



2010/2011 COMMUNITY REPORT



COMMUNITY
FOUNDATIONS
OF CANADA



SHUSWAP
COMMUNITY
FOUNDATION

OUR MISSION

To provide a vehicle for residents of the Shuswap to enrich their community in perpetuity through a variety of endowed funds;

To disburse the earnings on the capital fund annually to build community capacity and to support charitable projects that will enrich the lives of residents;

To honour and remember the Foundation's donors; and to assume a leadership role in community philanthropy.

BOARD OF DIRECTORS



Front row: (l-r) Karen Angove, (President), Marilyn Brown, Ineke Hughes, Deborah Chapman

Back row: (l-r) Ralph Segreto, Gary Brooke, Doug Adams, Alice Duck, Bryan Kassa, Ted Apted

Insert: Dave Wood (Treasurer)

Missing: Joanne Mason

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President's Report

2010/2011 Fiscal Year



In this report we highlight stories of a few of our many founders, donors and charitable organizations. Their stories demonstrate what the Foundation is really all about. It is what makes the task of leading the Shuswap Community Foundation so rewarding.

As the years go by our organization is maturing. The Foundation is here in perpetuity but alas, our directors are not. It is therefore important that our stewardship of endowment funds is done in such a way as to allow a seamless continuation year after year. This year the investment committee has taken a good hard look at the way we are managing our investments. On the committee's recommendation, the decision has been made by the Board to hire an investment management firm to manage our funds. We have done very well up to this point – in fact better than many foundations – and we are extremely grateful to our local investment advisors from Scotia McLeod and RBC Dominion Securities for our success. With the challenges in the marketplace and with our funds growing we have decided that this move will be a more efficient way to manage our endowment funds and allow our directors more time to focus on growing our funds.

A very significant event for the Foundation this year was the retirement of our President, Cindy Derkaz at the end of January. Cindy was involved in initially setting up the Foundation and has been on the Board ever since. She was president for a total of 11 years, participating on every committee. She is passionate about the organization. This, and her attention to detail and work ethic, has set a high standard for the organization. She has left us in good shape with a very capable board. From the bottom of our hearts, we thank her for her contribution and wish her all the best. To take her place on the Board we have welcomed back Gary Brooke, another charter member of the organization.

Two more directors are retiring this year, Marilyn Brown and Ted Apted. We thank

them both for their hard work and dedication and will miss them around the board table. We welcome two new directors, Rod Bailey (Sicamous) and Melany Dyer (Sorrento).

The Foundation continues to grow, with our endowment fund reaching \$4.6 million this year. We will be handing out \$158,852 in grants to the community at our Annual Community Meeting this year. Of special note this year is the first grant disbursed from the Browne Johnson Legacy Fund established in 2007. Their business celebrates its 50th anniversary this year. They set up this fund of \$50,000 so that each year a grant will be given in the firm's name to show their appreciation of the support the community has given them throughout the 50 years.

Four of our directors and our administrative assistant, Laurie Ankenman, attended the Community Foundations of Canada conference this spring. The conference gave us the opportunity to network with other foundations from Canada and around the world, to listen to many philanthropic speakers including Bill Clinton, Naomi Tutu, and Governor General David Johnson, and to attend many workshops that made this a very significant and worthwhile experience.

On behalf of the board, I would like to thank all our donors and sponsors for their continued support. I personally thank the board for their support during this transition time while I take on the daunting task of replacing Cindy at the helm of this wonderful organization. Together, we will grow and build for the future of our communities.

Karen Angove - President

Browne Johnson Land Surveyors

The plan took shape early in 2007. In 2011 Browne Johnson Surveyors would be 50 years old, and the partners wanted to commemorate this milestone by somehow sharing the results of their success.

Bob Browne, Greg Browne, Joe Johnson and Brian Sansom believe they have a duty and responsibility to give back to the community that has sustained them since 1961, so they decided to create an endowment fund with Shuswap Community Foundation.

It all began in March of 1961, when M.D. (Bob) Browne moved his family to Salmon Arm and opened up a land surveying business. As the business grew, several moves were undertaken to accommodate more employees and equipment. The office is now located on Alexander Street in Salmon Arm, where they 'feel part of the downtown community' says Joe Johnson.



Left to right: Bobbi Johnson, Brian Sansom, Marj Scharf, Nicole Bird, Maria Willekes, Merlyn (Bob) Browne, Greg Browne, Joe Johnson

In 1988 Greg and Joe joined forces, purchasing the business, together with land and buildings, and renamed it Browne Johnson Land Surveyors. The company has worked all over the Shuswap and various areas of BC, as well as in national parks and aboriginal lands across BC. It credits its success to all those dedicated individuals who have made up the team at Browne Johnson, past and present.

Now the plan has reached fruition. The first grant from the Browne Johnson Legacy Fund established in 2007 will be disbursed at the discretion of the directors of the Foundation in October 2011. A grant will continue to be given in the firm's name in perpetuity, each year extending a thank you to the Shuswap community for its support of the business.



New Endowment Funds

Established July 1, 2010 to June 30, 2011

- Anonymous Eagle Valley Seniors Endowment Fund
- Brad Jackson Scholarship Fund
- Douglas Burkitt Memorial Endowment Fund
- Earl and Muriel Mackenzie Family Endowment Fund
- Geoff and Judith Benson Family Endowment Fund
- Gerry and Rita Chu Family Endowment Fund
- Molly Bell Endowment Fund
- Robin Jackson Environmental Endowment Fund
- Rod Bailey Endowment Fund
- Shuswap Children's Literacy Fund
- Tom and Elsie Brighthouse Family Endowment Fund

2011 Discretionary Grants

Grant Recipient	Grant	Fund
222 RCACS Sponsoring Committee <i>Project:</i> Spotting scope	\$500	Youth Endowment Fund
Bill Miner Society (Caravan Farm Theatre) <i>Project:</i> Furniture for new artists in residence cabins	\$2,000	Derkaz / Derby Family Endowment Fund, Higgins Family Endowment Fund, and General Fund
Canadian Mental Health Association <i>Project:</i> Three health promotion initiatives	\$1,200	Shuswap Coordinating Training Society Endowment Fund
Canadian Red Cross (BC South. Int. Region) <i>Project:</i> Specialized wheelchair	\$2,000	Wainwright-Mobley Memorial Fund and General Fund
Hillcrest Elementary Parent Advisory Council* <i>Project:</i> Hillcrest Primary School playground	\$1,000	Salmon Arm Schools Legacy Fund and General Fund
Kamloops Symphony Society <i>Project:</i> Concert series in Salmon Arm 2011/2012	\$1,500	Gertrude and Ludwig Klein Memorial Fund and General Fund
Literacy Alliance of the Shuswap** <i>Project:</i> Soup and Stories - Adult Literacy Storytelling project	\$600	Ev Painter Endowment Fund
Malakwa Community Centre Association <i>Project:</i> New tables and chairs for hall	\$2,000	John and Ingrid Monk Endowment Fund and General Fund
North and South Shuswap Community Resources Association <i>Project:</i> Facilitated youth program	\$2,000	Salmon Arm Savings and Credit Union Youth Endowment Fund and General Fund
North Okanagan/Shuswap Brain Injury Society <i>Project:</i> Protective awning for building front	\$1,600	Paul and Elvi Pukas Family Endowment Fund and General Fund
Salmon Arm & Shuswap Lake Agricultural Association <i>Project:</i> Portable handwash stations	\$1,000	Turner Orchards Endowment Fund and General Fund
Salmon Arm Bay Nature Enhancement Society <i>Project:</i> Weed control machine & boardwalk upgrades	\$3,000	Potter /Edgell Family Endowment Fund, Salmon Arm Savings and Credit Union Community Endowment Fund and General Fund
Salmon Arm Museum and Heritage Association <i>Project:</i> Artifact restoration at Haney House	\$3,000	Lloyd and Dorothy Askew Family Endowment Fund
Seymour Arm Community Association† <i>Project:</i> Stair repairs and walkway at Community Centre	\$1,000	Seniors Fund and General Fund
Shuswap Art Gallery Association <i>Project:</i> Portable sound system	\$2,000	Gordon and Bev Marshall Family Endowment and General Fund
Shuswap Community Foundation <i>Project:</i> Serendipity grants at President's discretion	\$1,000	General Fund
Shuswap Day Care Society <i>Project:</i> 24 passenger bus	\$3,000	Wainwright-Mobley Memorial Fund
Shuswap Association of Writers‡ <i>Project:</i> Shuswap Writers' Festival 2012	\$1,000	General Fund
Shuswap District Arts Council <i>Project:</i> Office equipment upgrade	\$3,000	Lloyd and Dorothy Askew Family Endowment Fund
Shuswap Family Resource and Referral Society <i>Project:</i> DVD information sessions	\$2,500	Jennifer Phillips Memorial Fund, Shuswap Coordinating Training Society and General Fund
Shuswap Hut and Trail Alliance Society <i>Project:</i> 2011 Shuswap Trail Guide & Map Project	\$5,000	Browne Johnson Legacy Fund
Shuswap Lake South Shore Historical Committee§ <i>Project:</i> Record stories and collect pictures of early settlers	\$700	General Fund
Shuswap Music Festival Society <i>Project:</i> 2012 Music Festival adjudication expenses	\$1,250	Old Orchard Farm Endowment Fund, Enid Finn Memorial Fund and General Fund
Shuswap Theatre Society <i>Project:</i> New sound system	\$2,000	Earl and Muriel MacKenzie Family Endowment Fund and General Fund
Shuswap Volunteer Search and Rescue Society <i>Project:</i> Radio communications upgrade	\$1,500	John and Ingrid Monk Endowment Fund
Sicamous and District Museum & Historical Society§§ <i>Project:</i> Map storage cabinet and scanner	\$2,000	C. Norman Barber Endowment and General Fund
Sorrento Drop In Society <i>Project:</i> New glee club risers	\$2,000	General Fund
South Shuswap First Responders Association <i>Project:</i> Radio purchase	\$3,000	Sorrento Lions Club - Catherine Dilworth Memorial Endowment Fund and General Fund
Switzmalph Cultural Centre§ <i>Project:</i> Riding lawn mower	\$2,500	Mary Douhaniuk Memorial Fund and General Fund
Total Discretionary Grants	\$54,850	

SPONSORED BY: * North Okanagan Shuswap School District # 83
** Okanagan College

† Aging With Ease in Rural Society
‡ Shuswap District Arts Council

§ Salmon Arm Museum and Heritage Society
§§ District of Sicamous



2011 Donor Directed Grants

Fund	Grant	Recipient/Purpose
Al Neale Bursary Fund	\$3,000	Salmon Arm College Scholarship Trust Fund for awards to Jeffery Taylor, Amber Wilson and Rebecca Stewart
Bill MacDonald Memorial Fund	\$387	Earnings to local chapter Canadian Cancer Society
Brad Jackson Memorial Scholarship	\$500	School District # 83 award to Paige Munro
Centennial Reunion Scholarship Fund	\$200	School District # 83 award to Sam Smith
David John Stratton Memorial Bursary Fund	\$400	School District # 83 award to Alistair Kuznick
Elisabeth Thomi Endowment Fund	\$38,837	Earnings to Shuswap Branch BCSPCA
Eve and Christopher Wright Scholarship Fund	\$500	Salmon Arm College Scholarship Trust Fund award to Dylan Abbott
Fowler/Gomme Family Endowment Fund	\$250	Award to Hannah Gomme at Shuswap Music Festival 2011
Frank and Rita Smuin Memorial Bursary Fund	\$700	School District # 83 award to Ariel Smith
Henderson Award in International Development	\$1,000	Award to Vida Yakong
Hospital Legacy Fund	\$535	Earnings to Shuswap Hospital Foundation
Jack and Edith Stead Endowment Fund	\$500	Earnings to Salmon Arm Museum and Heritage Association
Janet Pattinson - Shuswap Naturalist Club Bursary	\$659	To fund the Shuswap Naturalists Bursary
Marie Manson Memorial Art Award Fund	\$1,000	Earnings to Shuswap District Arts Council award to Cathy Stubbington and Judy Simms.
Mary Douhaniuk Memorial Fund	\$978	Earnings to Shuswap Hospital Foundation
Morris Bursary Fund for Excellence in Mathematics	\$500	School District # 83 award to Melanie Spottock
Nayki/Greer Family Endowment Fund	\$600	School District # 83 award to Lexi Jabbour
Nayki/Greer Family Endowment Fund	\$602	Earnings to Shuswap Branch BCSPCA
Nick and Marilyn Brown Family Fund	\$500	Salmon Arm College Scholarship Trust Fund award to Jane Kelder
Ready Family Endowment Fund	\$340	Earnings to Shuswap Area Family Emergency Society
Ready Family Endowment Fund	\$340	Earnings to Shuswap Hospice Society
Salmon Arm Kinsmen and Kinette Scholarship Fund	\$1,500	School District # 83 award to Janae Rampone
Salmon Arm Secondary Athletic Endowment Fund	\$829	Earnings to SD #83 for Salmon Arm Secondary Athletic program
Shuswap Branch BCSPCA Endowment Fund	\$1,618	Earnings to Shuswap Branch BCSPCA
Shuswap Volunteer Firemen's Association - Cody Davies Memorial Bursary	\$450	School District # 83 award to Skylar Plourde
Steve Heal Memorial Scholarship Fund	\$450	School District # 83 award to Hannah Gomme
Tom Brush Memorial Scholarship Fund	\$500	School District # 83 award to Eric Forness
Tomas Idzan Memorial Bursary Fund	\$500	Salmon Arm College Scholarship Trust Fund award to Nicole Sjolie
Walter Ellaschuk Memorial Bursary Fund	\$1,000	School District # 83 awards to Jennifer Quibell and Scott Girvan
Wayne Williamson Memorial Fund	\$152	Earnings to Shuswap Volunteer Search and Rescue Society
Total Donor Directed Grants	\$59,327	



Maintaining the Charm of Salmon Arm

Rita and Gerry Chu love the charms of Salmon Arm - the small town feel and the many amenities - nature trails, musical events, art gallery, museum, theatre, film society and more. All run by volunteers! They would like our town to retain this community feel and want to support the volunteers who make this wonderful lifestyle possible.

In 1976 they were a young couple freshly graduated from The University of British Columbia—Gerry from the Dental School ('76) and Rita from Dental Hygiene ('75). Arriving in Salmon Arm in March, after only four months they decided this was the place for them - a place to raise a family. They fell in love with Salmon Arm because of its many natural charms and the genuine community spirit powered by volunteers. Friends and relatives who expected them to return

to Vancouver were surprised. Gerry was born and bred in Vancouver and Rita, originally from Burns Lake, spent her university years in the big city.

Gerry and Rita established a well-respected and busy dental practice and raised two daughters: Carina born in 1980 and Kristy in 1984.

Why did they choose to set up a discretionary family fund? They were among the visionary founders of the Shuswap Community Foundation;

they know this is a good organization, run by dedicated, knowledgeable and hard-working volunteers. And finally, they like the Foundation, because as Gerry says, "It is satisfying because we can see where the money goes."

Their overriding sentiment is that a town needs a balance between business and the amenities that contribute to a quality life, and Salmon Arm has this balance because of its volunteers and the Shuswap Community Foundation.



**PULLING TOGETHER
FOR OUR COMMUNITY**

2011 Agency Grants

Fund	Grant	Recipient/Purpose
Anglican Parish of Salmon Arm - Sicamous Endowment Fund	\$519	Earnings to fund holder
City of Salmon Arm Endowment Fund	\$3,392	Earnings re-invested in fund
North Okanagan - Shuswap School District Endowment Fund	\$2,258	Earnings to School District # 83 for scholarships and bursaries
Okanagan College Foundation Fund	\$4,166	Earnings to fund holder
Salmon Arm College Scholarship Trust Fund - George and Nancy Clark Memorial Bursary	\$3,168	Jeremy Bray and Ryan Rithaler
Salmon Arm College Scholarship Trust Fund - Len O'Neill Memorial Award	\$2,786	Andrea Balance, Camille Brandt, William MacFie, Kyla Oshanek
Salmon Arm College Scholarship Trust Fund - Vicki Hitchen Memorial Award	\$2,438	Cheryl Oppenheimer and Jennifer Porcina
Salmon Arm Museum and Heritage Association Endowment Fund	\$4,795	Earnings to fund holder
Salmon Arm Museum and Heritage Association Endowment Fund - Peterson Family Fund	\$1,965	Earnings to Salmon Arm Museum and Heritage Association
Shuswap Art Gallery Association Endowment Fund	\$11,768	Earnings to fund holder
Shuswap Community Foundation Administration Fund	\$2,352	Earnings to support administration of Foundation
Shuswap District Arts Council Endowment Fund - Blair Borden Memorial Award	\$1,000	Joseph Dansereau and Hannah Gomme
Shuswap District Arts Council Endowment Fund	\$1,458	Earnings to fund holder
Shuswap District Arts Council Endowment Fund - Thompson Okanagan Network Arts Council	\$219	Earnings to fund holder for regional meeting
Shuswap Hospice Society Fund	\$1,266	Earnings to fund holder
Shuswap Hut and Trail Alliance Society Endowment Fund	\$81	Earnings reinvested in fund
Total agency grants	\$43,631	

Foundation Founders

The Askew Family	Edith and Edward Fountain	Michelle and Robert Papworth
Wendy and Edward Apted	Joyce and John Henderson	Betty and Allan Paterson
Muriel and Frank Barnard	Lois and Harry Higgins	Hjalmar Peterson
Marcia and Jim Beckner	Joan and Colin Hill	Hubert Peterson
Margaret and Sid Bedwell	Linda and Rick Hirtle	Holly and Shayne Ready
Thomas Bowers	Annie and RW Holliday	The Ritchie Family
Gayle and Jack Bowers	The Hucul Family	Salmon Arm Observer
The Braby Family	Bobbi and Joe Johnson	Salmon Arm Savings and Credit Union
Elsie and Tom Brighthouse	Linda and Bill Laird	Jim Scales
Sunni Berger and Gary Brooke	The Letham Family	Marian and Ralph Segreto
Wendy and Greg Browne	The MacKenzie Family	Catherine and Joseph Shay
Margery and Leon Carter	Peggy and Ed Marsden	Mavis and Dick Smith
Rita and Gerry Chu	Joan and Denis Marshall	Barbara Strohan
Nancy and George Clark	Lil and Ken McKee	Bonnie and Graham Threlkeld
Pauline ("Peg") Clarke	Laura Middleton	Dr. Tess Trueman
Cindy Derkaz and Don Derby	Ivy and Sam Miller	Shirley and Clyde Tucker
Nina Dickins	Ingrid and John Monk	The Ronald Turner Family
Margaret and Ernie Doe	Agnes and Morrie Morrison	Maud and Robert Turner
Brooke, Jackson, Downs	Doris and Norman Murray	The Ujimoto Family
Kari Dukeshire and Bernie Weare	Jennie and Vic Nancollas	Lynn and Ian Wickett
Ian Duncan	Ray Newnes	Eve and Chris Wright
Mary and Reid Fowler	Elizabeth Louise Ozeroff	

Ted and Wendy Apted, Foundation Founders

In 1968, Ted & Wendy Apted moved to Sorrento, BC. Ted, holding a M.ED in Psychology, was a special counsellor in the Kamloops School District then, and commuted to work, while Wendy chose to forego a career in nursing to stay home and raise their four children, Anita, Lake, Zoë and TJ.



Ted met Wendy Finn on the beach in English Bay, where he moonlighted as a lifeguard, in July of 1956. They “clicked”, and were married on December 26 the same year. After a one and a half year “honeymoon” in Ocean Falls, and the birth of their first child, they returned to Vancouver so Ted could begin working on his master’s degree. From there, another move took them to Kamloops, where the rest of the children were born, before settling into the lake house at Sorrento. Wendy’s parents, Eric and Enid Finn, had also moved to the Sorrento area

from Kamloops, providing grandparent support to the young family.

Ted’s teaching/counselling career encompassed stints as Vice-Principal at Jackson Jr. Secondary in Salmon Arm, Principal at Enderby Jr. Secondary, and the role of Teacher in Prince Rupert, before returning to the Kamloops School District for a further 20 years. He retired in December of 1993.

Wendy’s mother, Enid, was very active in the Sorrento volunteer community, and had been the Anglican minister there. Her example inspired Ted

& Wendy, and their children, to contribute and give back to their community as well. In 1994, when Ted saw an article in the paper describing the formation of Shuswap Community Foundation, and recognized the names of people he knew and trusted who were contributing funds to get the idea off the ground, he and Wendy chose to support the effort and became Founders as well.

In 2007, Ted joined the Board of Directors of the foundation he and Wendy helped establish.

Shuswap Hospice Society

A strong, volunteer-based community organization, the Shuswap Hospice Society has been offering compassionate care for the dying and bereaved in and around the Shuswap for 25 years.

Included in its services are: grief counselling, palliative care, care for caregivers, holiday support, a parents bereavement support group, a young widows’ support group, a men’s support group, and compassionate care for the terminally ill, to name a few.

The course, “Introduction to Palliative Care”, provides 30 hours of BC Hospice Palliative Care Association standardized hospice training. The core curriculum of the course is often customized to meet the needs of the people attending, such as specific areas of concern, or the average age of the group. It is offered one or two times a year,



depending on demand. Everyone is welcome to attend, whether to become a volunteer or for personal reasons.

In 2010, Shuswap Community Foundation awarded a \$1,000 grant drawn from the Seniors Project Fund to offset the cost of providing volunteer training.

Brad Jackson Scholarship Fund

He was a kind, gentle kid who loved sports. He played hockey from a young age, began playing rugby when he was in Grade 8, and had just started playing football. A fit, focused athlete, when he wasn't on the ice or on the field, he'd be in the gym, training.

Born in Salmon Arm, Brad Jackson was in Grade 11 when he passed away.

Well-liked and respected by his teachers, Brad, a straight 'A' student, set very high goals for himself, always challenging himself physically and intellectually. He told his family he might like to enter the field of medicine, or become a teacher, specifically of history, which he loved. He enjoyed school and was an attentive student who didn't give his teachers, or his parents, any trouble. His Principal, Greg Kitchen, says Brad was an exceptional student with a great sense of humour. Richard Sweet, Brad's fitness trainer, called him "the

real deal, a role model for his fellow students. He walked and talked with confidence, and treated everyone he met with respect and kindness." "Everybody loved Brad" is a frequent comment made in the memorial books his family treasures.

The Brad Jackson Scholarship will be awarded each year, in remembrance of Brad, to a graduating student who intends to pursue post secondary studies, has demonstrated combined achievement in academics and athletics, and who best exhibits Brad's qualities of self-discipline, sportsmanship and determination.



*Bradley Steven Jackson
March 26, 1994 – September 26, 2010*



Malakwa Community Centre Association

The Malakwa Community Centre Association is determined to maintain Malakwa as a vibrant, close knit community, whose citizens have access to all the basic services and recreational opportunities available in any community, while at the same time enjoying a rural lifestyle. To that end, the association has been instrumental in reviving the Community Park, located on Malakwa Station Road close to the old 'downtown core' of Malakwa. It borders the Eagle River and is within walking distance of the old community hall.

The park, owned jointly by the association and the (Malakwa) Farmers' Institute, is undergoing rejuvenation. Power has been installed, and a well drilled. In 2010, with the help of a \$6,000 grant from the Shuswap Community Foundation, a pump house was built and the well connected. The grant, the largest awarded to date, consisted of monies drawn from the John and Ingrid Monk Endowment Fund, the Lloyd and Dorothy Askew Family Endowment Fund, and the General Fund held by the Foundation.

In Memoriam

Wendy Apted	Walter Ellaschuk	Phyllis Lipsett	Elizabeth Revel
Dorothy Askew	Carole Erickson	Ross Living	Carson Everett Reynard
Lloyd Askew	Enid Finn	Pauline Lovegrove	Maimie Reynolds
Roger Ayles	Kathleen Flucke	Bill MacDonald	Janet Riley
Barbara & Marcel Asquin	Gloria Foulkes	Marie Manson	Mary Romeril
Muriel Axe	Mary Fowler	Caroline Marriott	Agnes Rudeen
C. Norman Barber	Art Fraser	Peggy Marsden	Marge Sabo
Carol Berger	Jack Gillick	Dick Marshall	Sigmund Schubert
Del Beckner	Guy Graham	Gordon Marshall	Joe & Catherine Shay
William Bews	Bob Griffiths	Donald Matthews	Sieg & Louise Silver
Blair Borden	Dr. Eve Gulliford	Marion Matychuk	Donald Sinclair
Bertha Boswell	Bob Hall	Harry Mayson	Frank & Rita Smuin
Ernie Braby	Eleanor Hall	Heather McConnell	Gene Spence
Joan & Gordon Brooke	Steve Heal	Ross McLeod	Doug Stammers
Marion & Jack Brooke	Hans Henschel	Mary (Coles) Michell	John Steen
Nick Brown	Margot Hewitt	Maj. Charles Wm &	Lloyd Stewart
Tom Brush	Dr. Laura Hiscock	Laura Mae Mobley	Shirley Stewart
Marlene Burbine	Vicki Hitchen	Ruby & Howard Mobley	Geoff Suddaby
Doug Burkitt	Marjorie Hogberg	John & Ingrid Monk	Mary Lou Tapson-Jones
Dorothy Byers	Barbara Holbrook	Jim Morris	Bruce Tulloch
Alex Chisholm	Lawrence Huntley	Bob Muirhead	Herb Turner
Father Bob Chisholm	Tomas Idzan	Nathan Nash	Maud & Robert Turner
Marilyn Christie	Bradley Jackson	Bob Nelson	Howard van der Hoek
Nancy & George Clark	Robin Jackson	Ray Newnes	Brian Volker
Morris George "Butch"	Barbara Jeffrey	Joyce O'Neill	James Howard Wainwright
Clifford	Margarette Johnson	Kathleen O'Neill	James Ross Wainwright
Bob Davies	Rita Marie Jones	Len O'Neill	David Walters
Cody Davies	Olive Jordan	Betty & Alan Paterson	Mati Walters
Dr. Barry Deakin	James Gerard (Jim) Kennedy	Mattie Persson	Richard Walters
Betty-Jean & Walter Derkaz	Peggy Kernaghan	Floyd Peterson	Helena Wickett
Margaret Doe	Gertrude & Ludwig Klein	Jennifer Phillips	Dr. Ralph Williams
Mary Douhaniuk	Harold Kurtz	Gordon Priestman	Dave Williamson
Murray Dunne	Dr. Bert Letham	Paul Pukas	Wayne Williamson
Sinclair Dunnett	Sherry Lewis	Shayne Ready	Chris & Eve Wright

... Kamloops Symphony Society

With generous support from the Shuswap Community Foundation and the Gertrude and Ludwig Klein Memorial Endowment Fund, the Kamloops Symphony Society was able to offer a series of three performances in Salmon Arm during the 2010/2011 concert season to a growing, appreciative audience at a price that is accessible for most people.

Through this series, the Society is addressing its objectives of extended service to regional communities and the provision of orchestral performances of outstanding artistic quality that encompass an exceptional variety of music while showcasing acclaimed Canadian guest artists. The orchestra also strives to provide opportunities for professional musicians to live, work and perform in the Interior of BC.

Photo: Salmon Arm Observer





Photo: Craig Pulsifer

In Praise of Volunteers

Tom and Elsie Brighthouse Family Endowment Fund

“We love Salmon Arm! We are continually amazed at the number of people doing volunteer work in our community”

This is the reason Elsie and Tom Brighthouse opened a family fund in their names, from which the proceeds will begin to be distributed at the Foundation’s discretion during their lifetimes.

They met at the University of Liverpool while attending teacher’s college, and in 1956 embarked on the adventure of their lives by coming to Canada as young teachers, along with Elsie’s daughter Pat from her first marriage (her husband drowned during an Army exercise). The province of BC sent an interviewer to Liverpool and recruited the young couple for teaching positions in Salmon Arm: Tom taught French and Elsie English at the Jackson High School. Elsie added a Masters in counseling to her qualifications and later worked in that field. Tom advanced to become a school principal and later Director of Education.

They recall the crossing by sea on the Empress of Scotland; the exciting train ride across Canada; and lovingly remember their greeting by Clara Johnston with a tea reception. In time, two daughters, Ruth and Jean, were born. They had satisfying teaching careers and enjoyed tennis, x-country skiing, hiking, camping, RV-ing, birding, trail building and, of course music.

Both Tom and Elsie are so proud to have been a part of the establishment of the Shuswap Community Foundation. They wanted to start their family fund while they were still alive so they could enjoy that wonderful feeling at the annual community meeting when money from their discretionary fund is handed out to volunteer groups to benefit the community. They have opened their fund to other donations.

2010/2011 Foundation Donors

Douglas & Donna Adams	John & Joyce Henderson	Regan Ready
Freda & Eric Aitken	Deane & Barbara Henderson	Jean Robertson
Laurie Ankenman	Beryl Herdan	Robert & Marlene Robertson
Anonymous	Sandra & Leigh Hewitt	Betty Ross
Anonymous	Harry & Lois Higgins	John & Irene Sansom
Anonymous	Ineke Hughes	Mike & Pam Saul
Anonymous	Charlotte Hutchinson	Jim & Norma Sawada
Anonymous	Mary Jackson	Don & Jan Sawyer
Edward & Wendy Apted	Jim Jackson	Ulrich & Margret Schoene
Gordon & June Askew	Ken Jamieson	Muriel Schubert
Rod Bailey	Reg & Dianne Janzen	Ralph & Marian Segreto
Diane Barr	Joseph & Bobbi Johnson	Ken & Rigmor Short
Warren & Joanna Bell	Patrice Johnston	Jack & Edith Stead
Judith Molly Bell	Peter & Barbara Kilby	Carol Stenquist
Geoff & Judith Benson	Gabriele Klein	Ian Duncan & Maureen Stickney
Gary Brooke & Sunni Berger	Penni Leigh	Tom & Sue Taylor
Donna & David Booth	Chris & Tina Letham	Mike & Jenifer Thewalt
Amy Boutwell	Raelene & Dale Living	Neil & Sophie Toews
Caroline Brear	Ron & Lynn Lozinsky	Kathryn Vennard
Elizabeth Brear	Per Lundgren	Kari Dukeshire & Bernie Weare
Mike Smith and Joanne Brear-Smith	Charles & Joyce MacDonald	M. Joan Willey
Tom & Elsie Brighthouse	Arthur MacKenzie	Brooke Jackson Downs
John & Evelyn Briscoll	Deborah MacLeod	Browne Johnson Land Surveyors
Marilyn Brown	Brian & Rochelle Marr	City of Salmon Arm
Laura Burkitt	Bev Marshall	Salmon Arm Savings & Credit Union
Robert Campbell	Teresa & Russell Massier	Shuswap Art Gallery Association
Deborah Chapman	Roy & Dianne Mathwig	Shuswap District Arts Council
Gerry & Rita Chu	Samuel McAuley	TD Canada Trust
Margaret Chrumka & Paul Clark	Jim McConnell	U. S. Natural Resources Division
James & Kathi Cooperman	Thomas McDermott	
Jan Crerar	Ken McKee	
Gary & Cheryl Cruikshank	Michael & Christine Melin	
Kerry Cuglietta	Kelly & Margaret Moores	
Lois B. Cunningham	Robert Leslie Morris	
Rochelle Dale	Thomas & Karen Nayki	
Maureen Defoe	Al Neale	
Patricia Delmore-Ko	Ron & Linda Neden	
Cindy Derkaz & Don Derby	Kurt Neuenfeldt	
Nina Dickins	Jim & Christine Nickles	
Danica Djordjevich	Mary Ormerod	
Joan & John Doerksen	Evelyn Painter	
Alice & Fred Duck	James & Patricia Park	
David & Caroline Edgell	Isabell Paterson	
Janet & Gary Ferns	Janet Pattinson	
Adele & Mike Gelling	Lee A. & Jos Penner	
Alli Graham	Bill & Alice Phillips	
Ethel Graham	Frank & Andrian Potter	
Ed Grainger	Holly Ready	

Permanent Capital Fund

Discretionary Funds

BOARD DISCRETION

(No limitation to Board granting authority)

	2011	2010
Doug and Donna Adams Family Endowment	10,498	3,214
Tom and Elsie Brighthouse Family Endowment	15,291	0
Chapman Family Endowment	2,087	1,020
Derkaz/Derby Family Endowment	29,028	26,804
General	389,848	381,969
Higgins Family Endowment	12,586	7,652
Earl and Muriel MacKenzie Family Endowment	10,981	0
Gordon and Bev Marshall Family Endowment	12,775	11,690
Marian and Ralph Segreto Endowment	6,784	5,454

BOARD DISCRETION - Donor Preference

(No limitation to Board granting authority - donor preference to be considered)

	2011	2010
Lloyd and Dorothy Askew Family Endowment	176,258	175,555
Molly Bell Endowment	1,519	0
Browne Johnson Legacy	59,348	53,692
Gerry and Rita Chu Family Endowment	10,242	0
Enid Finn Memorial	10,002	8,711
Gertrude and Ludwig Klein Memorial	40,195	38,244
Old Orchard Farm Endowment	12,506	12,336
Shuswap Coordinating Training Society Endowment	41,778	42,006
Turner Orchards Endowment	13,905	13,315
Youth Endowment	13,375	13,324

BOARD DISCRETION - Donor Limitations

(Discretion limited to field of interest and/or geographic location)

	2011	2010
Rod Bailey Endowment	10,058	0
C. Norman Barber Endowment	49,409	49,307
Geoff and Judith Benson Family Endowment	161,127	0
Mary Douhaniuk Memorial	48,726	48,560
Eagle Valley Communities Endowment	4,350	2,754
Anonymous Eagle Valley Seniors Endowment	10,346	0
Robin Jackson Environmental Endowment	14,051	0
John and Ingrid Monk Endowment	80,775	80,191
Ev Painter Endowment	16,420	15,319
Jennifer Phillips Memorial	52,680	51,339
Potter/Edgell Family Endowment	21,300	15,441
Paul and Elvi Pukas Family Endowment	31,620	31,289
Salmon Arm Savings and Credit Union Community Endowment	44,275	32,197
Salmon Arm Savings and Credit Union Youth Endowment	14,606	14,487
Salmon Arm Schools Legacy	16,204	15,948
Seniors Project	22,816	22,841
Sorrento Lions Club - Catherine Dilworth Memorial Endowment	79,857	79,541
Wainwright-Mobley Memorial	134,935	134,333



Dedicated Funds

DONOR DIRECTED	2011	2010
Nick and Marilyn Brown Family	10,861	7,803
Tom Brush Memorial Scholarship	12,353	12,333
Douglas Burkitt Memorial	7,112	0
Centennial Reunion Scholarship	5,714	5,673
Mary Douhaniuk Memorial	26,231	26,138
Walter Ellaschuk Memorial Bursary	26,905	26,771
Fowler/Gomme Family Endowment	17,930	17,882
Steve Heal Memorial Scholarship	12,142	11,908
Henderson Award in International Development	21,162	10,089
Tomas Idzan Memorial Bursary	11,068	11,102
Brad Jackson Scholarship	12,152	0
Salmon Arm Kinsmen and Kinette Scholarship	37,506	37,403
Bill MacDonald Memorial	10,596	9,774
Marie Manson Memorial Art Award	27,943	27,734
Morris Bursary for Excellence in Mathematics	16,036	12,924
Nayki/Greer Family Endowment	35,620	24,141
Al Neale Bursary	88,965	71,504
Janet Pattinson - Shuswap Naturalist Club Bursary	18,150	17,571
Ready Family Endowment	20,564	15,154
Salmon Arm Secondary Athletic Endowment	21,821	19,895
Shuswap Branch, B.C.S.P.C.A. Endowment	45,963	38,732
Shuswap Children's Literacy Fund	560	0
Shuswap Volunteer Firemen's Association – Cody Davies Memorial Bursary	13,033	11,941
Frank and Rita Smuin Memorial Bursary	17,579	17,535
David John Stratton Memorial Bursary	10,808	10,801
Jack and Edith Stead Endowment	20,447	10,078
Elisabeth Thomi Endowment	1,041,216	1,037,658
Wayne Williamson Memorial	3,994	4,315
Eve and Christopher Wright Scholarship	11,802	11,803
AGENCY (Funds held on behalf of donor)	2011	2010
Administration Endowment	61,234	60,986
Anglican Parish of Salmon Arm - Sicamous Endowment	13,680	13,636
City of Salmon Arm Endowment	98,590	84,485
Hospital Legacy	11,682	11,129
North Okanagan-Shuswap School District Endowment	58,634	58,322
Okanagan College	109,860	109,445
Salmon Arm College Scholarship Trust - George and Nancy Clarke	83,529	83,227
Salmon Arm College Scholarship Trust - Vicki Hitchen Memorial	63,142	62,908
Salmon Arm College Scholarship Trust - Len O'Neill Memorial	72,569	72,149
Salmon Arm Museum and Heritage Association Endowment	126,466	125,930
Salmon Arm Museum and Heritage Association - Peterson Family	51,811	51,634
Shuswap Art Gallery Association Endowment	311,783	309,113
Shuswap District Arts Council Endowment	38,458	38,267
Shuswap District Arts Council Endowment - Blair Borden Memorial	26,815	26,722
Shuswap District Arts Council Endowment - T.O.N.A.C.	5,771	5,749
Shuswap Hospice Society Endowment	33,546	33,432
Shuswap Hut and Trail Alliance Society Endowment	2,123	2,032
Total Discretionary Funds	1,682,562	1,388,532
Total Dedicated Funds	2,775,923	2,657,826
Total Funds	4,458,485	4,046,358

fund values include contributed capital and retained earnings.

2011 Financial Report

Statement of Financial Position

June 30, 2011 with comparative figures for 2010.

ASSETS

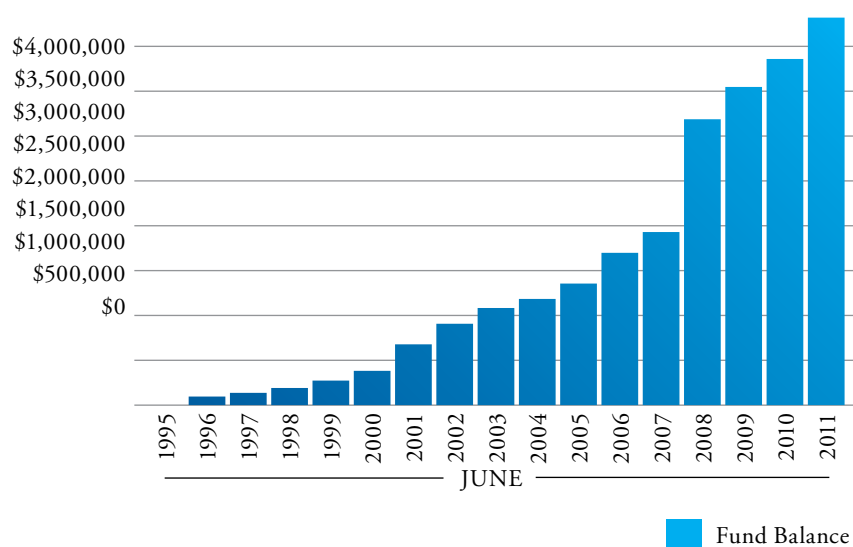
Current assets	2011	2010
Cash & cash equivalents	\$423,852	\$254,016
Accounts receivable	34,833	27,951
Prepaid expenses	675	-
	459,360	281,967
Investments at market	4,098,460	3,694,949
	\$4,557,820	\$3,976,916

LIABILITIES AND FUND BALANCES

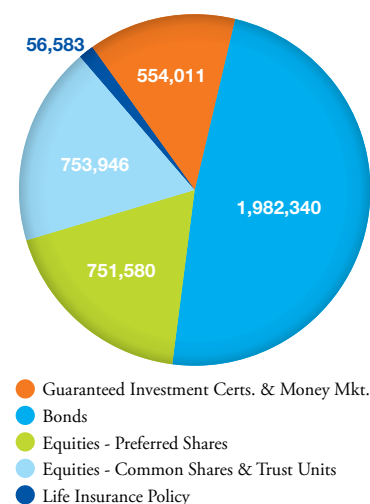
Current Liabilities	2011	2010
Grants and accounts payable	\$2,000	\$2,344
Deferred Revenue (Admin)	18,500	11,350
Funds held for third parties	3,971	8,269
	24,471	21,964
Fund balances		
Endowment funds	4,493,875	3,933,523
Unrestricted assets	39,474	21,429
	4,533,349	3,954,952
	\$4,557,820	\$3,976,916

An unreviewed summary of the Shuswap Foundation's financial position at June 30, 2011.

CAPITAL FUND GROWTH BETWEEN 1995 AND 2011



Investments consist of the following:



Total Investments	\$4,098,460
Interest	\$214



Statement of Revenue and Expenses and Changes in Fund Balances

Year ended June 30, 2011

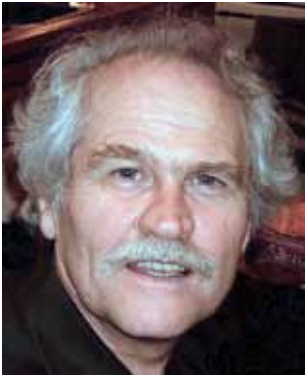
	Endowment Fund		Administration Fund		City of SA Trust Fund		TOTAL	
	2011	2010	2011	2010	2011	2010	2011	2010
Revenue:								
Investment Income (note 1)	\$316,105	\$289,248	-	-	\$214	\$71	\$316,319	\$289,319
Administration Fee	-	-	39,443	36,944	-	-	39,443	36,944
Donations	366,059	204,914	27,133	20,946	50,000	50,000	443,192	275,860
	682,164	494,162	66,576	57,890	50,214	50,071	798,954	602,123
Operational Expenses:								
Administration cost	-	-	48,531	45,133	-	-	48,531	45,133
Administration Fee	39,443	36,944	-	-	-	-	39,443	36,944
	39,443	36,944	48,531	45,133	-	-	87,974	82,077
Excess of revenue over expenses before grants	642,721	457,218	18,045	12,757	50,214	50,071	710,980	520,046
Life Insurance costs	2,600	2,600	-	-	-	-	2,600	2,600
Grants	139,082	127,393	-	-	54,513	47,756	193,595	175,149
	141,682	129,993	-	-	54,513	47,756	196,195	177,749
Excess of revenues over expenses (expenses over revenues) for the year	501,039	327,225	18,045	12,757	(4,299)	2,315	514,785	342,297
Fund balances start of year	3,933,523	3,606,298	21,429	8,672	8,269	5,954	3,963,221	3,620,924
Fund Balances end of year	\$4,493,875	\$3,933,523	\$39,474	\$21,429	\$3,970	\$8,269	\$4,478,006	\$3,963,221

Notes to Financial Statements

Investment Income earned during the year:	2011	2010
Interest and Dividends	\$207,818	\$174,069
Realized gains/(losses)	10,173	5,776
Unrealized gains/(losses)	93,028	108,613
Life Insurance	5,086	791
	\$316,105	\$289,248
Investment income City of Salmon Arm Trust		
Interest	214	71

An unreviewed summary of the Shuswap Foundation's financial position at June 30, 2011

To view full Financial Statements please go to www.shuswapfoundation.ca



Responsibility for Nature

Robin Jackson Environment Fund

Robin Jackson firmly believed that people need access to nature, and that children and teenagers should be introduced to the beauty of the natural world and taught to appreciate its immense value.

A long-term thinker who favoured initiatives that would pay off over time, Robin felt that as individuals we need to reduce our personal and consumer impact on the earth, and to develop a more responsible, sustainable lifestyle. With this thought in mind, his friends and family set up this fund in the hope that his work will be carried on.

Robin was a respected economist/lawyer who chose to come to the Shuswap area in the early 1980's. Here he quickly became a partner in the firm of Brooke Jackson Downs. He did not specialize but took on criminal, family law and

general litigation cases and was a member of the West Coast Environmental Law Group. He loved the arts and participated in all that this area and its surroundings had to offer.

Ecology fascinated Robin and he understood the importance of keeping entire ecosystems, including wildlife corridors and watersheds, intact. As a dedicated environmentalist he believed that real change started with personal action and local projects. Others will carry his convictions forward through this fund established in his honour with the Shuswap Community Foundation.



Derkaz/Derby Family

A generous grant from the Derkaz/Derby Family Endowment Fund and the Foundation's General Fund enabled the purchase of a third rescue toboggan. Strategically located on the trail network, each about 7 km. apart, the Larch Hills Nordic Society now has a complete safety program for the Larch Hills ski area.



222 Shuswap Air Cadet Squadron

Cadets Cody St. Onge and Jackson Calvert attended 222 Shuswap Air Cadet Squadron's weekly ground school last fall. A grant drawn from the Wainwright-Mobley Memorial Fund, the SASCUC Youth Endowment Fund, and Youth Endowment enabled the squadron to purchase a classroom set of textbooks, two computers, and flight simulator equipment to enhance the regular cadet training. Also purchased were materials for the Duke of Edinburgh Award Program, which is open to all cadets.



Learning for Life Workshop Series

A series of free workshops was held from April 4 to 8, 2011 at the Downtown Activity Centre in Salmon Arm to celebrate International Adult Learners' Week (IALW). The Literacy Alliance of the Shuswap Society (LASS) organized this free workshop series for adults of all ages with the help of a generous grant from the Ev Painter Endowment Fund and the General Fund.

Literacy Alliance of the Shuswap Society (LASS)

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THESE PRINCIPLES DESCRIBE THE IDEALS WE STRIVE FOR IN WHAT WE DO FOR THE COMMUNITY

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- Understand Our Communities
- Create Opportunities for Dialogue & Inclusion
- Embrace Partnerships
- Tackle Pressing Issues
- Embrace Diversity & Foster Renewal
- Learn & Share What We Know

For more information visit shuswapfoundation.ca



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