

# 2011/2012 COMMUNITY REPORT



COMMUNITY  
FOUNDATIONS  
OF CANADA



SHUSWAP  
**COMMUNITY**  
FOUNDATION

# OUR MISSION

- Inspire community giving by providing an opportunity for anyone to leave a lasting legacy through permanent endowment fund building.
- Foster donor confidence and community trust through responsible management and investment.
- Honour the memory of families, community members and loved ones.
- Support community causes and charitable organizations.
- Provide responsible granting that will enrich life in the Shuswap.

*Photo: Courtesy of Ann Chidwick*



***Clockwise from Top left:***

Ralph Segreto  
Ineke Hughes  
Bryan Kassa  
Gary Brooke  
Deborah Chapman  
Karen Angove  
Dave Wood  
Rod Bailey  
Melany Dyer  
Doug Adams  
Alice Duck  
Joanne Mason  
(no photo available)



SHUSWAP  
**COMMUNITY**  
FOUNDATION  
**BOARD OF DIRECTORS**



**Shuswap Community Foundation**

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*Cover Photo: Gabriele Klein*

# President's Report

2011/2012 Fiscal Year



This year Shuswap Community Foundation (SCF) is highlighting the 100 year anniversary of Sorrento, one of the many communities that we support in our region. We are very proud to participate in the planned activities throughout the year to celebrate this milestone. The community recently suffered the loss of two of its leaders, Ted Bacigalupo and Maureen Brass, and three members of the Jensen Family in a tragic accident. It is heartening to see the community rally around the surviving family members - giving support where it can. Lisa Rolland, also from this community and a School Board member, passed away at the end of 2011. With enthusiastic support from her family and friends, the Lisa Rolland Literacy Fund was very quickly established to promote literacy throughout the Shuswap. Lisa will be remembered forever as someone dedicated to helping children learn to read. This community spirit – caring about our people – is what SCF is all about.

SCF also reached a significant milestone this past year. Over the past 15 years the Foundation disbursed over \$1,000,000 to charitable organizations in our region. This is a major accomplishment. Other highlights for the year include: the McGuire Lake Memorial Walkway in partnership with the City of Salmon Arm (see p2 for details), seven new family funds, our permanent capital fund that has grown to almost \$5,000,000, a new web site, and, in a difficult economic climate, sustainable, better than average returns on investments.

The Governor General of Canada, The Right Honourable David Johnston, asked the Board of Community Foundations of Canada to

contribute to his mission – his desire to make Canada ‘a smarter and more caring nation.’ The national association embraced this challenge by creating a movement called “Smart and Caring Communities”. It is encouraging member foundations to develop a fund that targets identified areas of need in their communities.

The Board of Shuswap Community Foundation embraced the “Smart and Caring Communities” campaign and decided to do a Vital Signs report for our Shuswap Region. Vital Signs is a checkup conducted by Community Foundations to measure the vitality of communities across Canada. It gathers and publishes data on significant social and economic trends, and assigns grades in areas critical to quality of life. The Vital Signs report promotes an awareness of community issues, identifying community needs and strengths. This report will complement our “Smart and Caring Community” project, and will assist us in our grant-making and leadership activities. We look forward to the results of this study to help better support our communities.

Reflecting on the year shows me there is great promise for the future. I also want to thank retiring Board members Alice Duck and Doug Adams for their significant contributions over the past several years. To those who supported the Foundation this year, I can never thank you enough for your concern for, and generosity towards, the residents of the Shuswap, and for your trust in Shuswap Community Foundation.

Karen Angove

## New Endowment Funds

*Established July 1, 2011 to June 30, 2012*

- SAFE Society
- Kassa Cummings
- Lisa Rolland
- Letham Family
- Seniors Resource Centre
- Brooke Jackson Downs
- Rosemarie's Fund



# McGuire Lake Memorial Walkway

Photo: Gabriele Klein

Each engraved brick laid in the newly designed McGuire Lake Memorial walkway will represent the love, joy, pride and remembrance of someone special.

The walkway, established jointly by the Shuswap Community Foundation and the City of Salmon Arm, will become the designated central community location to celebrate life's milestones, such as significant birthdays and anniversaries, or to fondly remember a loved one. Nestled on the shores of McGuire Lake in downtown Salmon Arm this permanent brick walkway has been created as a place of celebration and remembrance that will honour people who have been significant in our own lives. The serene park setting was seen as an ideal location for the walkway, which would allow family members, friends and the community as a whole a quiet place of reflection and remembrance.

People wishing to establish a permanent memorial marker, whether to honour a 100th birthday, to celebrate

a 50th wedding anniversary or to acknowledge the loss of a loved one, can now personalize a 12" x 24" brick for placement in the walkway. In addition to this tangible marker, families can also rest assured knowing that part of their memorial walkway contribution will continue to serve, and be acknowledged within the Shuswap, through the work of the Shuswap Community Foundation. Each brick purchased for placement includes a donation to the Shuswap Community Foundation's Memorial Walkway fund which will fund community-based charitable programs, projects and services within the Shuswap area in perpetuity. If you are interested in placing a brick in the memorial walkway and being assured your loved one will be remembered through the years, please contact the Shuswap Community Foundation at 250-832-5428 or visit [www.shuswapfoundation.ca](http://www.shuswapfoundation.ca)

# 2012 Discretionary Grants

Grant Recipient	Grant	Fund
222 RCAC S Sponsoring Committee Project: Assemble flight simulators	\$2,000	Salmon Arm Savings and Credit Union Youth Endowment, Youth Endowment, Wainwright-Mobley Endowment and General Fund
Adams River Nature Society * Project: Develop educational salmon apps	\$4,000	Geoff and Judith Benson Family Endowment and General Fund
Billy Miner Society (Caravan Farm Theatre) Project: Professional theatre lighting system	\$3,000	Higgins Family Endowment, Gordon and Bev Marshall Family Endowment and General Fund
Cedar Heights Community Association Project: Hall modernization and expansion	\$5,000	Doug and Donna Adams Family Endowment, Lloyd and Dorothy Askew Family Endowment and General Fund
Eagle Valley Community Support Society Project: Kitchen and food bank appliance upgrade	\$2,800	John and Ingrid Monk Endowment, Rod Bailey Endowment and General Fund
Friends of 1922 Notch Hill Society Project: Notch Hill Church restoration	\$3,500	Lloyd and Dorothy Askew Family Endowment and General Fund
Kamloops Symphony Society Project: "Salmon Arm Concert Series"	\$750	Enid Finn Memorial Endowment and General Fund
Literacy Alliance of the Shuswap Project: Book purchase for adult book club	\$1,000	Ev Painter Endowment and General Fund
Literacy Alliance of the Shuswap Project: Book purchase promoting children's literacy	\$750	Wainwright-Mobley Endowment
Malakwa Community Association Project: Storage shed	\$3,000	Derkaz/Derby Family Endowment and General Fund
North Canoe Parent Advisory Council* Project: Playground upgrade	\$2,300	Salmon Arm Schools Legacy Endowment and Wainwright - Mobley Endowment
Northern Lights Chamber Choir** Project: Purchase sheet music and filing cabinet	\$1,025	Gertrude and Ludwig Klein Memorial Endowment
Salmon Arm & Shuswap Lake Agricultural Association Project: Renovate old arena change rooms	\$3,500	Browne Johnson Legacy, Paul and Elvi Pukas Family Endowment and General Fund
Salmon Arm Bay Nature Enhancement Society Project: New flooring and exclusion buoys	\$3,000	Margo Hewitt, Dr. Melany Dyer Endowment, Potter/Edgell Family Endowment, Robin Jackson Environment Fund, Salmon Arm Savings and Credit Union Community Endowment and General Fund
Salmon Arm Children's Festival Society Project: Roaring Rainforest commercial grade bouncer	\$2,000	Wainwright-Mobley Endowment
Salmon Arm Museum and Heritage Association Project: Garage Exhibit	\$3,000	Lloyd and Dorothy Askew Family Endowment
Shuswap Association for Community Living Project: Website redesign	\$2,500	Mary Douhaniuk Memorial, Turner Orchards Endowment and General Fund
Shuswap Association of Writers ** Project: Word on the Lake 2013 Writers' Festival	\$3,000	Geoff and Judith Benson Family Endowment
Shuswap Community Foundation Project: Serendipity Grants at President's discretion	\$1,400	General Fund
Shuswap District Arts Council Project: Refinish hardwood floors	\$3,000	John and Ingrid Monk Endowment and General Fund
Shuswap Family Resource Centre Project: "Kids Reaching Our Community"	\$2,500	Gordon and Bev Marshall Family Endowment, Jennifer Phillips Memorial, Pat and Peter Cummings/Patti and Bryan Kassa Endowment
Shuswap Hut and Trail Alliance Society Project: 2013 Shuswap trail program development	\$3,000	Salmon Arm Savings and Credit Union Community Endowment, Shuswap Coordinating Training Society Endowment and General Fund
Sicamous and District Senior Centre Society Project: Continuous flow hot water system	\$3,500	Anonymous Eagle Valley Seniors Endowment, C. Norman Barber Endowment, Seniors Project Endowment and General Fund
Sorrento Memorial Hall Association Project: Sorrento Centennial Celebration Children's Activities	\$3,000	Sorrento Lions Club - Catherine Dilworth Memorial Endowment and General Fund
Switzmalph Cultural Society*** Project: Equipment storage unit and weed eater	\$2,500	Earl and Muriel MacKenzie Family Endowment, Gerry and Rita Chu Family Endowment, Tom and Elsie Brighthouse Family Endowment and General Fund
<b>Total Discretionary Grants</b>	<b>\$65,025</b>	

SPONSORED BY: \* North Okanagan Shuswap School District # 83  
 \*\* Shuswap District Arts Council  
 \*\*\* Salmon Arm Museum and Heritage Association



# SHUSWAP COMMUNITY FOUNDATION



Photo: Taylor Behan (left) Bob Morris (right)

## 2012 Donor Directed Grants

Fund	Grant	Recipient/Purpose
Al Neale Bursary Fund	\$3,000	Salmon Arm College Scholarship Trust Fund for awards to Ryan Rithalear, Erica Baker, Tim Turner
Bill MacDonald Memorial Fund	\$418	Earnings to local chapter Canadian Cancer Society
Brad Jackson Memorial Scholarship	\$500	School District #83 award to Heather Savage
Centennial Reunion Scholarship Fund	\$200	School District # 83 award to Selena Magel
David John Stratton Memorial Bursary Fund	\$400	School District # 83 award to Dani Valgardson
Elisabeth Thomi Endowment Fund	\$38,789	Earnings to Shuswap Branch BCSPCA
Eve and Christopher Wright Scholarship Fund	\$500	Salmon Arm College Scholarship Trust Fund award to Paul Wunderlich
Fowler/Gomme Family Endowment Fund	\$250	Award to Janae Van Gameren at Shuswap Music Festival 2012
Frank and Rita Smuin Memorial Bursary Fund	\$650	School District # 83 award to Mary Ross
Henderson Award in International Development	\$1,000	Award to Ozgul Akinci, Doctoral Studies, UBC Okanagan
Jack and Edith Stead Endowment Fund	\$807	Earnings to Salmon Arm Museum and Heritage Association
Janet Pattinson - Shuswap Naturalist Club Bursary	\$679	To fund the Shuswap Naturalists Bursary
Lisa Rolland Children's Literacy Fund	\$186	Earnings to School District # 83
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	\$925	Earnings to Shuswap Hospital Foundation
Morris Bursary Fund for Excellence in Mathematics	\$700	School District # 83 award to Taylor Bahen
Nayki/Greer Family Endowment Fund	\$800	School District # 83 award to Aleksina Teto
Nayki/Greer Family Endowment Fund	\$800	Earnings to Shuswap Branch BCSPCA
Nick and Marilyn Brown Family Fund	\$500	Salmon Arm College Trust Fund award to Nicole Sjolie
Ready Family Endowment Fund	\$422	Earnings to Shuswap Area Family Emergency Society
Ready Family Endowment Fund	\$421	Earnings to Shuswap Hospice Society
Salmon Arm Kinsmen and Kinette Scholarship Fund	\$1,400	School District # 83 award to Janae Murphy Pulsifer
Salmon Arm Secondary Athletic Endowment Fund	\$900	Earnings to SD #83 for Salmon Arm Secondary Athletic program
Shuswap Branch BCSPCA Endowment Fund	\$1,844	Earnings to Shuswap Branch BCSPCA
Shuswap Volunteer Firemen's Association - Cody Davies Memorial Bursary	\$500	School District # 83 award to Jarrod Rampone
Steve Heal Memorial Scholarship Fund	\$450	School District # 83 award to Haley McDonnell
Tom Brush Memorial Scholarship Fund	\$500	School District # 83 award to Lucas Hodges
Tomas Idzan Memorial Bursary Fund	\$500	Salmon Arm College Scholarship Trust Fund award to Caitlyn Chartrand
Walter Ellaschuk Memorial Bursary Fund	\$1,000	School District # 83 awards to Natalie Kremer and Cole Williamson
Wayne Williamson Memorial Fund	\$154	Earnings to Shuswap Volunteer Search and Rescue Society
Douglas Burkitt Memorial Fund	\$229	Earnings to Shuswap Hospital Foundation
<b>Total Donor Directed Grants</b>	<b>\$60,424</b>	

## A Passion for Nature



Muriel Axe moved to Salmon Arm in 1996 at the age of 84 to be near her sister and brother-in-law Margaret and Dennis Potter, her niece Carol Edgell and her family, and closer to her nephew Frank Potter and his family in Calgary. Carol relates that Muriel was like a second mother to her and Frank—they were very close.

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For twelve wonderful years Muriel enjoyed daily walks along the foreshore, the wharf and around McGuire Lake. She lived close to the water's edge so was next to what she loved—the water, birds, ducks and turtles that she knew by name. She cherished the wonder and peace of nature.

A hallmark of Muriel's life was her keen interest in what was going on in the natural world around her and in her adopted city. She enjoyed each day and lived it to the fullest.

One of the secrets of her long and fulfilling life was her attitude that the glass was always half full. Carol remembers Muriel as one of the most positive people around. She also recounts that 'she never had an unkind word about anyone and was a kind and lovely human being with a beautiful smile.'

Muriel transmitted her love of nature and her curious, gentle manner to her family, thus leaving a wonderful legacy

to those she loved. When she passed away in September 2008, at age 96, Carol and Frank wanted to honour their beloved aunt, so they set up the 'Potter Edgell Endowment Fund' in memory of Muriel Axe.

In keeping with Muriel's love for nature, this fund's priority is to enhance the natural environment. If volunteers want to do things to preserve and support nature, then this fund will help them to preserve for future generations what Muriel loved and enjoyed—the natural world.

## Lisa Rolland Children's Literacy Fund



Widely known and much loved, Lisa was born in Duncan, BC. Raised in Fernie and Salmon Arm, she was a graduate of Salmon

Arm Senior Secondary. She met her husband at a Slo-Pitch Tournament in Vernon in 1989. They settled in Sorrento in 2001, and Lisa quickly became a staunch member of the community, helping out whenever and wherever she could with no muss, no fuss. For six years she sat on the Board of School

Trustees, representing the Sorrento/Carlin area of School District #83. Her constant focus was, "Is it good for the kids?"

Shuswap Children's Literacy Fund was created in June of 2011, and Lisa and Bobbi Johnson, also a school trustee, planned to hold a 'shave your head for literacy' fundraiser to help the fund reach the goal of \$10,000. Sadly, Lisa's illness took her away before the fundraiser could be held, but not before she learned of the change to the fund's name – The Lisa Rolland Children's Literacy Fund. Daryl Dyck,

Lisa's husband and biggest booster, was instrumental in making the change happen. She was able to express her excitement, and enormous gratitude, to the Foundation for making this her legacy to the children of the Shuswap.

It is a great tribute to Lisa that within three months of her death, contributions to the fund surpassed the \$10,000 mark, enabling the first grant from the interest earned by the fund to be made this year, at the Annual Community Meeting of the Shuswap Community Foundation on October 3, 2012.

## 2012 Agency Grants

Fund	Grant	
Anglican Parish of Salmon Arm - Sicamous Endowment Fund	\$510	Earnings to fund holder
City of Salmon Arm Endowment Fund	\$3,884	Earnings reinvested in fund
Fletcher Park Seniors Resource Centre	\$46	Earnings reinvested in fund
North Okanagan - Shuswap School District Endowment Fund	\$2,274	Earnings to School District # 83 for scholarships and bursaries
Okanagan College Foundation Fund	\$4,094	Earnings to fund holder
Salmon Arm College Scholarship Trust Fund - George and Nancy Clark Memorial Bursary	\$3,000	Kyla Oshaneck and Dixon Kantymir
Salmon Arm College Scholarship Trust Fund - Len O'Neill Memorial Award	\$3,000	Jeanette Sanderson, Rebecca Marchand, Hayden Melin, William Macfie, Riley Jackson
Salmon Arm College Scholarship Trust Fund - Vicki Hitchen Memorial Award	\$2,400	Lori Thomas and Dalton Stark
Salmon Arm Museum and Heritage Association Endowment Fund	\$4,712	Earnings to fund holder
Salmon Arm Museum and Heritage Association Endowment Fund-Peterson Family Fund	\$1,930	Earnings to Salmon Arm Museum and Heritage Association
Shuswap Area Family Emergency Society Endowment Fund	\$251	Earnings to fund holder
Shuswap Art Gallery Association Endowment Fund	\$11,667	Earnings to fund holder
Shuswap Branch BCSPCA Endowment Fund	\$1,844	Earnings to fund holder
Shuswap Community Foundation Administration Fund	\$2,370	Earnings to support administration of Foundation
Shuswap District Arts Council Endowment Fund - Blair Borden Memorial Award	\$1,000	Andrew Storey and Joseph Dansereau
Shuswap District Arts Council Endowment Fund	\$1,452	Earnings to fund holder
Shuswap District Arts Council Endowment Fund - Thompson Okanagan Network Arts Council	\$215	Earnings to fund holder for regional meeting
Shuswap Hospice Society Fund	\$1,239	Earnings to fund holder
Shuswap Hospital Foundation Endowment Fund	\$285	Earnings to fund holder
Shuswap Hut and Trail Alliance Society Endowment Fund	\$98	Earnings reinvested in fund
<b>Total agency grants</b>	<b>\$46,271</b>	

## 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	Maude 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	

# Frank Barnard

A self-taught, self-made man, Frank Barnard was born in Chase, BC, his father having taken his mother to the nearest doctor by boat from Blind Bay.

A self-taught, self-made man, Frank Barnard was born in Chase, BC, his father having taken his mother to the nearest doctor by boat from Blind Bay.

In 1950, Frank met and married Muriel Dobson, who kept the family home and quietly encouraged and supported Frank in his business. She passed away in 2002.

A chance remark made by his friend, Don Ruth, led him to make the decision to go into the seed-harvesting business. For thirty years Western Tree Seeds Limited harvested all species of tree seeds, from Sitka Spruce on the Queen Charlotte Islands to Lodgepole

pine from as far north as it grows, and sold it all over the world. Western Tree Seeds Limited became widely known as the best seed plant in North America. One of the reasons for this was that Frank always instructed his seed cone suppliers to leave half the cache his unpaid workers had gathered – the squirrels! “Squirrels never cache a cone not ready for picking” says Frank.

Frank attributes his success to “a combination of blind luck, opportunity, and a willingness to play the hand I was dealt.” He also gives full credit to all the people who worked for him over the years. Without their dedication and willingness to go the extra mile,



the business wouldn't have succeeded. He is proud to be a Shuswap Community Foundation Founder.

Today Frank still lives on a portion of the original family fruit farm in Blind Bay. Occasionally he goes to Sorrento Nurseries, co-owned by his son, Dave Barnard, for free coffee in exchange for free advice.

## Mary Thomas Cultural Centre and Heritage Sanctuary

At the 2011 Annual Community Meeting of the Shuswap Community Foundation, Bonnie Thomas spoke about community. She was accepting funding for a ride-on mower for the Mary Thomas Cultural Centre and Heritage Sanctuary. The grant to the Heritage Sanctuary was a first. Shuswap Community Foundation had never received an application nor given money to any Secwepemc group.

With grace and ease, Bonnie talked about her mother, the much respected late Dr. Mary Thomas. “Wealth,” her mother used to say, “is measured by how much is given away.”

With that simple sentence, Bonnie connected the community of grant recipients, donors, and guests. The award was part of a chain of events that started with one question from Deborah Chapman, Curator of the Salmon Arm Museum, when she was visiting Bonnie at the Sanctuary. Knowing the Grant Selection Committee members at the Foundation are always on the lookout for community groups that do good work, she asked Bonnie what the



Heritage Sanctuary needed most.

Deborah took that answer to the Salmon Arm Museum's Board of Directors, and it agreed to sponsor the project.

Before leaving the podium, Bonnie did an amazing thing. In the true spirit of community, she had brought a gift. It was a beaded eagle feather, a treasured gift, wrapped in a beautiful scarf. You could have heard a pin drop when she gave the feather to the donor responsible for the grant, Bill Douhaniuk. It was a gift for the giver, drawing a new circle in our community.

Thank you Bonnie!

# Harry and Lois Higgins Community Builders

Harry and Lois Higgins met in Manila, Philippines, where Harry, an Australian, was working with Shell Oil and Lois, an American, was visiting her parents. Together they decided to make Canada their home, living first in Ocean Falls, then in Enderby for two years before moving to Salmon Arm. Here they grew deep roots and participated in community building as leaders and participants.



Harry worked as a school administrator, including sixteen years as principal of J.L. Jackson Sr. Secondary School. Involved with the Shuswap Teachers' Association and the provincial BC Teachers Federation, he was also a founding member of the counseling committee of the Drug and Alcohol Association and the Community Alternatives Measures Program (CAM) which was organized by the Attorney General's office to divert young offenders from the courts through mediation and counseling. As a keen naturalist Harry participated with the University of Victoria in a rattlesnake study to mark over 1500 snakes in the Vernon area.

Lois was a founding member of the Shuswap Naturalist Club, the Shuswap District Arts Council, Shuswap Theatre, and the Shuswap Daycare Centre. She was also a Board member with the Shuswap Independent Living Association, the Caravan Stage Company, Okanagan College Advisory Council and the Salmon Arm committee for the Okanagan Symphony. She was also a member of the Shuswap Singers and the writing group Octava for many years.

After two years of careful planning, Lois and a small group of like-minded individuals put in place the requirements for the Shuswap Community Foundation. Lois served on the first Board of Directors, formed on January 10, 1994, remaining a member and Chair of the Grants Committee until her retirement in 2011. She continues to serve as advisor to the Grants Committee.

When not involved in building and promoting community groups Harry and Lois enjoyed the great outdoors as cross-country skiers, hikers and canoeists. Lois' work in the travel industry provided ideas and opened doors to journeys to all parts of the world, including an entire sabbatical year in the South Pacific and Asia.

In 2009, Harry and Lois set up the Higgins Family Endowment fund as a totally discretionary fund because they understand the importance of discretionary funds that allow the Foundation Board to meet the changing needs of the community. The Higgins Family Endowment Fund is a lasting legacy to two ardent community builders and the quality-of-life organizations they helped to create.

## Shuswap Lake South Shore Historical Committee



*Photo: Courtesy of Ann Chidwick*

The committee's goal was to record the settlement history of the south shore of the Shuswap "arm" of Shuswap Lake, from Little River to Reedman's Point, and list as many historic homesteads as possible via stories and pictures of the early settlers. Settlement of the area began in 1893.

Their goal was realized in the summer of 2012 with the publication of *Voices of the People*.

A grant from the Shuswap Community Foundation's General Fund helped defray expenses incurred during the research phase of the project. The committee will submit the material collected during the project to the Haney Museum and Heritage Association for its archives.

## In Memoriam

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

## Soup & Stories

A grant from the Ev Painter Endowment Fund was used to facilitate a "Soup & Stories" program for families in the Shuswap area, to promote family literacy. Creative, fun and motivating, parents participated in a non-threatening learning environment, building confidence in their ability to share oral stories and read storybooks with their kids ages 0 - 12. In May 2012, the Literary Alliance of the Shuswap Society held three sessions, offering

free lunch, free childminding, and giving away free books. Fifty-one adults and 84 children attended from a wide range of socio-economic backgrounds.

The Literary Alliance of the Shuswap Society (LASS) appreciates the Foundation's funding, and greatly appreciates its commitment to supporting literacy in our community.



# Geoff & Judith Benson Family

## Endowment Fund

After exploring BC by camper, Geoff & Judith Benson were attracted to the Shuswap as a retirement possibility. The choice was a wise one. After living in Salmon Arm for three years, they have found people who shared their interests: birding, hiking, skiing, environmental activities and the arts.

Born and raised in Joliet, Illinois, Judith graduated from Michigan State University with a degree in Elementary Education, majoring in Early Childhood Education. Geoff was born and raised in Cumbria, UK and studied at Cambridge before obtaining a PhD in Nuclear Physics at the University of Manchester. They met and were married in Manchester, then immigrated to Canada, arriving in Kingston, ON with their two children in 1974, where Geoff took up a position in the Physics Department at Queens University. Their daughter Shelley teaches Communication at Oakland Community College, and son Aaron practices law, both in Michigan.

While at Queens, Geoff made a career change. He acquired an MBA, and relocated to work for Federated Co-operatives Limited in Saskatoon, SK. In 1980 he joined the Potash Corporation of Saskatchewan, where he worked until his retirement in 2008. Once settled in Saskatoon, Judith earned a diploma in the Education of Exceptional Children, after which she taught Kindergarten – Grade 8 for twenty-five years. Since 1995, she has been writing and publishing books for children and youth.

During their thirty years in Saskatoon, both were actively involved in the community. They were co-founders of

SOS – Save Our Elms, an organization dedicated to educating the public on how to protect Saskatoon's beautiful American Elms from the threat of Dutch Elm Disease. Both Geoff and Judith sang in the University of Saskatchewan Chorus.

Here in the Shuswap, Judith and Geoff have become members of the Shuswap Singers, Shuswap Men's Chorus, SABNES, Shuswap Naturalist Society, a book group, Shuswap Association of Writers, and the Shuswap Writers' Group. Geoff has taken up the cello, which he plays with the Shuswap String Orchestra.

When Geoff retired, he left the company with stock options which had to be exercised within three years. He and Judith familiarized themselves with the philosophy of Shuswap Community Foundation, and chose to donate the proceeds from some of the options to the Foundation. Earnings from their fund will be disbursed at the Board of Directors' discretion, under Judith and Geoff's guidelines regarding geographic locations and/or fields of interest.

The first grants drawn from the earnings of the fund will be awarded at the Annual Community Meeting of the Foundation in October of 2012.

# 2011/2012 Foundation Donors

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 Shuswap Association of Writers  
 Shuswap District Arts Council  
 Sorrento School  
 Sorrento Tree Toppers Ltd.  
 Spooner Electric Ltd.  
 St. Mary's Church  
 Surecrop Feeds Inc.  
 TD Bank Financial Group

# Permanent Capital Fund

## Discretionary Funds

### BOARD DISCRETION

#### (No limitation to Board granting authority)

	2012	2011
Doug and Donna Adams Family Endowment	14,647	10,498
Tom and Elsie Brighthouse Family Endowment	16,891	15,291
Brooke, Jackson, Downs Endowment	7,482	0
Chapman Family Endowment	3,282	2,087
Derkaz/Derby Family Endowment	30,391	29,028
General	421,764	389,848
Higgins Family Endowment	16,390	12,586
Earl and Muriel MacKenzie Family Endowment	12,295	10,981
Gordon and Bev Marshall Family Endowment	13,508	12,775
Marian and Ralph Segreto Endowment	8,462	6,784

### BOARD DISCRETION - Donor Preference

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

	2012	2011
Lloyd and Dorothy Askew Family Endowment	184,707	176,258
Molly Bell Endowment	5,605	1,519
Browne Johnson Legacy	60,657	59,348
Gerry and Rita Chu Family Endowment	12,188	10,242
Pat and Peter Cummings/Patti and Bryan Kassa Endowment	10,782	0
Enid Finn Memorial	11,151	10,002
Margot Hewitt, Dr. Melany Dyer Endowment	15,481	12,506
Gertrude and Ludwig Klein Memorial	47,228	40,195
Shuswap Coordinating Training Society Endowment	43,576	41,778
Turner Orchards Endowment	15,036	13,905
Rosemarie's Fund	4,691	0
Youth Endowment	13,761	13,375

### BOARD DISCRETION - Donor Limitations

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

	2012	2011
Anonymous Eagle Valley Seniors Endowment	11,250	0
Rod Bailey Endowment	10,964	10,058
C. Norman Barber Endowment	51,319	49,409
Geoff and Judith Benson Family Endowment	176,535	161,127
Mary Douhaniuk Memorial	50,997	48,726
Eagle Valley Communities Endowment	5,432	4,350
Robin Jackson Environmental Endowment	15,467	10,346
Letham Family Endowment	6,942	0
John and Ingrid Monk Endowment	84,467	80,775
Ev Painter Endowment	18,166	16,420
Jennifer Phillips Memorial	55,929	52,680
Potter/Edgell Family Endowment	23,499	21,300
Paul and Elvi Pukas Family Endowment	33,086	31,620
Salmon Arm Savings and Credit Union Community Endowment	57,663	44,275
Salmon Arm Savings and Credit Union Youth Endowment	15,111	14,606
Salmon Arm Schools Legacy	16,955	16,204
Seniors Project	23,624	22,816
Sorrento Lions Club - Catherine Dilworth Memorial Endowment	83,418	79,857
Wainwright-Mobley Memorial	141,077	134,935



## Dedicated Funds

<b>DONOR DIRECTED</b>	<b>2012</b>	<b>2011</b>
Nick and Marilyn Brown Family	13,660	10,861
Tom Brush Memorial Scholarship	12,878	12,353
Douglas Burkitt Memorial	5,552	7,112
Centennial Reunion Scholarship	5,976	5,714
Mary Douhaniuk Memorial	27,193	26,231
Walter Ellaschuk Memorial Bursary	28,058	26,905
Fowler/Gomme Family Endowment	19,507	17,930
Steve Heal Memorial Scholarship	12,877	12,142
Henderson Award in International Development	32,256	21,162
Tomas Idzan Memorial Bursary	11,570	11,068
Brad Jackson Scholarship	14,269	12,152
Salmon Arm Kinsmen and Kinette Scholarship	38,599	37,506
Bill MacDonald Memorial	10,517	10,596
Marie Manson Memorial Art Award	29,276	27,943
Morris Bursary for Excellence in Mathematics	21,154	16,036
Nayki/Greer Family Endowment	47,408	35,620
Al Neale Bursary	101,247	88,965
Janet Pattinson - Shuswap Naturalist Club Bursary	19,005	18,150
Ready Family Endowment	24,199	20,564
Salmon Arm Secondary Athletic Endowment	24,243	21,821
Lisa Rolland Children's Literacy Fund	10,915	560
Shuswap Volunteer Firemen's Association – Cody Davies Memorial Bursary	13,157	13,033
Frank and Rita Smuin Memorial Bursary	18,231	17,579
David John Stratton Memorial Bursary	11,306	10,808
Jack and Edith Stead Endowment	21,727	20,447
Elisabeth Thomi Endowment	1,088,224	1,041,216
Wayne Williamson Memorial	4,200	3,994
Eve and Christopher Wright Scholarship	12,305	11,802
<b>AGENCY (Funds held on behalf of donor)</b>	<b>2012</b>	<b>2011</b>
Administration Endowment	63,628	61,234
Anglican Parish of Salmon Arm - Sicamous Endowment	14,315	13,680
City of Salmon Arm Endowment	116,344	98,590
Fletcher Park Seniors Resource Centre	2,149	0
Hospital Legacy	10,283	9,873
North Okanagan-Shuswap School District Endowment	61,137	58,634
Okanagan College	114,061	109,860
Safe Society Endowment	10,789	0
Salmon Arm College Scholarship Trust - George and Nancy Clarke	86,982	83,529
Salmon Arm College Scholarship Trust - Vicki Hitchen Memorial	65,093	63,142
Salmon Arm College Scholarship Trust - Len O'Neill Memorial	75,997	72,569
Salmon Arm Museum and Heritage Association Endowment	132,173	126,466
Salmon Arm Museum and Heritage Association - Peterson Family	54,115	51,811
Shuswap Art Gallery Association Endowment	328,692	311,783
Shuswap Branch, B.C.S.P.C.A. Endowment	58,188	45,963
Shuswap District Arts Council Endowment	40,836	38,458
Shuswap District Arts Council Endowment - Blair Borden Memorial	27,992	26,815
Shuswap District Arts Council Endowment -T.O.N.A.C.	6,010	5,771
Shuswap Hospice Society Endowment	35,009	33,546
Shuswap Hut and Trail Alliance Society Endowment	2,919	2,123
Total Discretionary Funds	1,851,875	1,668,511
Total Dedicated Funds	2,986,217	2,774,114
<b>Total Funds</b>	<b>4,838,092</b>	<b>4,442,625</b>

*fund values include contributed capital and retained earnings.*

# 2012 Financial Report

## Statement of Financial Position

June 30, 2011 with comparative figures for 2010.

### ASSETS

Current assets	2012	2011
Cash & cash equivalents	99,979	423,852
Accounts receivable	2,663	34,800
Prepaid expenses	750	675
	<b>103,392</b>	<b>459,327</b>
Investments at market	4,844,752	4,104,540
	<b>\$4,948,144</b>	<b>\$4,563,867</b>

### LIABILITIES AND FUND BALANCES

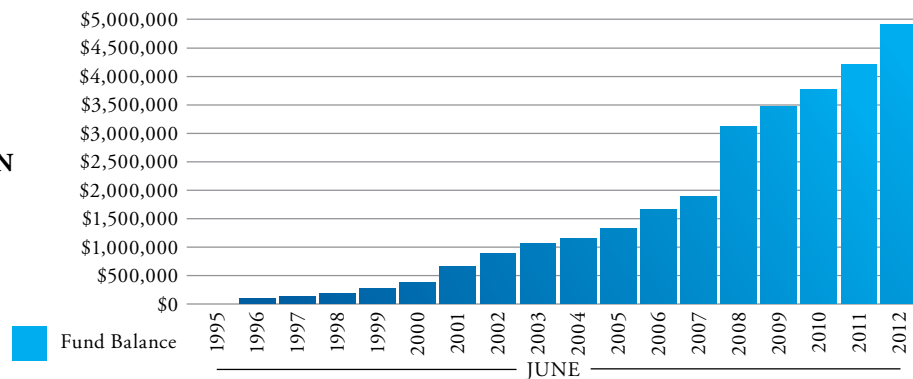
Current Liabilities	2012	2011
Grants and accounts payable	13,231	4,090
Deferred Revenue (Admin)	12,400	18,500
Funds held for third parties	2,361	3,971
	<b>27,992</b>	<b>26,561</b>
Fund balances		
Endowment funds	4,884,921	4,499,831
Unrestricted assets	35,231	37,475
	<b>4,920,152</b>	<b>4,537,306</b>
	<b>4,948,144</b>	<b>4,563,867</b>

An unreviewed summary of the Shuswap Foundation's financial position at June 30, 2012.

### Investments consist of the following:

	2012	2011
Guaranteed Investment Certificates & money market	0	686,547
Bonds	0	1,739,667
Equities - preferred shares	0	751,580
Equities - common shares and trust units	0	870,163
Mawer Balanced Fund Class O	4,797,923	0
Life Insurance Policy	46,829	56,583
<b>Total Investments</b>	<b>4,844,752</b>	<b>4,104,540</b>

### CAPITAL FUND GROWTH BETWEEN 1995 AND 2012





## 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	
	2012	2011	2012	2011	2012	2011	2012	2011
<b>Revenue:</b>								
Investment Income (note 1)	437,839	378,774	0	0	136	214	437,975	378,988
Admin Fee - Capital	0	0	42,700	39,443	0	0	42,700	39,443
Admin Fee - Other	-	-	5,314	5,133	-	-	5,314	5,133
Donations	168,638	370,159	19,500	22,000	50,000	50,000	238,138	442,159
	<b>606,477</b>	<b>748,933</b>	<b>67,514</b>	<b>66,576</b>	<b>50,136</b>	<b>50,214</b>	<b>724,127</b>	<b>865,723</b>
<b>Operational Expenses:</b>								
Administration cost	-	0	69,758	50,531	0	0	69,758	50,531
Administration Fee	42,700	39,443	0	0	0	0	42,700	39,443
Discretionary Manager Fee	19,973	0	0	0	0	0	19,973	
	<b>62,673</b>	<b>39,443</b>	<b>69,758</b>	<b>50,531</b>	<b>0</b>	<b>0</b>	<b>132,431</b>	<b>89,974</b>
Excess of revenue over expenses before grants	543,804	709,490	(2,244)	16,045	50,136	50,214	591,696	775,749
Life Insurance costs	2,600	2,600	0	0	0	0	2,600	2,600
Grants	156,114	140,582	0	0	51,746	54,513	207,860	195,095
	<b>158,714</b>	<b>143,182</b>	<b>0</b>	<b>0</b>	<b>51,746</b>	<b>54,513</b>	<b>210,460</b>	<b>197,695</b>
Excess of revenues over expenses (expenses over revenues) for the year	385,090	566,308	(2,244)	16,045	(1,610)	(4,298)	381,236	578,054
Fund balances start of year	4,499,831	3,933,523	37,474	21,429	3,971	8,269	4,541,276	3,963,221
<b>Fund Balances end of year</b>	<b>\$4,884,921</b>	<b>\$4,499,831</b>	<b>\$35,230</b>	<b>\$37,474</b>	<b>\$2,361</b>	<b>\$3,971</b>	<b>\$4,922,512</b>	<b>\$4,541,275</b>

## Notes to Financial Statements

<b>Investment Income earned during the year:</b>	<b>2012</b>	<b>2011</b>
Interest and Dividends	214,113	207,818
Realized gains/(losses)	219,720	10,173
Unrealized gains/(losses)	13,760	155,697
Life Insurance	(9,754)	5,086
	<b>437,839</b>	<b>378,774</b>
Investment income City of Salmon Arm Trust		
Interest	136	214

An unreviewed summary of the Shuswap Foundation's financial position at June 30, 2012

To view full Financial Statements please go to [www.shuswapfoundation.ca](http://www.shuswapfoundation.ca)

## Bob Morris & Taylor Behan

Robert “Bob” Morris established the “Morris Bursary Fund for Excellence in Mathematics” in 2008. Income from the fund provides a bursary to a female student graduating from Salmon Arm Senior Secondary School who has demonstrated excellence in mathematics, and who intends to pursue post secondary studies in mathematics or a related field. “Some of the best jobs in North America require mathematics” says Bob.

This year, Taylor Behan was the recipient of the bursary. Taylor is now enrolled in the Science One Program at UBC Vancouver. She is very grateful for the support of her community and especially grateful for Bob’s generosity in providing the bursary specifically for female students.



## Shuswap Trail Map and Guide Project



A Foundation grant through the Browne Johnson Legacy Fund provided the impetus for the Shuswap Hut & Trail Alliance to form a partnership with Shuswap Tourism and others in order to review and update the regional Shuswap Trail Guide, reprinted in June, 2012. Newly built and mapped regional snowshoe trails are included in the updated guide.

The Alliance was also able to upgrade its mapping software, purchase a new GPS unit, and work with its website provider to redesign and integrate online mapping with their online trail guide. Still in progress is the Nordic Ski and Snowshoe Trails map, to be printed early this winter (2012).

In partnership with the Provincial Mountain Bike Tourism Association, an online trail guide for destination mountain bike trails is being developed. The Shuswap section will include trail guide information and corresponding maps for all mountain bike trails throughout the region.

Sam Frese, a second year engineering student at UBC, was hired via a Federal Canada Summer Jobs program grant, and he has uploaded all the new trail guide content, plus online maps, plus the mountain bike trails information, to the newly redesigned online trails website at [www.shuswaptrails.com](http://www.shuswaptrails.com).

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### GUIDING PRINCIPLES

In pursuit of its mission, the 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.

For more information visit [shuswapfoundation.ca](http://shuswapfoundation.ca)



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