

Promises for Tomorrow



Annual Report to the Community 2007 - 2008

Our Mission

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

To disburse the earnings on the capital funds 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.



Our Directors

Back

Clyde Tucker (Past President)
Dave Wood (Treasurer)
Doug Adams
Cindy Derkaz (President)

Middle

Marilyn Brown
Ted Apted
Alice Duck
Jim Scales (Honourary Director)
Karen Angove
Margaret Chrumka (Secretary)

Front

Lois Higgins
Ralph Segreto
Marg Shand





Cindy Derkaz
President

Message From The President

The 2007-2008 year has been truly remarkable for Shuswap Community Foundation. When the fiscal year began on July 1, 2007, the Foundation's permanent capital fund was just over \$1.8 million and the directors were confident that it would reach the \$2 million mark over the next 12 months.

This benchmark was achieved in November when the Sorrento Lions Club established the Catherine Dilworth Memorial Endowment Fund with a contribution of over \$75,000. Then in December the Foundation received its largest single donation to date: a gift from the estate of Elisabeth Thomi pushed the Foundation's capital fund over \$3 million.

But this is just part of the story. The Foundation also received numerous gifts, large and small, from donors to start or build family endowment funds, remember a loved one, support a philanthropic passion, build sustaining funds for charitable organizations and to "just" give something back to the community.

Along with unprecedented fiscal growth, the Foundation experienced a change in leadership this year. Our president, Clyde Tucker, stepped down during the year after serving on the board and executive since the Foundation's inception. He will be leaving the board when his term expires in the fall of 2008. Without any doubt, much of the Foundation's success can be attributed to Clyde's dedication and vision. We will miss his guidance but he has left a strong board and organization to carry the Foundation into the future. Thank you, Clyde.

I also want to thank all our donors, corporate sponsors, board members and volunteers for their financial support and efforts. We are fortunate to live in such a generous community.

I hope you will enjoy reading the stories of our donors and our grant recipients in this year's annual report. And please let us know what you think of the report and the Foundation's activities. We want to hear from the community we serve.

Cindy Derkaz, President

info@shuswapfoundation.ca



Local Daycare Goes Ahead with Expansion Plans

An exciting time for children, their parents and staff at Shuswap Day Care in Salmon Arm. A \$5,000 grant from the Jennifer Phillips Memorial Fund and the General Fund combined with a number of other donations has allowed the Shuswap Day Care Society to go ahead with its plans for expansion. The daycare serves some 75 to 80 families.



Jennifer Phillips

Jennifer's parents, Bill and Alice Phillips, were on hand June 5th to view the expansion blueprints along with society president Kari Wilkinson, staff and many little "hard-hatted" children.

For the Phillips it was an afternoon of remembering when both of their children, Jennifer and Matt, attended this very facility in 1974/75 just after the current site opened.

The new facility will provide 40 additional spaces for children. The \$200,000+ price tag includes the property, modular building, fencing and utilities.

Ms. Wilkinson says the society is "very fortunate

and thankful for the support so that we can expand without a huge additional debt and can keep costs affordable for parents."

Daycare program director Karen Bubola, says the 24 by 50 ft. modular unit is being built in Kelowna and should be in place, next door to the present building, by fall 2008.

Other support included the Province of BC (\$105,000), Vancouver Foundation (\$25,000), two Salmon Arm Rotary clubs (Daybreak and Noon-hour - \$20,000), Salmar Community Association (\$2,500), BC Lotteries, Askew's Foods, Bill's Bottle Depot and fundraisers put on by parents.



Shuswap Day Care



Filmmaking 101

Pictures courtesy: Salmon Arm Roots & Blues Festival
Videographer: Matt Ram

Take nine local kids add a generous measure of four mentors and a film producer/director, mix in support from four sources, add a big dash of winning music festival and what do you get?



Matt Ram

A “fascinating documentary featuring an up-close, behind-the-scenes chronicle of the 15th Annual Roots and Blues Festival as seen through the lens of nine student filmmakers,” according to the advertising leading up to the video’s premiere at the Salmar Classic Theatre in Salmon Arm.

This venture into filmmaking was the brainchild of David Gonella, volunteer coordinator at the Salmon Arm Roots & Blues Festival. With a background in film production and direction, Gonella wanted to see young people write, produce and edit a 45-minute film focused on volunteerism at the 15th Annual Roots & Blues Festival. Starting in April 2007, Gonella invited local music teacher Brook Roberts on board to select students for this challenge. Gonella says, “We wanted to shake it up and offer a chance for the students to learn the technical side of the television and film industry.”

The nine students: Hannah Gomme, Chris Petterson, Robyn Sawchyn, Dena Alexcee-Hughes,

Rory Cleveland, Pascal Gysi, Joey Meraw, Matt Ram and Kara Ritchie logged 33 hours of footage and had to edit this down to a 45 minute video.

The students were initiated into the filmmaking world with hands-on workshops, followed by the actual filming, downloading this onto a high gig hard-drive before the time-consuming editing process began with the added creative work of sound mixing and titles.

Mentors included: Brook Roberts, Andrew Meerza, and Fred Bird plus David Bercovici from the lower mainland.

Financial support came from: Shuswap Community Foundation, School District #83, Mediability and the Salmon Arm Folk Music Society.

A \$2,500 grant from Shuswap Community Foundation came from the Salmon Arm Savings and Credit Union Youth Endowment Fund and the Youth and General Funds.



Hearty Lunches



Lee Rawn (left) and Theresa Reidford, members of the Canadian Mental Health Association “cooking team,” take a batch of oatmeal cookies out of a new oven in time to serve a hearty lunch to nine people.

A \$2,000 grant from Derkaz/Derby Family Endowment Fund and General fund allowed the Salmon Arm & District Branch of CMHA to purchase a new oven and refrigerator for the branch’s kitchen in downtown Salmon Arm.

Lee says all lunch meals are planned and prepared in their kitchen and they also teach people the basics of healthy and economical cooking. Around eight or nine people arrive each day for lunch, although they sometimes serve up to 15 people. Cost is affordable at \$2.50. Cookies and coffee are also available at a reasonable price on the lower floor of CMHA.

Wheels to Meals Warms Seniors

A hot meal on a cold winter’s day is a welcoming occasion and, for seniors in Sicamous, the Wheels to Meals program at the Haven is a popular meeting place year ‘round.

Operating under the aegis of Eagle Valley Senior Citizens Housing Society, the Wheels to Meals program provides nutritious lunches every Tuesday and Thursday for some 60 people. Meals are also delivered to housebound seniors.

The purchase of 15 new tables, plus upgrades to kitchen shelving and refitting the serving area was made possible through a Shuswap Community Foundation grant of \$3,400 provided by the C. Norman Barber Fund and the Seniors Project Fund.

Foundation directors had the pleasure of dropping in during a luncheon this spring. Clyde Tucker, past president of the Foundation, commented on the wonderful changes to the facilities and added that it was a treat for directors to see how the grant money has been put to use.



Joan Willey (left) and Lois Higgins (right) share a joke with seniors at the Wheels to Meals program in Sicamous.



Engaging Families in Visual Arts



The Shuswap Art Gallery Association (SAGA) is always trying to find new ways to engage families in the visual arts. A \$1,270 grant from the Gertrude and Ludwig Klein Memorial Fund and the General Fund funded a new “Be An Art Family” membership program.

The first workshop in November 2007 was “Reconstructing T-shirts” led by local youth artist Risa Bissenden. Families at subsequent workshops have drawn a family portrait, built birdhouses and created mosaic tiles for the Ross Street Plaza fountain.

Tracey Kutshchker, SAGA’s administrator, describes the response to the program as “fantastic” with workshops filling up fast.



Family Learning Centre Opens

The Family Learning Centre at Salmon Arm West School held its official opening in December 2007 with a round dance, storytelling by First Nations Teacher-Counsellor, Meredith Rusk, and freshly baked bannock made by grandparent Linda Gaze.



Storyteller Meredith Rusk and her puppets, Bear and Coyote, tell the tale of how Bear lost his tail.

A new program, the Family Learning Centre is open to children up to five years old plus their parent or caregiver. This free program is an opportunity for a child to learn early literacy, social, emotional, physical and cognitive development through play with carefully selected materials and activities. The program is under the guidance of Early Childhood Educator, Mary Regier.

The Centre serves the entire Salmon Arm region.

Purchase of toys and furnishing for the Centre was made possible by a \$5,000 grant from the Foundation’s Wainwright-Mobley Memorial Fund and the General Fund. The program is supported by School District #83 and, in principle, by the Adams Lake Indian Band and the Neskonlith Lake Indian Band.



Foundation Donors



George and Nancy Clark

The Clarks had a very keen sense of community and of the importance of contributing to the health of the place you live in order to make it a better community, a better country, and a better world. Their values were reflected in everything they did.



Mary Douhaniuk

In her memory and with her blessing her brother, Bill, presented Shuswap Community Foundation with \$70,000 to establish a

permanent endowment fund. He says that it was her wish that the income from the fund go towards: medical equipment; social justice initiatives; support for arts and culture; and charitable works of a general nature.



Anonymous

Douglas and Donna Adams

Freda and Eric Aitken

Edward and Wendy Apted

Dorothy Askew

Ron and Joyce Aubert

BDO Dunwoody LLP

Janice Belding

Dale Berger

Judy Birkhiem

Gordon Bjorkman

Donna and David Booth

Liz and Rob Borthwick

Gary Brooke and Sunni Berger

Marilyn Brown

Laura Burkitt

Burrard Acura

Gerry and Rita Chu

City of Salmon Arm

Patricia Delmore-Ko

Cindy Derkaz and Don Derby

Nina Dickins

Zoe Doeber

Edgar and Patricia Drew

Alice Duck

Ian Duncan and Maureen Stickney

Norm and Ruth Embree

Estate of Elisabeth Thomi

Arleene Fennig

Malcolm Fowler

Catherine Gillick

Ed Grainger

Janet Hanna

Betty E. Harper

Helene Hatanaka

Dorothy Hawkes

Harry and Lois Higgins

Ed and Naomi Hinman

Rick and Linda Hirtle

Ben and Lisa Honcoop

Nancy A. Hopf

Micheline Houle and David Barnard

Joseph Johnson

Dale Johnston

Gabriele Klein

Beatrice Lappin

Frances Laws

Chris and Tina Letham

Charles and Joyce MacDonald

Linda MacDonald

Muriel MacKenzie

Edward and Marlene McDonald

Ken McKee

Georgia McLeod and Dick Riach

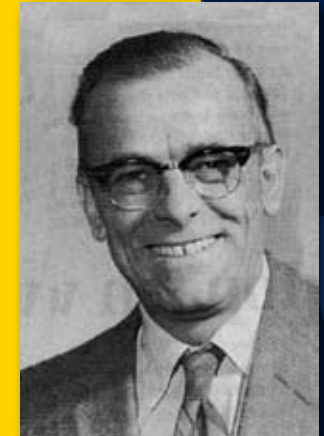
Foundation Donors

Clare Meunier
 Judy Moore
 D. Brian Morris
 Doris Murray
 Thomas and Karen Nayki
 Al Neale
 Shannon O'Neill
 Evelyn Painter
 Robert and Michelle Papworth
 Donald and Dorothy Parks
 Janet Pattinson
 L.A. Penner
 Barbara Peterson
 Bill and Alice Phillips
 Robert and Patricia Priest
 Matt and Elizabeth Pryhitko
 Regan Ready
 Henriette and Glen Ritchie
 Robert Robertson
 Rocky's Sandblasting
 Salmon Arm Kinette Club
 Salmon Arm Museum and
 Heritage Association
 John and Irene Sansom
 Jeanette and Don Sawyer
 Sally Scales
 School District 83 N.Okanagan-
 Shuswap

Rosemary Schubert
 Muriel Schubert
 Scotiabank and Scotiabank
 Dealer Finance Centre
 Ralph and Marian Segreto
 Marg Shand
 Shanto Dental Ceramics
 Shuswap Art Gallery Association
 Shuswap Coordinating Training Society
 Shuswap Film Society
 Shuswap Hospice Society
 Shuswap Naturalists Club
 Terry Smuin
 Donald R. Smuin
 Sorrento Lions Club
 St. John's Church
 Shirley and Wilbert Stewart
 Melvin and Carol Stratton
 TD Canada Trust
 Thompson Okanagan
 Network Arts Council
 Clyde and Shirley Tucker
 Emily Turgeon
 Ramona Wainwright
 Ita Whittaker and Ruben Orr
 Victor P. Whittaker
 David Wood

Walter Ellaschuk

In setting up the Walter Ellaschuk Memorial Bursary Fund, his wife Vera, said: "this is what he would have wanted. He had no use for ritual, but he did value education. . . . This is emblematic of his life, his ideals. He was always dedicated to helping youth get ahead."



C. Norman Barber

Norman absolutely loved his adopted community of Sicamous, according to his daughter, Suzanne Heigh. Norman made a decision a few years ago to make a one-time lump sum gift to Shuswap Community Foundation of \$45,000. Income will be used to support projects or activities, including health care, primarily of benefit to seniors primarily in the Sicamous area.





Ernie Braby

Ernie was born in 1921 in Sunderland, England. As the Second World War broke out he joined the Royal Air Force. After the war, he immigrated to Canada, first joining a brother in Vancouver and then coming to Salmon Arm to work as a mechanic in a local garage. In 1952, Ernie married a local girl, Kay Loring.

In 1960, Ernie opened his own business and took over the newly built Chevron station. In addition to operating the service station, he soon acquired a car agency and sold cars as well as served gas.

In 1964, he bought a failing American Motors dealership located west of town, where the present Braby Motors dealership operates. He retired in 1982 when his two sons took over the operation.

He had a strong sympathy for the “working man”, was a true socialist and remained a card-carrying NDP member to his death.

Ernie died on January 18, 2008.

Please read the full story in our Memory Book:
www.shuswapfoundation.ca



In Memoriam

Lloyd Askew
 Barbara and Marcel Asquin
 C. Norman Barber
 Carol Berger
 William Bews
 Blair Borden
 Bertha Boswell
 Ernie Braby
 Joan and Gordon Brooke
 Marion and Jack Brooke
 Nick Brown
 Tom Brush
 Doug Burkitt
 Nancy and George Clark
 Morris George “Butch” Clifford
 Dr. Barry Deakin
 Betty-Jean and Walter Derkaz
 Margaret Doe
 Mary Douhaniuk
 Sinclair Dunnett
 Walter Ellaschuk
 Enid Finn
 Art Fraser

Jack Gillick
 Guy Graham
 Bob Griffiths
 Dr. Eve Gulliford
 Bob Hall
 Eleanor Hall
 Stephen Heal
 Dr. Laura Hiscock
 Vicki Hitchen
 Lawrence Huntley
 Tomas Idzan
 Barbara Jeffrey
 Peggy Kernaghan
 Gertrude and Ludwig Klein
 Dr. Bert Letham
 Phyllis Lipsett
 Pauline Lovegrove
 Bill MacDonald
 Marie Manson
 Peggy Marsden
 Dick Marshall
 Gordon Marshall

Donald Matthews
 Ross McLeod
 Mary (Coles) Michell
 Maj. Charles Wm & Laura Mae Mobley
 Ruby and Howard Mobley
 John Monk
 Jim Morris
 Nathan Nash
 Joyce O'Neill
 Len O'Neill
 Betty and Alan Paterson
 Mattie Persson
 Floyd Peterson
 Jennifer Phillips
 Gordon Priestman
 Shane Ready
 Carson Everett Reynard
 Janet Riley
 Mary Romeril
 Agnes Rudeen
 Sigmund Schubert

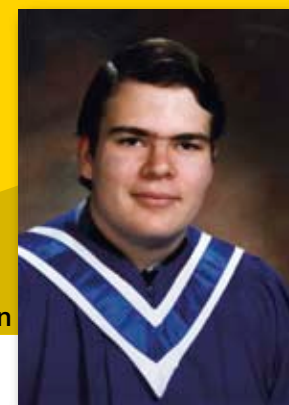
Joe and Catherine Shay
 Sieg and Louise Silver
 Donald Sinclair
 Frank and Rita Smuin
 Gene Spence
 Shirley Stewart
 David Stratton
 Geoff Suddaby
 Brian Volker
 James Howard Wainwright
 James Ross Wainwright
 David Walters
 Mati Walters
 Helena Wickett
 Dr. Ralph Williams
 Wayne Williamson
 Chris and Eve Wright



Sig Schubert



Barbara Asquin



David Stratton



Foundation Founders

The Askew Family
Wendy and Edward Apted
Muriel and Frank Barnard
Marcia and Jim Beckner
Margaret and Sid Bedwell
Thomas Bowers (In Memoriam)
Gayle and Jack Bowers
The Braby Family
Elsie and Tom Brighthouse
Sunni Berger and Gary Brooke
Wendy and Greg Browne
Margery and Leon Carter
Rita and Gerry Chu
Nancy and George Clark
Pauline ("Peg") Clarke
Cindy Derkaz and Don Derby
Nina Dickins
Margaret and Ernie Doe
Brooke, Jackson, Downs
Kari Dukeshire and Bernie Weare
Ian Duncan
Mary and Reid Fowler
Edith and Edward Fountain (In Memoriam)

Joyce and John Henderson
Lois and Harry Higgins
Joan and Colin Hill
Linda and Rick Hirtle
Annie and RW Holliday (In Memoriam)
The Hucul Family
Bobbi and Joe Johnson
Linda and Bill Laird
The Letham Family
The MacKenzie Family
Peggy and Ed Marsden
Joan and Denis Marshall
Lil and Ken McKee
Laura Middleton
Ivy and Sam Miller (In Memoriam)
Ingrid and John Monk
Agnes and Morrie Morrison
Doris and Norman Murray
Jennie and Vic Nancollas (In Memoriam)
Ray Newnes
Elizabeth Louise Ozeroff
Michelle and Robert Papworth

Betty and Allan Paterson
Hjalmar Peterson
Hubert Peterson
Holly and Shane Ready
The Ritchie Family
Salmon Arm Observer
Salmon Arm Savings and Credit Union
Jim Scales
Marian and Ralph Segreto
Catherine and Joseph Shay
Mavis and Dick Smith
Barbara Strohan
Bonnie and Graham Threlkeld
Dr. Tess Trueman
Shirley and Clyde Tucker
The Ronald Turner Family
Maud and Robert Turner (In Memoriam)
The Ujimoto Family
Lynn and Ian Wickett
Eve and Chris Wright



Featured Founders

Morrie & Agnes Morrison

Morrie and Agnes Morrison are two of the Foundation's founders. In fact, Morrie says he and fellow founder Denis Marshall "cooked up the idea" of inviting founders for the brand new foundation less than a dozen years ago.

They had hoped for 20 to 25 people to give a minimum of \$1,000 each. "It caught fire" says Morrie and grew to 65 founders. With over \$76,000 –all in discretionary funds– the fledgling foundation was on its way.

Morrie served on the Foundation's board in the early years and recalls "We were a small but strong group of dedicated people setting the course. I took to it. It was such a good concept for the community and I wanted it to succeed."

No stranger to boards, Morrie was a senior vice-president of



the Royal Bank of Canada (in charge of 600 bank branches in Ontario) when he retired in 1984. He served on the executive of many not-for-profit organizations including Metropolitan Toronto and Region Conservation Foundation (chairman), Traffic Injury Research Foundation of Canada (vice-president), Canadian Cancer Society (national director), United Way of Greater Toronto, Advisory Committee of Doctors' Hospital, and Ontario Chamber of Commerce (president) and the Lions Club. After moving to

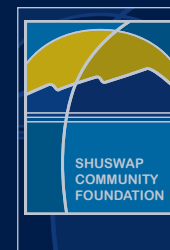
Shuswap Lake Estates, Morrie continued to be an active volunteer with many organizations including the Sorrento Lions Club, St. Mary's Anglican Church, Canadian Cancer Society and the Foundation.

Agnes was born in Salmon Arm. Her father farmed here until Agnes was 7 years old, when the family moved to Vancouver. She met Morrie after the war when he was attending UBC.

Agnes and Morrie celebrated their 60th wedding anniversary in 2007. They have three children.

It is with sadness that we report Morrie's passing on May 28, 2008.

Please read the full story in our Memory Book
www.shuswapfoundation.ca



Saving While Giving

Did you know that the May 2, 2006 federal budget made it attractive to gift securities to registered charities? Charitable donations of publicly listed securities (typically stocks, bonds and mutual funds) are now exempt from capital gains triggered as a result of the gift.

By donating securities directly to Shuswap Community Foundation you can eliminate tax on any accrued gain and you will receive a charitable donation receipt for the full market value of the donated securities. Many donors are taking advantage of this cost effective way to give a gift to their community.

Family Funds

Meeting ever-changing needs of our community

When you establish a Family Fund with Shuswap Community Foundation, your gift can address a broad range of local needs — including future needs that often cannot be anticipated at the time your gift is made. We consider all aspects of community well-being: arts and culture, education, environment, health, heritage, animal welfare, social programs, and more.

Because Shuswap Community Foundation never spends the capital of your gift, the income earned on your fund can be used to support the community in perpetuity: a gift that keeps on giving.

You will find that Family Funds are a convenient, flexible and cost-effective way to create a family legacy of giving and teach “giving values” to the next generation.

How it works:

- You make a gift to the Shuswap Community Foundation during your lifetime or through a bequest in your will. You can give cash, stocks, insurance, or other assets.
- We set up a fund in your name, in the name of your family or business, in honour of any person or organization you choose, or anonymously.
- By working with members of our board to establish your fund, you may direct your donation to support areas of interest that your family cares about most.
- You receive tax benefits in the year your gift is made.
- We handle all the administrative details.
- We invest your gift and use the interest to issue grants in the name of your fund. Your gift is a permanent source of community capital, helping to do good work forever.
- Your family and friends can continue to support your vision by also making donations to your fund.



A Gift with Some Strings Attached

Salmon Arm resident, Gabriele Klein, has discovered a way to achieve one of her long-term philanthropic goals by donating shares to Shuswap Community Foundation. And she will be able to take advantage of the significant tax benefits available to a donor who gives publicly traded securities (stocks or bonds) to a registered charity.

In 2003 Klein established the Gertrude and Ludwig Klein Memorial Fund with the Foundation to celebrate the lives of her parents. Income from the fund supports endeavours that foster world peace, the environment, the arts and sport: life-long passions of the Klein family.

Now with Klein's donation of shares to the family endowment fund, a portion of the income will be used to support an annual sponsorship for a first violin chair for Okanagan Symphony Society. Happily this will be the "core violin seat" currently occupied by Shuswap musician Susan Aylard of Sorrento. This is a fitting way to remember Klein's parents who were strong supporters of the Okanagan Symphony and were among the first subscribers in Salmon Arm.

For several years Klein had mulled over the idea of funding a chair with the symphony, but it's absence from the Shuswap had put her idea on the "back burner". However, she notes, the symphony has overcome recent challenges, retired a 5-year debt and now has a "fantastic new conductor, Rosemary Thomson, who really connects with the audience", and has plans in the "not too distant future" to perform in Salmon Arm.

Excited about the possibilities ahead, Klein is an example of a generous, community-minded person working with the Foundation to realize long-term financial goals through a family endowment fund. Klein notes, "This is a simple and cost effective alternative to establishing a private foundation."

Commenting on the recent donation, president Cindy Derkaz states, "We are thrilled to see families embracing the concept of the Foundation as a way to support their passions and enrich their community in perpetuity."





Elisabeth Thomi and her dog "Buddy"
in a picture taken July, 2001.
Photo courtesy: Dorothy Hannebauer.

Elisabeth Thomi

Elisabeth Thomi was born in Bern, Switzerland, on April 3, 1922 and died in Salmon Arm May 29, 2007, at age 85.

She came to Canada in 1955 and worked for John Federer, an orchardist, who lived on North Broadview. Federer, who was also a Swiss, bequeathed the land to Elisabeth upon his death and she continued to operate the almost 35 acres for fruit, hay and honey production.

Salmon Arm resident Dorothy Hannebauer went to work for Elisabeth in 1974 thinning and picking apples and cherries. Over the years the two women became friends and Dorothy continued to work with Elisabeth every summer for the next 17 years.

She was a great animal lover, recalls Dorothy, who counted 13 cats and four dogs when she first came to the orchard. In her later years, Elisabeth gave regularly to the local SPCA and, upon her death, the SPCA took the last three cats and a special dog named Buddy. Buddy had survived a nasty encounter with a coyote and Dorothy says she was pleased when a retired couple adopted the animal. Elisabeth's house dog, Missy, died a few days after her owner and Dorothy believes the animal "died of a broken heart."

Shuswap Community Foundation received a substantial bequest of 2/3rds of the residue of Elisabeth Thomi's estate. The money has established the Elisabeth Thomi Endowment Fund with the annual income to be paid to the Shuswap Branch of the SPCA. Thanks to the generosity of Elisabeth Thomi, the Foundation's capital fund now exceeds \$3 million.

Please read the full story in our Memory Book:
www.shuswapfoundation.ca

Catherine Ann Dilworth



Catherine Ann Dilworth was born in Kamloops on January 27, 1905. She was the daughter of British parents who met in Canada.

When Catherine's parents, John Dilworth and Kate McLaughlan, were married in Vancouver on January 8, 1902, John gave his address as the "Village of Kault".

Catherine's parents acquired a tract of land on the west side of Sorrento to develop a family farm. It is called the Dilworth farm to this day. The land, once known as "Maplehurst Ranch", took many years to develop as it was cleared by hand.

Following in the footsteps of her mother to dedicate her life to others, this sensitive, soft spoken and gentle young lady decided in the early 1920's to become a registered nurse. By 1929, Catherine had graduated with honours from the Kamloops Hospital Academy of Nursing. She practised nursing in the Kamloops Hospital and then later moved to work at the B.C. Tranquille Sanitarium for Consumptive Patients about ten miles from Kamloops.

She nursed in Vancouver for a number of years before moving to San Francisco, California, where she worked until the end of the 1960's. She retired and returned to Sorrento to care for her ninety-year-old mother.

In 1998, Catherine Dilworth moved to Bastion Place care facility in Salmon Arm. The staff there recalled her as a gracious and undemanding lady who was so very appreciative that made it very easy to do the little extras for her.

Catherine Dilworth passed away peacefully in Bastion Place in Salmon Arm on April 3, 2005 at the grand age of 100 years.

Please read the full story in our Memory Book:
www.shuswapfoundation.ca

Catherine's Legacy

November 15, 2007, was National Philanthropy Day in Canada.

By a happy coincidence, it was also the day the Sorrento Lions Club presented a cheque for \$75,451 to Shuswap Community Foundation, bumping the Foundation's total capital over the \$2 million mark.

In 2005 Catherine Dilworth, a longtime resident of the South Shuswap community, bequeathed a substantial portion of the residue of her estate to the Lions Club and requested the money be used for the betterment of the community.

And the Lions Club did just that! In addition to the gift to the Foundation, they gave over \$174,000 to the Shuswap Lake Hospital Foundation's CT Scanner Fund.

Shuswap Community Foundation used the gift to establish a permanent endowment fund known as the "Sorrento Lions Club-Catherine Dilworth Memorial Endowment Fund."



Clyde Tucker, Shuswap Community Foundation past president, is flanked by in-coming Sorrento Lions president Larrie Grant (left) and past president Don Burgoyne (right), as they complete signing the Deed-of Gift for \$ 75,451.05 setting up a permanent endowment fund known as the "Sorrento Lions Club-Catherine Dilworth Memorial Endowment Fund."



Frank & Rita Smuin

Married in 1948 and living the early years of their married life in Beavermouth and West Summerland, Frank and Rita Smuin arrived in Salmon Arm in January 1954. It was the beginning of more than 50 years residency in Salmon Arm. Frank, who had joined the CPR following his demobilization from the RCAF at the end of WWII, was a Telegraph Operator while Rita was a Telephone Operator with BC Tel.

Frank spent more than 15 years at the CPR station on Front Street (now Lakeshore Drive) in Salmon Arm until he moved to Enderby as the station agent and then to a mobile supervisor position covering the Shuswap sub-division of the CPR. Frank enjoyed woodworking and over the years developed quite a wood shop in the basement of their home.

They stressed the need for education and always believed that the teachers of the Salmon Arm school district provided a first class education for their children. They both sacrificed many things to ensure that their three sons received post secondary educations.

When Rita passed away in 2001, Frank set up the Rita Smuin Memorial Bursary Fund.

Each year a bursary will be paid to a student entering post-secondary studies in health care, with a preference to a student intending to become a registered nurse. During her illness Rita was impressed with, and grateful for, the care and attention that she received. "Nurses," she told Frank "are very special people." This caused Frank to wonder what he could do to say thanks and to recognize the dedication displayed by nurses who cared so thoughtfully for Rita.

With Frank's passing in 2006, his sons Ken, Don and Terry wanted to honour their father along with their mother by adding to the fund and renaming it the "Frank and Rita Smuin Memorial Bursary Fund".

Please read the full story in our Memory Book www.shuswapfoundation.ca



Arts Renaissance Fund Benefits Park

The late Floyd Peterson had a dream to make a donation to the Salmon Arm Museum & Heritage Association but he passed away in his sleep in September, 2007. He and his family had a special interest in Haney Heritage Park and over the years they watched the development of Haney Village and were keen supporters. The family donated time, money and artifacts.



Floyd's wife, Barbara, followed through with his dream by donating a generous gift to an endowment fund managed by Shuswap Community Foundation.

The new fund took advantage of matching funds from the BC Arts Renaissance Fund, a provincial initiative to encourage local endowments to grow. The Arts Renaissance Fund was established in 2005 with a \$25 million commitment from BC Government administered by the Vancouver Foundation.

The community responded generously to add to the Peterson's gift. With only a couple of months before the deadline to apply for matching funds, the Heritage Association raised over \$75,000 which, with the matching funds, brought the total endowment fund to \$150,000.

Fund Launches Website at RJ Haney Heritage Village

By Deb Chapman, Museum Curator

Bev Marshall has a sparkle in her voice when she talks about her recent introduction to website design. She admits her computer knowledge isn't sophisticated but realizes the 'Net can be a valuable tool. Staff at Haney Heritage Village agree. They want to get a message out and feel fortunate that Bev Marshall is willing to help.



Thanks to a generous grant from the Foundation, Haney Heritage Village's website has been updated. Funding came in part from the interest earned on the Gordon and Bev Marshall Family Endowment Fund, established by the family in memory of Gordon, a member of the Vintage Car Club who was also fascinated with activities at Haney Heritage Village.

Museums and historical organizations, like any service industry, have to be in touch with patrons, researchers and markets. As part of a marketing strategy, they use the internet to advertise programs, services and events. Reaching a worldwide audience can only be good for business.

"We need to market the operations side of activities at the Village better," said General Manager Gary Cruikshank. "We're really pleased to be moving forward with this new website... When the first bride-to-be called from Montreal, we knew we were on to something!"

Please read the full story on our Projects Page www.shuswapfoundation.ca

Bev Marshall launches a new website, at Haney Heritage Park, with a little technical support from Clyde Tucker, past president of the Foundation.



Capital Fund

DEDICATED FUNDS

Agency Funds	2008	2007
Anglican Parish of Salmon Arm-Sicamous Endowment Fund	\$2,950	
City of Salmon Arm Endowment Fund	\$60,213	\$52,727
Okanagan College Foundation	\$100,000	\$100,000
Salmon Arm College Scholarship Fund	\$153,176	\$148,831
Nancy and George Clark Memorial Fund		
Vicki Hitchen Memorial Fund		
Len O'Neill Memorial Fund		
Salmon Arm Museum and Heritage Association		
Endowment Fund	\$168,098	\$18,640
Peterson Family Fund		
School District #83 Endowment Fund	\$53,835	\$53,835
Shuswap Art Gallery Association Endowment Fund	\$239,850	\$204,764
Shuswap District Arts Council Endowment Fund	\$64,410	\$59,384
Blair Borden Memorial Fund		
Shuswap Hospice Society Endowment Fund	\$31,200	\$29,492
Donor Directed Funds		
Shuswap Branch, B.C.S.P.C.A. Endowment Fund	\$33,915	\$24,865
Al Neale and Beryl Herdan		
Peggy Kernaghan (In Memoriam)		
Sigmund Schubert (In Memoriam)		
Nick and Marilyn Brown Family Fund	\$2,517	\$1,000
Tom Brush Memorial Scholarship Fund	\$11,693	\$11,743
Walter Ellaschuk Memorial Bursary Fund	\$25,000	\$25,000
Stephen Heal Memorial Scholarship Fund	\$11,198	
Tomas Idzan Memorail Bursary Fund	\$10,474	\$10,474
Salmon Arm Kinsman and Kinette Fund	\$32,877	\$32,000
Marie Manson Memorial Arts Award	\$26,162	\$26,062
Nayki/Greer Family Endowment Fund	\$9,880	
Al Neale Bursary Fund	\$49,000	\$37,873
Janet Pattinson - Shuswap Naturalist Club Bursary	\$13,202	
Ready Family Endowment Fund	\$13,135	\$12,600
Centennial Reunion Scholarship Fund	\$4,686	\$4,686
Shuswap Lake Health Care Foundation	\$8,059	\$7,059
Doug Burkitt (In Memoriam)		
Joyce O'Neill		
Frank and Rita Smuin Memorial Bursary Fund	\$16,100	\$10,100
Elisabeth Thomi Endowment Fund	\$920,929	
Eve and Christopher Wright Scholarship Fund	\$10,996	\$10,781
Total Dedicated Funds	\$2,073,555	\$881,916

DISCRETIONARY FUNDS

Field of Interest Funds	2008	2007
Administrative Endowment Fund	\$56,209	\$52,226
Mary Douhaniuk Memorial Fund	\$70,000	\$70,000
Enid Finn Memorial Fund	\$6,610	\$6,193
Gertrude and Ludwig Klein Memorial Fund	\$30,415	\$11,005
Bill MacDonald Memorial Fund	\$7,154	\$6,804
Jennifer Phillips Memorial Fund	\$44,908	\$43,683
Ev Painter Endowment Fund	\$12,000	\$11,000
Salmon Arm Savings and Credit Union		
Youth Endowment Fund	\$13,000	\$13,000
Salmon Arm Schools Legacy Fund	\$10,000	
Seniors Project Fund	\$20,419	\$20,419
Sorrento Lions Club - Catherine Dilworth Memorial		
Endowment Fund	\$75,451	
David John Stratton Memorial Bursary Fund	\$10,000	
Wayne Williamson Memorial Fund	\$3,242	\$3,242
Youth Endowment Fund	\$12,024	\$11,674
Bill Kernaghan (RCAF) Fund		
Community		
Lloyd and Dorothy Askew Family Endowment Fund	\$62,152	\$42,435
C. Norman Barber Fund	\$45,000	\$45,000
Browne Johnson Legacy Fund	\$20,084	\$10,000
Derkaz/Derby Family Endowment Fund	\$22,374	\$21,190
General Fund	\$378,519	\$357,642
Founders Fund		
Dr. Tess Trueman Endowment Fund		
Gordon and Bev Marshall Family Endowment Fund	\$10,720	\$10,720
John and Ingrid Monk Endowment Fund	\$61,312	\$61,312
Wainwright-Mobley Memorial Fund	\$113,752	\$108,741
James Ross Wainwright, Howard & Ruby Mobley,		
Major Charles Wm. & Laura Mae Mobley,		
James Howard Wainwright (In Memoriam)		
Bertha Boswell		
Total Discretionary Funds	\$1,085,346	\$906,286
Total Dedicated Funds	\$2,073,555	\$881,916
TOTAL CAPITAL FUND	\$3,158,901	\$1,788,202



Ten reasons people choose to give through community foundations

one

We are a local organization with deep roots in the community.

two

Our board and advisors have broad expertise regarding community issues and needs.

three

We provide highly personalized service tailored to each individual's charitable and financial interests.

four

Our funds help people invest in the causes they care about most.

five

We accept a wide variety of assets, and can facilitate even the most complex forms of giving.

six

We partner with professional advisors to create highly effective approaches to charitable giving.

seven

We offer maximum tax advantage for most gifts under federal law.

eight

We multiply the impact of gift dollars by pooling them with other gifts and grants.

nine

We build endowment funds that benefit the community forever and help create personal legacies.

ten

We are a community leader, fostering collaboration on issues of broad interest to create positive change.



2008 Grants

Discretionary Grants

Grant Recipient	Grant	Project	Fund
Browne Johnson Legacy Fund	\$532	Earnings re-invested in this new fund	Browne Johnson Legacy Fund
Canadian Cancer Society Shuswap Area	\$500	Salmon Arm Emergency Aid Program	Bill MacDonald Memorial Fund
Canadian Mental Health Association	\$4,000	Renovation project to move kitchen	Mary Douhaniuk Memorial Fund and General Fund
Eagle Valley Senior Citizens Housing Society	\$4,000	Purchase new kitchen equipment for seniors' meals program	C. Norman Barber Fund and Seniors Project Fund
Malakwa Community Centre Association	\$3,000	Drill a water well for community hall	John and Ingrid Monk Endowment Fund and General Fund
North Shuswap Community Association	\$2,500	Install vault toilets for community park	Derkaz/Derby Family Endowment Fund and General Fund
Okanagan College	\$1,000	Support for participants in literacy programs	Ev Painter Endowment Fund
RCAC Shuswap Squadron Sponsoring Committee	\$2,500	Citizenship tour for air cadets	SASCU Youth Endowment Fund and Youth Endowment Fund
Salmon Arm Bay Nature Enhancement Society	\$1,200	Printing of new brochures	Gertrude and Ludwig Klein Memorial Fund and General Fund
Salmon Arm Museum and Heritage Association	\$3,000	Install storm windows at R.J. Haney House	Lloyd and Dorothy Askew Family Endowment Fund and General Fund
Salmon Arm Schools Legacy Fund	\$151	Earnings re-invested for future grant	Salmon Arm Schools Legacy Fund
Shuswap Area Family Emergency Society	\$5,000	Furnish a secure children's area and a quiet room for seniors	Wainwright-Mobley Memorial Fund and General Fund
Shuswap Association for Community Living	\$5,000	Install a new furnace	General Fund
Shuswap Branch BCSPCA	\$1,000	Spay cat program	Gordon and Bev Marshall Family Endowment Fund and General
Shuswap Children's Association (Shuswap Early Childhood Development Committee)	\$1,000	Print an updated edition of the Children's Services Directory	Jennifer Phillips Memorial Fund
Shuswap Community Foundation	\$2,571	Support for the Foundation's operations	Administrative Endowment Fund
Shuswap District Arts Council	\$5,000	Purchase a colour photocopier/printer for the Arts Centre and member groups	General Fund
Shuswap District Arts Council (Salmon Arm Pottery Club)	\$500	Purchase of a pottery wheel	General Fund
Shuswap District Arts Council (Sicamous Visual and Performing Arts Society)	\$800	Mozart's Requiem performance	Enid Finn Memorial Fund and General Fund
Shuswap Estates Community Association (Shuswap Lake Estates Play Group)	\$2,500	Provide facilitator, supplies and rent for child and parent play group	Wainwright-Mobley Memorial Fund
Shuswap Family Resource and Referral Society	\$2,000	Provide baby food kitchens in Salmon Arm, Enderby and Sicamous	Jennifer Phillips Memorial Fund and General Fund
Shuswap Volunteer Search and Rescue	\$2,000	Purchase of a rescue boat	Sorrento Lions - Catherine Dilworth Memorial Endowment Fund
	\$500		Wayne Williamson Memorial Fund
Total Discretionary Grants	\$50,254		

Donor Directed and Agency Grants

Grant Recipient	Grant	Project	Fund
Anglican Parish of Salmon Arm - Sicamous Endowment Fund	\$67	Earnings re-invested in this new fund	Anglican Parish of Salmon Arm - Sicamous Endowment Fund
City of Salmon Arm Endowment Fund	\$2,526	Earnings re-invested to support distribution of annual City grants	City of Salmon Arm Endowment Fund
David John Stratton Memorial Bursary Fund	\$226	Earnings re-invested for School District #83 award in future	David John Stratton Memorial Bursary Fund
Janet Pattinson - Shuswap Naturalist Club Bursary Fund	\$271	Earnings re-invested in this new fund	Janet Pattinson - Shuswap Naturalist Club Bursary Fund
Nick and Marilyn Brown Family Fund	\$59	Earnings re-invested in this new fund	Nick and Marilyn Brown Family Fund
Okanagan College Foundation	\$2,000	Nancy Clark Memorial Award to Dannielle Douglas and Sanne VanVierken	Okanagan College Foundation Fund
Okanagan College Foundation	\$2,000	George Clark Memorial Award to Daniel Snoek and Jeff Dobson	Okanagan College Foundation Fund
Salmon Arm College Scholarship Trust	\$2,000	Award to Patrician Anderson and Carmell Golnick	Al Neale Bursary Fund
Salmon Arm College Scholarship Trust	\$500	Award to Alison Black	Eve and Christopher Wright Scholarship Fund
Salmon Arm College Scholarship Trust	\$1,200	Vicki Hitchen Memorial Award to Juliane Brewer	Salmon Arm College Scholarship Trust Fund
Salmon Arm College Scholarship Trust	\$750	Len O'Neill Memorial Award to Justin Crandell	Salmon Arm College Scholarship Trust Fund
Salmon Arm College Scholarship Trust	\$500	Award to Jackie Brown	Tomas Idzan Memorial Bursary Fund
Salmon Arm Family Emergency Society	\$293	Earnings to Salmon Arm Family Emergency Fund	Ready Family Endowment Fund
Salmon Arm Museum and Heritage Association	\$3,732	Earnings to Salmon Arm Museum and Heritage Association	Salmon Arm Museum and Heritage Association Endowment Fund and Peterson Family Fund
School District #83	\$200	Award to Bryn Ready	Centennial Reunion Scholarship Fund
School District #83	\$600	Award to Jenna Spooner	Frank and Rita Smuin Memorial Bursary Fund
School District #83	\$1,800	Award to Siri Hermanski	Kinsmen and Kinette Scholarship Fund
School District #83	\$167	Earnings re-invested for School District #83 award in future	Nayki/Greer Family Endowment Fund
School District #83	\$2,509	Earnings to School District #83	School District No. 83 North Okanagan - Shuswap Endowment Fund
School District #83	\$600	Award to Derek Kuchta	Tom Brush Memorial Scholarship Fund
School District #83	\$2,200	Award to Marisa Hart, Dawn Hooper and Dylan Lidquist	Walter Ellaschuk Memorial Bursary Fund
Shuswap Art Gallery Association	\$10,299	Earnings to the Shuswap Art Gallery Association	Shuswap Art Gallery Association Endowment Fund
Shuswap Branch BCSPCA	\$20,831	Earnings to Shuswap Branch BCSPCA	Elisabeth Thomi Endowment Fund
Shuswap Branch BCSPCA	\$167	Earnings to Shuswap Branch BCSPCA	Nayki/Greer Family Endowment Fund
Shuswap Branch BCSPCA	\$1,240	Earnings to Shuswap Branch BCSPCA	Shuswap Branch BCSPCA Endowment Fund
Shuswap District Arts Council	\$1,000	Award to Miranda McLaws and Niina Teto	Marie Manson Memorial Art Award Fund
Shuswap District Arts Council	\$1,000	Blair Borden Memorial Award to Karen Fong and Siobhan Raupach	Shuswap District Arts Council Endowment Fund
Shuswap District Arts Council	\$1,692	Earnings to Shuswap District Arts Council	Shuswap District Arts Council Endowment Fund
Shuswap Hospice Society	\$293	Earnings to Shuswap Hospice Society	Ready Family Endowment Fund
Shuswap Hospice Society	\$1,428	Earnings to Shuswap Hospice Society	Shuswap Hospice Society Fund
Shuswap Lake Health Care Foundation	\$357	Earnings to Shuswap Lake Health Care Foundation	Shuswap Lake Health Care Foundation Fund
Stephen Heal Memorial Scholarship Fund	\$84	Earnings re-invested for School District #83 award in future	Stephen Heal Memorial Scholarship Fund
Total Donor Directed and Agency Grants \$62,591			

Total Grants for 2008 \$112,845

Financials

Statement of Financial Position June 30, 2008 with comparative figures for 2007



ASSETS

	2008	2007
Current assets		
Cash & cash equivalents	\$380,696	\$253,249
Accounts receivable	24,096	18,321
	<hr/> 404,792	<hr/> 271,570
Investments at market	2,819,382	1,597,662
	<hr/> \$3,224,174	<hr/> \$1,869,232

LIABILITIES AND FUND BALANCES

Current Liabilities		
Grants and accounts payable	\$1,774	\$1,300
Unearned revenue	6,400	750
Funds held for third parties	4,944	7,306
	<hr/> 13,118	<hr/> 9,356
Fund balances		
Endowment funds	3,203,268	1,852,840
Unrestricted assets	7,788	7,036
	<hr/> 3,211,056	<hr/> 1,859,876
	<hr/> \$3,224,174	<hr/> \$1,869,232



Statement of Revenue and Expenses and Changes in Fund Balances
Year ended June 30, 2008

	Endowment Fund		Operating Fund		City of Salmon Arm Trust Fund		Total	
	2008	2007	2008	2007	2008	2007	2008	2007
Revenue:								
Investment Income (Note 1)	\$ 60,785	\$ 73,090	\$ -	\$ -	\$ 290	\$ 448	\$ 61,075	\$ 73,538
Donations	1,377,196	168,847	16,893	19,642	39,000	45,000	1,433,089	233,489
	<u>1,437,981</u>	<u>241,937</u>	<u>16,893</u>	<u>19,642</u>	<u>39,290</u>	<u>45,448</u>	<u>1,494,164</u>	<u>307,027</u>
Operational Expenses:								
Administration	-	-	16,141	18,823	-	-	16,141	18,823
	<u>-</u>	<u>-</u>	<u>16,141</u>	<u>18,823</u>	<u>-</u>	<u>-</u>	<u>16,141</u>	<u>18,823</u>
Excess of revenue over expenses before grants	1,437,981	241,937	752	819	39,290	45,448	1,478,023	288,204
Grants	87,553	81,505	-	-	41,652	44,796	129,205	126,301
Excess of revenues over expenses (expenses over revenues) for the year	1,350,428	160,432	752	819	(2,362)	652	1,348,818	161,903
Fund balances beginning of year	1,852,840	1,692,408	7,036	6,217	7,306	6,654	1,867,182	1,705,279
Fund Balances end of year	<u>\$3,203,268</u>	<u>\$1,852,840</u>	<u>\$7,788</u>	<u>\$7,036</u>	<u>\$4,944</u>	<u>\$7,306</u>	<u>\$3,216,000</u>	<u>\$1,867,182</u>

An unreviewed summary of the Shuswap Foundation's financial position at June 30, 2008.

Notes:

Investment Income earned during the year:	2008	2007
Interest and Dividends	\$134,770	\$82,019
Realized gains/(losses)	(7,836)	(654)
Unrealized gains/(losses)	<u>(66,149)</u>	<u>(8,275)</u>
Net Earnings	\$60,785	\$73,090

Thank you to our corporate spon

Platinum



sors for your generous support!

Gold



BDO Dunwoody LLP
Chartered Accountants
and Advisors



**WAYNE M.
LETOURNEAU***
NOTARY PUBLIC

* A Professional Notary Corporation

Silver



Mud, Sweat & Tears
STONEWARE AND PORCELAIN POTTERY



Edward Jones®
MAKING SENSE OF INVESTING

Ian D. Johnson
BA, MEd. Counselling Psychology
Canadian Counselling Association Certification



BROOKE JACKSON DOWNS
LAWYERS

Gary M. Brooke* James N. Downs*
Elizabeth Sadorsky Kathryn M. Vennard.
*Law Corporation



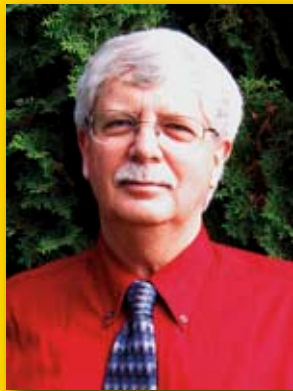
SIVERTZ, KIEHLBAUCH, ZACHERNUK
320-351 Hudson Ave. NE
"Full service law firm since 1912"



To learn more about creating a legacy, please contact:



Cindy Derkaz
President
250-832-8652



Dave Wood
Treasurer
250-832-3549



Margaret Chromka
Secretary
250-832-6371



Lois Higgins
Grants Committee
250-832-4034

To learn more about applying for a grant, please contact: Lois

Shuswap
Community
Foundation

Box 624,
Salmon Arm, BC
V1E 4N7

info@shuswapfoundation.ca
www.shuswapfoundation.ca

