove Jensen	William & Alice Phillips
Kim Buker	Cleora Jones	Richard Preston
Linda Buker	Stuart & Judith -Ann Kaasa	William Pringle
Robert Campbell	Anne & Roy Kahle	Regan Ready
Gary Carder	Bryan & Patricia Kassa	Herbert Revel
Blaine Carson & Judy Murray	Elizabeth Kingdon	Tim Rioux
William Cassan	Gabriele Klein	Jean Robertson
Don Cavers	Thomas & Adeline Kolkind	Irene Rogers
Deborah Chapman	Ken & Adeline Kolkind	Irene Sansom
Gerry & Rita Chu	Julian Kuna	Brian & Tess Sansom
Ian & Wendy Clay	Edwina Kurta	Karen Sansom
Josephine Coffey	Garry & Mary Landers	Mike & Pam Saul
Maureen Croft-Steen	Eleanor Lawrence	Anthony & Vivien Say
Rochelle Dale	Doug & Joanne Leatherdale	Ulrich & Margarete Schoene
Patricia Danforth	Catherine Lee	Kristy Schroeder
James & Helen David	John Leasing	Donna Schuler
Edith Deman	Chris & Tina Letham	Marian & Ralph Segreto
Cindy Derkaz & Don Derby	Judy Linkletter	Paula Shields
Nina Dickins	Gary & Gerry Little	Barbara Smart
Alice & Fred Duck	Linda MacDonald	Carman Smith
Kari Dukeshire & Bernie Weare	Joyce MacDonald	Jean & Ralph Smith
Melany Dyer	Brian & Rochelle Marr	Wayne Spencer
David & Caroline Edgell	Barbara Massey	Jack & Edith Stead
Jocelyn Elder	Patricia May	Laureen Vandenberg
Estate of Dr. Tess Trueman	Daron Mayes	Kathryn Vennard
Julia Flatman	Diane Mc Farlene	Margaret Vennard
Reid Fowler	Dale & Devora McAuley	Ramona Wainwright
Malcolm Fowler	Barbara Meek	Reg Walters
Paula Fredlund	Terrance Michell	Jean Williamson
Jean Frolek	Diane Miller	John Wilson
Shelley Geier	Carol Minor	Philip Wright & Isabel Reinertson
	Estate of Ethel Graham	

# Donor Organizations

222 RCACS Sponsoring Committee	Eagle Bay Timber Products
Arts Council for the South Shuswap	M. E. M Holdings
BDO Canada LLP	Mawer Investment Management
Bell Canada	Scotia McLeod
Clark Robinson	Bike for Your Life Century Ride
Copper Island Fine Homes	She Shoe Swaps
DEO Lutheran Church	Shuswap Trail Alliance Society
Dinoflex Group Limited Partnership	Sharon Besler Robert Baker Endowment Fund



# Funder Profile - Morris Bursary Fund

As a person who knows and acknowledges the value and power of education, Robert Morris decided that a bursary would be the best way he could make a difference in his community. A Salmon Arm resident since 2000, Robert says his library card is his most valued possession.

Robert researched the challenges faced by modern post secondary students. Finding that girls are uniquely challenged in their career choices, he decided to create a bursary specifically for girls in high school. So the “Morris Bursary Fund for Excellence in Mathematics” was created in 2008.



Robert Morris, Alexandra Landy & SCF Director Sharon Gavel

As a subject that opens the doors to careers in highly technological fields, mathematics affords students the advantage of pursuing studies that are on the cutting edge of human advancement. Critical thinking, problem solving, analytical thinking, the ability to manipulate precise and intricate ideas, and quantitative reasoning are just a few of the many career-advancing skills that are developed through the study of mathematics.

The 2018 recipient, Alexandra Landy, embodies and personifies the young woman of the 21st Century. A well rounded young lady and diligent student who makes time to volunteer, she envisions a career that will enable her to further human advancements and leave a lasting impact. She is enrolled in Systems Design Engineering at the University of Waterloo.

Shuswap Community Foundation, through the “Morris Bursary Fund for Excellence in Mathematics”, is one of the many ways the Foundation has worked to connect people who care with causes that matter.

Recipients of the “Morris Bursary Fund for Excellence in Mathematics”	
2017	Katie Jensen
2016	Faye Lucey
2015	Kiana Hampton
2014	Maria Guenter
2013	Lucy Grainger
2012	Taylor Bahen
2011	Melanie Spottock
2010	Hayley Petznick

Investing in education has one of the highest rates of return on investment the Foundation could ever make.

On behalf of Alexandra, the Landy family, School District 83 and Shuswap Community Foundation, thank you to Robert Morris for his very generous gift to the Shuswap community.

Please visit our website for the complete story at [shuswapfoundation.ca](http://shuswapfoundation.ca)

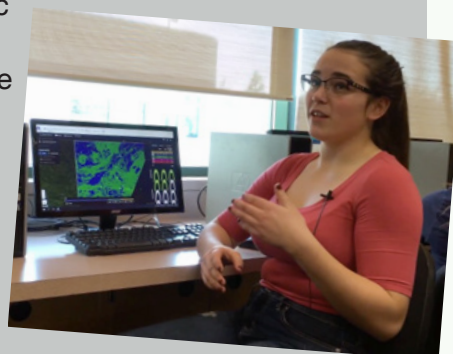
## Project Profile - BC Tomorrow



“The Shuswap Foundation’s donation to BC Tomorrow has been instrumental in two key areas of our work: extension and curriculum. We have brought these together through the production of compelling videos delivered online. Having the resources to not only share knowledge and systems understanding about economic sectors, climate change and watershed dynamics but most importantly to showcase the student and teacher experience is a

tremendous communications asset. We are grateful for the support of the Shuswap Foundation in helping us develop this vital component of BC Tomorrow’s success.”

Barry Wilson, President, BC Tomorrow Society



# Founders Profile - Joan & Denis Marshall

## A Passion for Our History

Joan Marshall's roots go back to the 1880s when her Finnish great-grandfather, Kusta Laitinen, came to work as a section foreman on the CPR. One of Kusta's daughters, Joan's grandmother, married an Englishman, Bill Holliday, who named Piccadilly Road and Rotten Row after the same streets in London, England. Joan trained as a teacher, then had three daughters with her 'handsome Mountie' husband.

Joan knew Denis Marshall since Grade 6 at Salmon Arm Elementary. When Joan, now a single mom of three daughters in Vernon, attended a retirement party for her Grade 1 teacher, Miss Fawcett, Denis covered the event for the *Observer*. This marked the start of their romance and a happy 40-year marriage.

In 1944, Frank and Laura Marshall bought the *Salmon Arm Observer*. Denis worked in the family business full time from 1953 to 1976. After his father's death in 1964 he became the Publisher and got to know 'everyone' in Salmon Arm while reporting on and documenting local events, and developing a passion for local history.

In 1976 Joan and Denis sold the *Observer* to Ian and Lynn Wickett and moved to the coast, but the Shuswap drew them back in 1993. Joan served on the Board of the Art Gallery for several years while Denis put his love for local history to work with the Salmon Arm Branch of the Okanagan Historical Society as its long-time treasurer. He also wrote four books on community history.

Denis loved to hike and bike in the outdoors. Joan relates that her first gift from Denis was a good pair of hiking boots. Joan says she 'went along for the ride' and enjoyed every minute with Denis and his passion for history.

Denis' vision and love for community made him a natural as one of the earliest Board Members and ardent promoter of the Shuswap Community Foundation.



Please visit our website for the complete story at [shuswapfoundation.ca](http://shuswapfoundation.ca)

## Project Profile - International



"This award means a lot to me. It is a great motivation for me to serve my community. You have made a difference in my life, this is a great financial support towards my education. I would like to thank you from my heart."

Henderson Award in International Development -  
Recipient - Dinesh Adhikary -  
Ph.D. Student UBC Okanagan

THE SHUSWAP COMMUNITY FOUNDATION  
IS GRATEFUL FOR SUPPORT FROM THE  
FOLLOWING SPONSORS:



**The Papworth Team**

PROFESSIONAL WEALTH MANAGEMENT

