



**SHUSWAP  
COMMUNITY  
FOUNDATION**

**2015/2016  
COMMUNITY REPORT**

# Meet Our Directors

## Did You Know?



**Dave Wood, President -**

*enjoys spending time with his family and travelling the world.*



**Ineke Hughes, Media Director -**

*was once the lead bartender at the Shuswap Inn (now the Shuswap Lodge Retirement Residence)*



**Bryan Kassa, Vice President -**

*is also a member of the Salmon Arm Museum and Heritage Association, has been involved with other community organizations. Bryan also loves cycling.*



**Kathryn Vennard, Director -**

*given time and opportunity for a game, I could be called a pool shark.*



**John White, Treasurer -**

*is a partner at BDO Canada LLP and originally from Alberta.*



**Melany Dyer, North and South Shuswap Area Representative -**

*lives on Shuswap Lake with her 3 horses, 2 dogs, and 2 donkeys!*



**Sharon Gavel, Secretary -**

*likes to travel and is learning to speak Spanish.*



**Ralph Segreto, Investment Director-**

*enjoys both watching and playing soccer. I especially like seeing Canadians do well.*



**Deborah Chapman, Grants Director-**

*has two granddaughters who live with their parents in Japan whom they wish to see more often!*



**Rod Bailey, Sicamous and Area Representative -**

*as a trekker, Rod has been on top of one of the Seven Summits, Mt Kilimanjaro in Tanzania, Africa, in addition to the Himalayas and the Andes.*



**Gary Brooke, Founding Member of SCF**

*even though he describes his musical skills as 'modest', Gary enjoys playing piano, and singing with the Shuswap Men's Chorus.*



**SCF Staff -**

**Paulette Brown, Office Administrator**  
**Emily Schultz, Administrative Assistant**

# President's Message

2016 has been an interesting year for Shuswap Foundation. In previous years, we have seen remarkable growth in our funds as a result of strong markets. This fiscal year we did achieve a 5.19% return, despite the few months of negative downturns in the market. At the time of writing, our investment portfolio is valued at \$8,008,968, up from \$7,635,488 in June of 2015, a gain of \$373,480. As of May 31, we have 141 funds in our capital fund and an estimated \$370,000 in grants will be paid out this year.

This year, the Board took advantage of two bequests the Foundation received to create a leveraging program to increase the number of discretionary funds, providing our grants committee with more flexible granting opportunities. Our Community Building-Matching Funds program has generated eight new funds and matched a total of \$45,588.

SCF assumed the administration of the District of Sicamous Grants-in-Aid program during the year and completed the first adjudication of grant requests in late 2015.

2017 will mark Canada's Sesquicentennial. SCF is participating in the Community Fund for Canada's 150<sup>th</sup>; in collaboration with Community Foundations of Canada, and support from the Government of Canada and national philanthropic leaders. The purpose of the grant is to encourage participation in community initiatives, activities and events, and we encourage small community groups planning events for 150<sup>th</sup> to call our office to inquire about this grant opportunity.

As the Foundation takes on new initiatives to increase our community awareness and provide support to the Shuswap communities we serve, the office has seen an increase in public contacts through visitors and our website. A new challenge for Paulette and Tara was to bring our website up to date to provide our clients with current information and a more efficient way to apply for grants. The new website is a work of art and makes navigating around our website very easy! Please take the time to have a look at it! Special thanks to our web designer, Erica Lahoda.

We are pleased to welcome Kathryn Vennard as director to our board in this past year; she is already making a valuable contribution to the Foundation.

Due to the heavy demands on her time, Director Lana Fitt resigned from the Board, but still offers her help if needed. We are in search of a replacement and hope to have the position filled soon.

Information about participating in any of our programs and initiatives can be found at [www.shuswffoundation.ca](http://www.shuswffoundation.ca) or call the office. You are also welcome to stop by the office for a visit.

Information about participating in any of our programs and initiatives can be found on our website [www.shuswffoundation.ca](http://www.shuswffoundation.ca) or call the office. You are also welcome to stop by the office for a visit.



Dave Wood  
President

# Kyllo Family Endowment

## *Private Business, Public Service and Philanthropy*

Sicamous brothers Greg and Todd Kyllo and their families established the “Kyllo Family Endowment Fund” in March 2015 to support non-profit efforts in the Sicamous area. When Foundation Director Rod Bailey laid out the benefits, they immediately recognized that their own desire to leave a legacy and support the great needs of their community could be realized with the establishment of such a fund. To quote Greg, “I like the principles of the Foundation and feel it is well organized.”



Todd and Greg moved to Sicamous with their family in 1978, when their dad gained employment working on the Revelstoke Dam. Both graduated from Eagle River High School. Greg and Georgina, and Todd and Jolayna started working in the Sicamous-based family houseboat rental business, Twin Anchors, in 1987 and 1994 respectively. In 1994 the manufacturing division was established, designing and building house boats, and in 2005, another division, Twin Anchors Structures, was incorporated, focused on the construction of relocatable office, camp, and modular structures largely deployed in the oil and gas, mining, forestry and construction industries.

Greg has served on Sicamous Council and as Deputy Mayor, and in May of 2013 he was elected as the Member of the BC Legislative Assembly for Shuswap. The decision to enter provincial politics was not an easy one because of the changes it meant for the family, especially the increased time away from home, but Greg acknowledges, “It is a great privilege to serve and help our province.”

Greg and Georgina have four daughters and are now enchanted by four granddaughters. Greg enjoys snowboarding, motorcycling and snowmobiling while Georgina’s passion is Yoga. Georgina and three of her daughters opened a Yoga Studio in Sicamous in 2013 -- remarking cheekily that she needed the Zen of yoga to help balance out the effects of politics on the family. One of the highlights of Georgina’s yoga journey included leading Premier Clark and the BC Government Caucus in an outdoor yoga session last year.

Todd attended Mount Royal College in Calgary to study business administration and human resources and met his wife Jolayna during this time. They moved to Sicamous in 1994 to help run the Twin Anchors business and over the years Todd has been involved in all aspects of the houseboat vacation and manufacturing divisions. Todd has been on various boards and committees and is now a councillor for the District of Sicamous. Jolayna has always worked in the business, but took time off to raise their three daughters when they were young, and now runs the gift shop for Twin Anchors Houseboat Vacations.

Todd and Jolayna and their daughters enjoy skiing at Silver Star, boating on Shuswap Lake as well as softball, dance, volleyball, biking, flying, snowshoeing and snowmobiling. They consider themselves very fortunate to be able to enjoy all the amenities that the Shuswap has to offer.

Through their business experience and public service both locally and provincially, the Kyllo family understands the interconnection of business and community. They also recognize overall community needs to maintain vibrancy and quality of life. With the establishment of the Kyllo Family Endowment Fund this family lives the description of philanthropy used by the Community Foundations of Canada: “Your community makes you and you make your community.”



# Aileen Gentles Memorial Endowment

**A**ileen Gentles, née Barker, was born in Bristol, England, on May 2, 1936. She obtained an Honours degree in History at the University of London, then won a Canada Council scholarship to attend the University of British Columbia, where she completed her Master's Degree. After graduation, she joined a BC theatrical touring group, travelling and performing Shakespeare throughout BC for a year. Concurrently she wrote two radio plays for CBC.

During this period she met Michael Gentles and in 1962 they married. Two children were born: Cynthia in 1964 and Kate in 1966. Mike, also a British expat, had joined the Canadian Army and the family became nomads for the next 29 years, including three postings in Germany as well as to several areas of Canada. Aileen gave herself wholeheartedly to her new role as an army wife and mother, actively participating in all aspects of being the wife of an army officer while also writing skits and plays for the local community, and schools her daughters attended. A great community booster, she was a wonderful motivator, enabling people to achieve things they didn't know they could with her endless encouragement. Singing in a choir was always a must for both Mike & Aileen; they sang in several in Canada and three different choirs during their postings to Germany. Aileen also lectured in History at several universities whenever the opportunity arose.



They knew they wanted to build their dream retirement home near water and found the perfect spot in 1991 beside the Eagle River in Sicamous. Aileen became a driving, creative artistic force in the Shuswap. She was a key member of the Monashee Mountain Arts Society, which fostered the performing arts in the region, and the founder of the Monashee Chamber Choir and the Monashee Chamber Orchestra. She was also instrumental in the creation of the Cambie Farm Theatre.

Endlessly encouraging, vibrant, enthusiastic, perpetually in motion, Aileen was enormously talented. Active in music and theatre her entire life, her list of accomplishments includes writing 17 poems, three children's plays, 58 short stories, 18 musical compositions, two radio plays for CBC, and directing five choirs and five plays, including an outdoor production of 'A Mid-Summer Night's Dream'. She also wrote and directed two musicals, an Oratorio, and three farm theatre plays.

One of her most spectacular achievements was the creation of a two and half hour musical theatre history of the city of Wainwright, Alberta in honour of Alberta's 75 Provincial Anniversary. She did it all: fundraising, getting sponsors, gathering together a cast of 300, organizing volunteers, writing, directing - everything. It was a rousing success and perfectly demonstrates Aileen's indomitable personality. She died on July 30, 2012.

When it was decided to dissolve the Monashee Mountain Arts Society, president Gord Hynek suggested that the funds remaining in the society be used to establish an endowment fund with Shuswap Community Foundation in honour of Aileen. Upon learning of the proposed fund Karla Krens of the Sicamous Theatrical Group asked if they could be included. Together with a contribution from Mike, the Aileen Gentles Memorial Endowment Fund was created in May, 2015.

Income from the fund will be used to award grants to charitable organizations which support the arts in the Shuswap, or to individuals to assist with training and education in the arts, as well as to composers and playwrights for original works, provided such individuals are properly sponsored by charitable organizations.

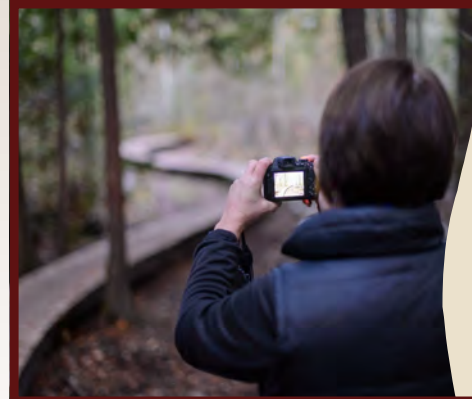
SOME MORE WAYS

# Shuswap Community Foundation

IS HELPING...

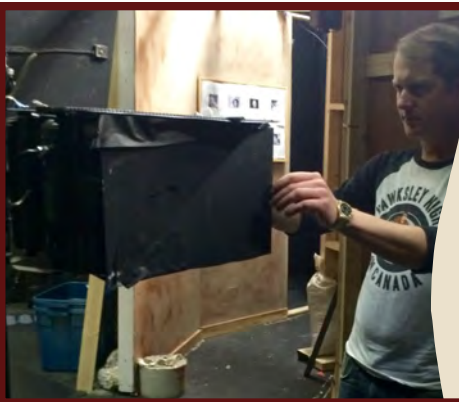


Sicamous and District Seniors Centre Society  
Organize and Fry Event



Shuswap District Arts Council

Trail Mix Project



Shuswap Theatre Society

LED Light Upgrade Project



Eagle Valley Senior Citizens Housing Society  
Lodge SPA Room Shower Renovation



Turtle Valley Donkey Refuge Society  
Audio/Visual Security System for Barns



Shuswap Assoc. of Writers

2016  
Writer's Festival



SHUSWAP  
**COMMUNITY**  
FOUNDATION

BROUGHT TO  
YOU BY THE

191

COMMUNITY  
FOUNDATIONS  
OF CANADA



COMMUNITY  
FOUNDATIONS  
OF CANADA  
all for community.

## SHUSWAP MUSIC FESTIVAL - 16TH ANNUAL SHUSWAP MUSIC FESTIVAL



In 2016, the Shuswap Music Festival Society received a grant in the amount of \$1,500 to help fund the cost of venues and piano moving and tuning for the 16th Annual Shuswap Music Festival. Over 500 musical entrants performed at this year's Festival and an estimated \$4,795 in grants and awards were given out.

This grant was made possible by the Geoff and Judith Benson Family Endowment Fund.

## SHUSWAP HUT AND TRAIL ALLIANCE SOCIETY - EVELYN FALLS TRAIL PROJECT



In 2015, The Shuswap Hut and Trail Alliance received a \$2,500 grant from SCF to prepare a new 1.5 KM nature trail above Anglemont to ensure protection of the forest and creek environment.

The objective was to complete the installation of three trailhead filter stiles, five directional signs, a short switchback staircase, and two rock armored tread sections.

This grant was made possible by the Gerry & Rita Chu Endowment, Robin Jackson Environmental Endowment and the SASCUC Community Funds.

## CANADIAN RED CROSS - H.E.L.P. DEPOT SALMON ARM PROJECT



In 2014, the Salmon Arm HELP Depot (Canadian Red Cross) requested funds to do the much needed repairs to the inside and outside of the depot. Volunteer response was enthusiastic and generous, so not all of the funds were used in this project. A secondary grant request was made to use the remaining funds to purchase medical equipment; 20 folding walkers and 15 four-wheeled walkers were purchased. It is estimated that 140 clients will benefit from this grant.

Project Report Quote: *"The health care professionals who refer all our clients are well aware of how much equipment is in stock so they usually limit their referrals to low income clients- this is why our data (Canadian Red Cross) shows that roughly 47% of Salmon Arm residents are low income, making less than \$20,000 per year."*

This grant was made possible by the Earl and Muriel MacKenzie Family Endowment, Higgins Family Endowment, Cummings/Kassa Endowment, and Browne Johnson Legacy Funds.

# Spring Grants

Spring Grant Recipients	Grant
<b>222 RCACS Sponsoring Committee</b> <b>Project:</b> Upgrade Squadron Camping Supplies <b>Fund:</b> SCF Community Fund	\$1,500
<b>Arts Council for the South Shuswap</b> <b>Project:</b> 2016 Children's Theatre Production & Festival <b>Fund:</b> SCF Community Fund	\$3,600
<b>Eagle Valley Rescue Society</b> <b>Project:</b> Rope Rescue Training for 12 people <b>Fund:</b> C. Norman Barber Endowment , Shuswap Coordinating Training Society Endowment, Marian and Ralph Segreto Endowment and SCF Community Funds	\$5,000
<b>Okanagan College</b> <b>Project:</b> Adult Academic Career Prep Program <b>Fund:</b> Ev Painter Endowment Fund	\$1,118
<b>Salmon Arm Folk Music Society</b> <b>Project:</b> Office Building Upgrade <b>Fund:</b> Lloyd and Dorothy Askew Family Endowment , Geoff and Judith Benson Family Endowment Funds	\$6,000
<b>Salmon Arm Museum and Heritage Association</b> <b>Project:</b> Okanagan Historical Society Brochure <b>Fund:</b> Lloyd and Dorothy Askew Family Endowment and SCF Community Funds	\$2,060
<b>Salmon Arm Museum and Heritage Association</b> <b>Project:</b> Taking Care of Business - designing exhibits <b>Fund:</b> Lloyd and Dorothy Askew Family Endowment Fund	\$2,250
<b>School District 83 North Okanagan Shuswap</b> <b>Project:</b> Shuswap String Orchestra Society <b>Fund:</b> Geoff and Judith Benson Family Endowment Fund	\$2,500
<b>School District 83 North Okanagan Shuswap</b> <b>Project:</b> School Nordic Ski Program - Ski equipment to outfit 6 schools <b>Fund:</b> Wainwright Mobley Memorial Fund	\$5,000
<b>Shuswap Area Family Emergency Society</b> <b>Project:</b> Air Conditioning in Women's Shelter <b>Fund:</b> Lloyd and Dorothy Askew Family Endowment, Gerry and Rita Chu Family Endowment and SCF Community Funds	\$1,500

# Spring Grants Continued

<b>Shuswap Children's Association</b> Project: Equipment purchases Fund: Lloyd and Dorothy Askew Family Endowment and SCF Community Funds	\$3,000
<b>Shuswap Day Care Society</b> Project: Outdoor Shade Structure Fund: Wainwright Mobley Memorial Fund	\$2,000
<b>Shuswap District Arts Council</b> Project: Shuswap Association of Writers 2016 Festival Fund: Geoff and Judith Benson Family Endowment Fund	\$3,000
<b>Shuswap Family Resource and Referral Society</b> Project: Community Garden in Salmon Arm Fund: SASCU Community Endowment and SCF Community Funds	\$4,000
<b>Shuswap Hospice Society</b> Project: Expanded Community Outreach Fund: SCF Community Fund	\$2,000
<b>Shuswap Hospital Foundation</b> Project: Automated Ankle Brachial Index Machine Fund: Sorrento Lions Club - Catherine Dilworth Memorial Fund	\$3,192
<b>Shuswap Hut and Trail Alliance Society</b> Project: 2016 Trail Mix Art Project - extended printing Fund: SASCU Community Endowment and Paul and Jane Burrows Endowment Funds	\$2,500
<b>Shuswap Lifeboat Society</b> Project: Kids Don't Float Program Fund: SCF Community Fund	\$2,336
<b>Shuswap Music Festival Society</b> Project: 16th Annual Shuswap Music Festival Fund: Geoff and Judith Benson Family Endowment Fund	\$1,500
<b>South Shuswap First Responders</b> Project: Approved Safety Jackets for First Responders Fund: Sorrento Lions Club- Catherine Dilworth Memorial Endowment , SCF Community Funds	\$6,000
<b>Total Spring Grants</b>	<b>\$60,056</b>

# Fall Grants

Fall Grant Recipient	Grant
<b>Malakwa Community Centre Association</b> <b>Project:</b> Electrical move and upgrade for a new community hall <b>Fund:</b> Anonymous Eagle Valley Seniors Endowment , Rob Bailey Endowment, Marian and Ralph Segreto Endowment, John and Ingrid Monk Endowment, Albert and Muriel Spencely Endowment, Ulrich and Margarete Schoene Family Endowment, Reid and Wright Families Endowment	<b>\$6000</b>
<b>NeighbourLink Shuswap /Second Harvest</b> <b>Project:</b> Fruit Dehydrators <b>Fund:</b> Bill and Mary Douhaniuk Endowment	<b>\$1600</b>
<b>Shuswap Theatre Society</b> <b>Project:</b> Upgrade lighting board <b>Fund:</b> Geoff and Judith Benson Family Endowment, Nina Dickins Family Endowment, Rosemarie's Fund, David Wood and Jean Bleakley Endowment, Aileen Gentles Memorial Endowment	<b>\$5000</b>
<b>Literacy Alliance of the Shuswap (LASS)</b> <b>Project:</b> 5 little free libraries <b>Fund:</b> Wainwright Mobley Memorial Endowment	<b>\$2000</b>
<b>Literacy Alliance of the Shuswap (LASS)</b> <b>Project:</b> Books Under the Tree <b>Fund:</b> Wainwright Mobley Memorial Endowment, Jennifer Phillips Memorial, Higgins Family Endowment, Gertrude and Ludwig Klein Memorial, Gordon Priestman Memorial Endowment	<b>\$2000</b>
<b>Shuswap District Arts Council</b> <b>Project:</b> 150 Voices <b>Fund:</b> Higgins Family Endowment, Youth Endowment	<b>\$1500</b>
<b>Eagle Valley Seniors Housing Society/Eagle Valley Seniors Meal Society</b> <b>Project:</b> Reusable Food Containers <b>Fund:</b> John and Ingrid Monk Endowment, Gordon and Bev Marshall Family Endowment, Higgins Family Endowment	<b>\$2000</b>
<b>Eagle Valley Senior Housing Society</b> <b>Project:</b> Accessibility doors for their two locations <b>Fund:</b> C. Norman Barber, John and Ingrid Monk Endowment, Seniors Project, Reid/Wright Families Endowment, Lynda Nicholson/Allen Ferguson Endowment, Derby /Derkaz Family Endowment, Higgins Family Endowment	<b>\$6600</b>
<b>Okanagan College</b> <b>Project:</b> Shuswap BookFest <b>Fund:</b> Ev Painter Endowment, Letham Family Endowment, Tom and Elsie Brighthouse Family Endowment, Rick and Linda Hirtle Family Endowment	<b>\$3500</b>
<b>Eagle Valley Community Support Society</b> <b>Project:</b> Phone system and waiting room furnishings <b>Fund:</b> John and Ingrid Monk Endowment, Kylllo Family Fund, Maurice Gillis Memorial Endowment	<b>\$2500</b>
<b>Sicamous and District Seniors Centre Society</b> <b>Project:</b> Keep the Music Flowing <b>Fund:</b> Gertrude and Ludwig Klein Memorial Endowment, Earl and Muriel MacKenzie Endowment, and Turner Orchards Endowment	<b>\$3000</b>
<b>Kamloops Symphony Society</b> <b>Project:</b> Salmon Arm Concert Series 2016-2017 <b>Fund:</b> Gertrude and Ludwig Klein Family Endowment, Enid Finn Memorial Endowment	<b>\$2500</b>
<b>Arts Council for the South Shuswap</b> <b>Project:</b> Purchase sound system <b>Fund:</b> Doreen McCaig Memorial Endowment, Brooke Downs Vennard-LLP Endowment, Catherine and Joseph Shay Memorial Endowment, Higgins Family Endowment, Sorrento Lions Club- Catherine Dilworth Memorial Endowment	<b>\$8486</b>
<b>RCAC 222 Squadron</b> <b>Project:</b> Replacement of missing and damaged textbooks <b>Fund:</b> SASCU Youth Endowment, Shuswap Training and Coordinating Society	<b>\$1000</b>
<b>Total Fall Grants</b>	<b>\$47,686</b>

# New Endowment Funds

Established between July 1, 2015 to June 30, 2016

## **DISCRETIONARY - NO LIMITATIONS**

- ◆ Albert and Muriel Spencley Memorial Endowment
- ◆ Catherine and Joseph Shay Memorial Endowment
- ◆ Doreen McCaig Memorial Endowment

## **DISCRETIONARY—MATCHING FUNDS PROGRAM**

- ◆ Brooke, Downs, Vennard LLP Endowment
- ◆ Dave Neale Memorial and Trinity Neale Endowment
- ◆ David Wood and Jean Bleakley Endowment
- ◆ Gordon Priestman Memorial Endowment
- ◆ Harry, Thelma and Patricia May Endowment
- ◆ Howard Johnston Memorial Endowment
- ◆ Ian Duncan and Maureen Stickney Endowment
- ◆ Sheldon and Karen Pukas Family Endowment
- ◆ Ulrich and Margarete Schoene Family Endowment

## **DISCRETIONARY- LIMITATIONS**

- ◆ Steve Guidone and Jaki Greenhough Endowment

## **NON-DISCRETIONARY—DONOR DIRECTED**

- ◆ Bill and Peggy Kernaghan Family Endowment
- ◆ Class of '77 - David MacKay Memorial Endowment

## **NON-DISCRETIONARY—AGENCY**

- ◆ Okanagan Regional Library (Shuswap) Endowment
- ◆ Sorrento and Area Health Centre Endowment

# 2016 Donor Directed Grants

FUND	GRANT	RECIPIENT/PURPOSE
Al Neale Bursary	\$7,000	Gary Baker, Katherine Garrett, Shannon LaViolette, Fiona Vandergucht, Aaron Fredborg
Beryl Herdan and Al Neale Endowment	\$935	Funds to CMHA (Shuswap/ Revelstoke)
Bill and Mary Douhaniuk Memorial	\$1,689	Shuswap Hospital Foundation
Bill and Peggy Kernaghan Family Endowment	\$47	Earnings reinvested in fund
Bill MacDonald Memorial	\$700	Local Chapter Canadian Cancer Society
Braby Family Endowment	\$400	Earning to First United Church, Salmon Arm
Brad Jackson Scholarship	\$1,000	School District 83 Awarded to Seth Van Varseveld
Bruce Hall Memorial Endowment	\$124	Earnings reinvested in fund
Canadian Mental Health Association Shuswap/Revelstoke Branch	\$935	CMHA
Centennial Reunion Scholarship	\$350	School District 83 Awarded to Makayla Caterer
Clara Anderson Endowment	\$211	Earnings reinvested in fund
Class'77- David MacKay Memorial Endowment	0	New Fund
David John Stratton Memorial Bursary	\$650	School District 83 Awarded to Karl Hiscock
Dearing Family Endowment	\$500	School District 83
Dorothy Longdo Endowment	\$6,300	School District 83 Awarded to David Bakker
Douglas Burkitt Memorial Fund	\$626	Shuswap Hospital Foundation
Elisabeth Thomi Endowment Fund	\$67,469	BCSPCA- Shuswap Branch
Eve and Christopher Wright Scholarship	\$750	Katherine Garrett
Fowler/Gomme Family Endowment	\$1,200	Shuswap Music Festival 2016 Awarded to Paige Tower
Frank and Rita Smuin Memorial Bursary Fund	\$1,000	School District 83 Awarded to Cara Wurst
Henderson Award in International Development Fund	\$3,000	First United Church Community Refugee Committee
Jack and Edith Stead Endowment Fund	\$2,348	Salmon Arm Museum and Heritage Association

# Donor Directed Continued

Jack and Edith Stead Hospital Endowment Fund	\$511	Shuswap Hospital Foundation
Janet Pattinson - Shuswap Naturalist Club Bursary Fund	\$1,200	TRU - Scholarship and Bursary Program
Lisa Rolland Children's Literacy Fund	\$1,000	Earning to school district 83
Lloyd and Joy Johnston Family Endowment Fund	\$4,385	Shuswap Hospital Foundation
Lloyd and Joy Johnston Family Endowment Fund	\$2,365	Shuswap Recreation Society
Loyola Elliott Bursary Fund	\$250	Earning reinvested to fund
Marie Manson Memorial Art Award Fund	\$1,800	Awarded to Kathy Martell and Kathy Atkins
Morris Bursary Fund for Excellence in Mathematics	\$2,000	School District 83 Awarded to Faye Lucey
Nayki/Greer Family Endowment Fund	\$2,000	School District 83. Award to Jayden Lawson
Nayki/Greer Family Endowment Fund	\$2,000	BCSPA- Shuswap Branch
Nick and Marilyn Brown Family Fund	\$1,200	Laureen Shannon
Ready Family Endowment Fund	\$885	Shuswap Hospice Society
Ready Family Endowment	\$885	S.A.F.E. Society
Salmon Arm Kinsmen and Kinette Scholarship	\$2,000	School District 83 Awarded to Koryn de Vries
Salmon Arm Secondary Athletic Endowment	\$1,500	School district 83 for SASS Athletic Program
Shane Gorner Memorial Endowment	\$500	School District 83 Awarded to Jame Wonacott
Shuswap Branch, B.C.S.P.C.A. Endowment	\$4,148	BCSPCA- Shuswap Branch
Shuswap Volunteer Firemen's Association Cody Davies Memorial Bursary	\$800	School District 83 Awarded to Tricia Fair
Steve Heal Memorial Scholarship	\$800	School District 83 Awarded to Chad Baker
Susan Latimer Bursary	\$35	Earning reinvested in fund
Tom Brush Memorial Scholarship	\$700	School District 83 Awarded to Colton Sherwood
Tomas Idzan Memorial Bursary	\$700	Salmon arm Scholarship Trust Fund
Walter Ellaschuk Memorial Bursary	\$1,500	School District 83 Awarded to Steven Stanover and Danai Kylo
Wayne Williamson Memorial	\$302	Earning reinvested in fund

# Agency Grants

FUND	GRANT	RECIPIENT/PURPOSE
Anglican Parish of Salmon Arm - Sicamous Endowment	\$1,259	Earning to fund holder
City of Salmon Arm Endowment	\$9,595	Earnings reinvested into fund
Seniors Resource Centre - Fletcher Park Endowment	\$740	Earnings reinvested into fund
North Okanagan- Shuswap School District Endowment	\$3,500	Earning to School District 83 for scholarships and bursaries
Okanagan College	\$7,000	Earning to fund holder
Okanagan Regional Library (Shuswap) Endowment	\$10	Earning to fund holder
Royal Canadian Air Cadet 222 Shuswap Squadron Endowment	\$124	Earnings reinvested into fund
SABNES Endowment	\$645	Earning to fund holder
Salmon Arm College Scholarship Trust Fund -George and Nancy Clark Memorial Bursary	\$5,000	Awarded to Sean Rossouw, Steven Vas
Salmon Arm College Scholarship Trust Fund -Len O'Neill Memorial Award	\$4,500	Awarded to Duncan MacGregor, Rebecca McDonald , Teryn Danforth
Salmon Arm College Scholarship Trust Fund -Vicki Hitchen Memorial Award	\$4000	No Recipients, fund reinvested into fund
Salmon Arm Museum and Heritage Association Endowment Fund	\$8,293	Earning to fund holder
Salmon Arm Museum and Heritage Association - Peterson Family Fund	\$3,577	Earnings to Salmon Arm Heritage Association
Shuswap Area Family Emergency Society Endowment Fund	\$690	Earnings to fund holder
Shuswap Art Gallery Association Endowment Fund	\$21,247	Earning to fund holder
Shuswap Community Foundation Administration Fund	\$3,931	Earnings to support administration of SCF
Shuswap District Arts Council Endowment Fund	\$2,714	Earning to fund holder
Shuswap District Arts Council Endowment Fund - Blair Borden Memorial	\$1,700	Awarded to Elaine Holmes
Shuswap District Arts Council Endowment Fund -T.O.N.A.C.	\$373	Earnings to fund holder for regional meeting
Shuswap Hospice Society Fund	\$2,178	Earning to fund holder
Shuswap Hospital Foundation Endowment Fund	\$1,643	Earning to fund holder
Shuswap Hut and Trail Alliance Society Endowment Fund	\$268	Earnings reinvested into fund
Shuswap Theatre Society	\$750	Earnings reinvested into fund
Sorrento and Area Community Health Centre	\$150	New Fund
<b>Total 2016 Donor Directed and Agency Grants</b>	<b>\$214,585</b>	

# Catherine and Joseph Shay

## Foundation Founders

Catherine Shay, *Kay* to her friends, was a quiet woman who truly loved the Shuswap. She was born in 1923 in Cologne, Germany to Anna Louise and William Tyson (her father was with the British Army of Occupation following World War I). Kay's family immigrated to Canada in 1930, settling at Herschel, Saskatchewan. It was here that she met her husband, Joe.

Joe and Kay moved to Salmon Arm in the late 1940s, settling on a small holding in the Ranchero area. Joe operated a painting and decorating business until 1969.

He passed in 1973, and Kay moved into an apartment in town. Kay did not travel much: she was content with life in the Shuswap.

Kay was also a big fan of the Shuswap Community Foundation. She made a contribution to the Founders Fund in memory of husband Joe, and when she died in September 2001, Kay left a very substantial testamentary gift. Generations to come will benefit from Kay Shay's manifestation of her love for, and her support for, our community.

In May of 2016, the Catherine and Joseph Memorial Endowment Fund was created. Income from the Fund will, in accordance with the provisions of Mrs. Shay's will, be disbursed annually, at the discretion of the Directors of the Foundation, to award one or more grants in the name of the Fund to qualified charitable organizations operating in the Shuswap area.

SCF Board recently recognized the legacy of Catherine by establishing the Catherine and Joseph Shay Memorial Endowment Fund.

Donations to this Fund are welcome any time.



# Foundation Founders

- ◆ The Askew Family
- ◆ Wendy and Edward Apted
- ◆ Muriel and Frank Barnard
- ◆ Marcia and Jim Beckner
- ◆ Margaret and Sid Bedwell
  - ◆ Thomas Bowers
- ◆ 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
- ◆ Joyce and John Henderson
  - ◆ Lois and Harry Higgins
  - ◆ Joan and Colin Hill
  - ◆ Linda and Rick Hirtle
- ◆ Annie and RW Holliday
  - ◆ 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
  - ◆ Ingrid and John Monk
- ◆ Agnes and Morrie Morrison
- ◆ Doris and Norman Murray
- ◆ Jennie and Vic Nancollas
  - ◆ 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
  - ◆ SASCU
  - ◆ 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
  - ◆ The Ujimoto Family
  - ◆ Lynn and Ian Wickett
  - ◆ Eve and Chris Wright

# McGuire Lake Memorial Walkway

## Brick Purchases

### July 1, 2015 to June 30, 2016

- ◆ Lila Elaine Barvir for Anton (Tony) Barvir
- ◆ Alan Bates for Bill and Peggy Bates
- ◆ Jill Bingham for Al Bingham
- ◆ Brenda Clingwall for Edgar and Gwen Clingwall
- ◆ Glenda Marchand for Allan (Alain) Marchand
- ◆ Rochelle and Brian Marr for Marion (nee Paynter) and Sid Marr
- ◆ Chris Noble for Kenneth I. and Margaret A. Noble
- ◆ Helen Willis for Dennis Russell Willis
- ◆ Fredrick Wood for Betty Ann Wood and Thomas S. Wood
- ◆ Lillian Whitehead for Robert (Bob) Whitehead

## In Memoriam

Eric Aitken  
 Patrick Allwood  
 Sherry Arko  
 Frank Barnard  
 Douglas Burkitt  
 Jack Davies  
 Barry Dearing  
 John Doerksen  
 Ian Duncan  
 Loyola Elliot  
 Griselda Evans  
 Maurice Gillis  
 Shane Gorner  
 Guy Graham  
 Jaqueline Heal  
 Wilson  
 Margot Hewitt  
 Harry Higgins  
 Anne Hilna  
 Brad Jackson  
 Peter Jennings  
 Linda Klein  
 Ron Lee  
 Bruce Leggett  
 Barry Lipsett  
 Bill MacDonald  
 David MacKay  
 Peigi MacMillan  
 Bethan Marchuk  
 Denis Marshall  
 Doreen McCaig  
 Len O'Neil  
 Jennifer Phillips  
 Verna Pollard  
 Gordon Preistman  
 Shayne Ready  
 Trenna Scott  
 Tess Trueman  
 Rosemarie Vennard  
 Dave Williamson  
 Morris Woodland

## In Honor

Alice & Bill Phillips  
 Joan Marshall



## Making Memorable Moments Matter

Shuswap Community Foundation in partnership with the City of Salmon Arm to provide a permanent place for your memorable moment.

## Albert and Muriel Spencley

Albert Harry Spencley passed away peacefully May 12, 2014 at the age of 93 years. Born in Burleigh Falls, Ontario on April 26, 1921. He worked as a contractor, the first 20 years in the Oil Industry, followed by general contract work in many locations of Canada. Albert was also a war veteran working with construction of Army Barracks in Ontario.

Muriel was born in Horsham, Sussex, England on August 31, 1922. Early years were not easy for Muriel, and ailing health required her to move into a care facility in March of 2010. Muriel passed away December 28, 2010 at the age of 88 years. She is well remembered for her caring manner, always smiling, her dedication with her Christianity, and willingness to assist others.

Albert met the love of his life, Muriel, in Ontario. With a planned trip to visit family in Victoria they stopped in Salmon Arm, enjoying the scenery, they purchased a home. They lived in Salmon Arm for 20 years before moving to Enderby. Albert is well remembered for his dedication with Muriel and spending countless hours assisting her during her final months in a care home in Armstrong.

Giving back to the community was important for Albert and Muriel, years of dedication with St. John's Anglican Church in Salmon Arm, and then the Seventh Day Church, as well as both were members of Shuswap Singers. Albert was a very independent gentleman, his home was his castle; He was determined to continue living at home with nobody fussing over him.



## Doreen McCaig

Doreen was born in Vegreville, AB on October 7, 1935. The family later moved to Grimshaw. She married Bruce McCaig in 1954 and they relocated from Calgary to Salmon Arm in 1958. She first worked at the Bank of Commerce prior to opening her flower shop, the House of Flowers, in 1974.

Doreen gained great respect for her artistic ability with flowers and for her prowess and love of baking. Her pies, cakes and bread earned her many awards at the Fall Fair, where she convened the baking section for many years.

She loved hosting dinner parties, both casual evenings with friends and extravagant dinners complete with hand written menus and fabulous table settings. Of course the evening would not have been complete without suitable beverages. A very few lucky brides also had their wedding cakes prepared by Doreen.

She was an avid reader and very proud of her skills as a wordsmith. She was a well-rounded reader with wide ranging interests. Her full size, unabridged dictionary held pride of place in her living room. Her extensive library brought her a great deal of satisfaction.

A love of animals was Doreen's trademark. She was especially fond of marmalade cats but no matter the colour any stray cat received her love, a home and veterinary care. Doreen had a sense of humour like no other and she always said if you couldn't laugh, especially at yourself, there was no use in living. Her idea of humour closely paralleled that of Maxine, her favourite cartoon character. This attribute stood her in good stead when facing the challenges that life threw at her.



# Community Building - Matching Funds Program

During our Annual Community Meeting last October, SCF announced the Community Building-Matching Funds Program. This program has received a tremendous response from donors over the past year. You will note on page 3 of this Report, we have eight new funds established with a total of \$45,588 in funds matched. As these Community Building funds grow so does the ability of SCF to provide grants to a wide range of needs in our Shuswap communities.

In early 2016 we received a bequest from the Doreen McCaig estate and in her memory SCF created the Doreen McCaig Memorial Fund. The Deed of Gift provides another \$50,000 to our Matching Funds program. With these added funds to the program and the great donor response, SCF Board has extended the program to December 31, 2016.

To learn more about our Community Building - Matching Funds program please see our website at [shuswapfoundation.ca](http://shuswapfoundation.ca)



## DONATE TODAY!

Philanthropy doesn't come in just one shade or size. People worldwide donate what money and time they can to further the well-being and creative endeavours of others.

Through their generous donations, the marginalized are helped, our cultural life is vibrant, scholarships and bursaries build productive students and universities, and hospitals are better equipped.

Your decision to donate is the first step in your philanthropy journey.

## DOLLAR FOR DOLLAR

### The Community Building - Matching Funds Program

**Funds to be Matched**

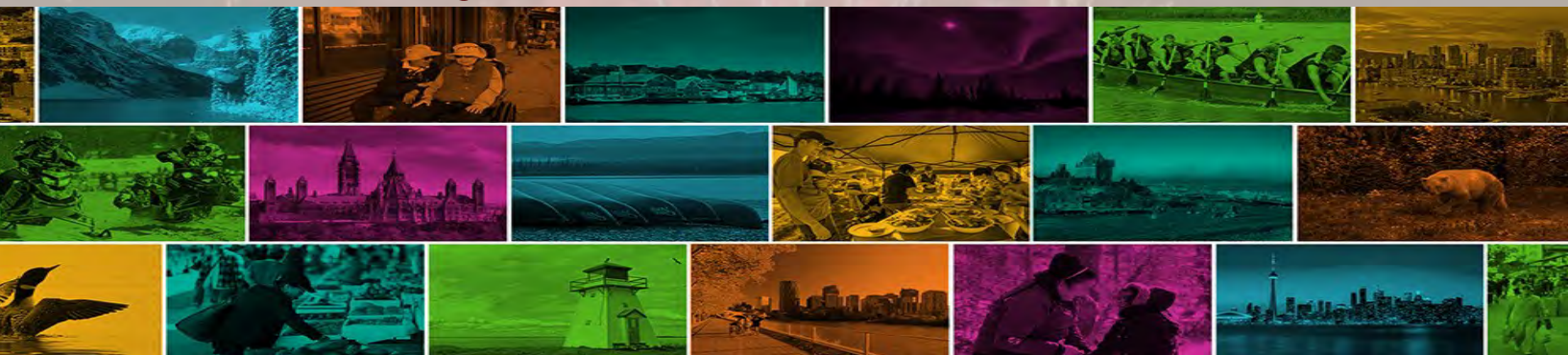
**\$104,200**

**Funds Matched to Date**

**\$50,588**



# Community Fund for Canada's 150th



SCF in collaboration with the Community Foundations of Canada and with support from the Government of Canada and national philanthropy leaders are pleased to bring the Community Fund for Canada's 150th.

The Fund will engage Canadians from all walks of life in a wide range of local projects that build community, inspire a deeper understanding of Canada, and encourage participation in a wide range of initiatives that mark Canada's 150th anniversary of Confederation.

For more information on the involvement of Shuswap Community Foundation in the Community Fund for Canada's 150th please visit our website at [shuswapfoundation.ca](http://shuswapfoundation.ca).

## Community Building -Matching Funds Program

During our Annual Community Meeting last October, SCF announced the Community Building-Matching Funds Program. This program has received a tremendous response from donors over the past year. You will note on page 2 of this Report, we have eight new funds established with a total of \$45,588 in funds matched. As these Community Building funds grow so does the ability of SCF to provide grants to a wide range of needs in our Shuswap communities.

In early 2016 we received a bequest from the Doreen McCaig estate and in her memory SCF created the Doreen McCaig Memorial Fund. The Deed of Gift provides another \$50,000 to our Matching Funds program. With these added funds to the program and the great donor response, SCF Board has extended the program to December 31, 2016.

## SHUSWAP MUSIC FESTIVAL - PROJECT: 16TH ANNUAL SHUSWAP MUSIC FESTIVAL



In 2016 the Shuswap Music Festival Society received a grant in the amount of \$1,500 to help fund the cost of venues, and piano moving and tuning for the 16th Annual Shuswap Music Festival.

Over 500 musical entrants performed at this year's Festival and an estimated \$4,795 in grants and awards were given out.

This grant was made possible by the Geoff and Judith Benson Family Endowment Fund.



# SHUSWAP'S VitalSigns<sup>®</sup>

taking the pulse of our community...

As part of our 2014 Vital Signs project, the SCF community survey resulted in a low grade in the issue area of the “Gap between Rich and Poor”. To facilitate a conversation with members of the Shuswap communities, SCF is encouraging non-profit groups to develop a project which works towards improving the current status of our residents faced with economic challenges. This is an opportunity for non-profit societies and registered charities to collaborate to form partnerships to achieve change.

The Foundation is requesting an opportunity to meet with your board to discuss our proposal and receive input from you how best to facilitate this goal. We invite you to contact the office for further details.

BROUGHT TO  
YOU BY THE

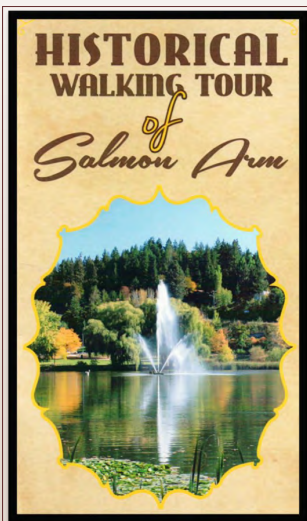


COMMUNITY  
FOUNDATIONS  
OF CANADA



COMMUNITY  
FOUNDATIONS  
OF CANADA  
*all for community.*

## **OKANAGAN HISTORICAL SOCIETY PROJECT: HISTORICAL WALKING TOUR BROCHURE**



In 2016 the Okanagan Historical Society- Salmon Arm Branch in partnership with the Salmon Arm Museum and Heritage Association - Salmon Arm Branch received a \$2,060 grant from SCF to design and print a new brochure for the Historical Walking Tour of Salmon Arm,

This grant was made possible by the Lloyd and Dorothy Askew Family Endowment and SCF Community Funds.

# Royal Canadian Air Cadet 222 Shuswap Squadron

In 1941, the Royal Canadian Air Cadets (RCAC) was chartered, with one of its main purposes to “train up” Canadian youth to replace air crews overseas when they became old enough to join the Royal Canadian Air Force (RCAF) at age 18.

Girls were officially allowed to join in 1975. RCAC 222 Shuswap Squadron, formed in November 1993 through the hard work of Don and Maye Cann, Barry and Rhonda Henry, and Jim Hall, derived its name from the ‘Royal Air Force (RAF) 222 (Natal) Squadron’, created in April 1918. Shuswap Squadron was granted its own crest, which incorporates the Spitfires flown by the RAF 222 Squadron, and their motto, “Pambil Bo”, a Zulu phrase meaning “go straight ahead”, in 2007.

The main objectives of the program are to promote good citizenship, leadership and physical fitness, and to stimulate an interest in aviation. Funding is a partnership between the Department of National Defense (DND) and the local Sponsoring Committee.

Cadets who participate in the program learn valuable skills in the areas of leadership, teamwork and citizenship which will serve them well for the rest of their lives. They can also earn up to 12 high school credits for advanced training. Most importantly, they form life-long friendships.

The Squadron is able to offer these opportunities to the youth of the Shuswap/North Okanagan at no charge due to the dedication and fundraising efforts of parents and cadets as well as the generosity of many organizations in the Shuswap, including Shuswap Community Foundation, and numerous individuals who have donated both time and money to help make the program successful.

The decision to create the Royal Canadian Air Cadet 222 Shuswap Squadron Endowment Fund was taken in order to achieve two ends: to provide a vehicle whereby the Squadron’s J. B. Millar Flying Scholarship can grow to cover the costs required for power pilot cadets to maintain their private pilot’s licence for the first year, and to provide a stable source of funding for the basic program so it can continue to be offered at no charge, as well as optional activities not covered by DND for youth in the Shuswap.



ROYAL CANADIAN AIR CADETS - 222 SQUADRON  
SPRING 2016

# Tom Pugh Memorial Endowment



“Tornado Tom” taught his mom and dad how to parent. He was too smart for his own good; witty, acerbic, funny, and lots of fun, they would tease him about using his genius for good, not evil. Tom had great friends; their home was where all his buddies would congregate. One of Tom’s school buddies remembers ‘always having a blast stirring up trouble downstairs at your house.’

Dawn Dunlop and Mark Pugh, along with six year old Tommy, and five year old Jack left Manitoba in 2001, settling in Salmon Arm, where Tom finished Grade one. Mitch came along in 2003 to complete the family.

An enterprising young man with a strong, ‘prairie farm’ work ethic, Tom got his first job when he was 13, working at the Salmar Theatre. One summer he actually had four jobs! After graduating from SAS in 2013, he headed off to the oil patch, only 17 years old. He wasn’t afraid of hard work.

Although not a ‘natural’ athlete, Tom was involved in various sports during his school years. His coaches enjoyed his energy and his big personality. However, his passion was downhill skiing. He loved skiing powder at Revelstoke.

An undiagnosed condition caused Tom to have a fatal heart attack in his sleep on September 11, 2014. His family feels blessed for the 19 years they had with him.

*“Instead of asking why they left, now I ask, what beauty will I create in the space they no longer occupy?” ~ Rudy Francisco*

Tom is gone, but he will never be forgotten. The family has established the Tom Pugh Memorial Endowment Fund with Shuswap Community Foundation in honour of Tom’s love of his family, friends and all things Shuswap. As the fund has now reached \$10,000, interest earned will be disbursed annually to qualified charitable organizations operating in the Shuswap area, to fund projects intended to protect or improve the natural landscape or to otherwise address environmental issues, as well as programs which promote community recreation.

Donations to this Fund are welcome any time.

# 2016 Financial Report

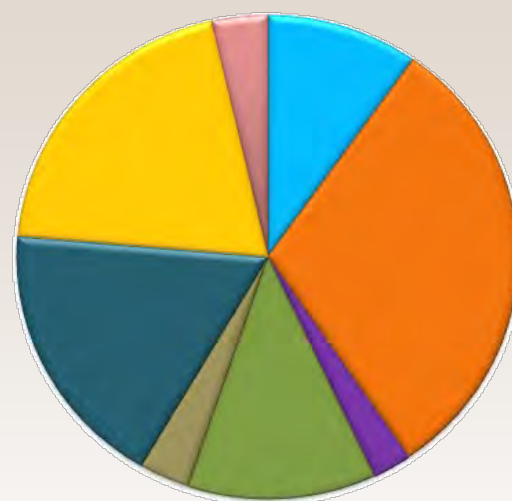
## Asset Mix

### Statement of Financial Position

June 30, 2016 with comparative figures for 2015

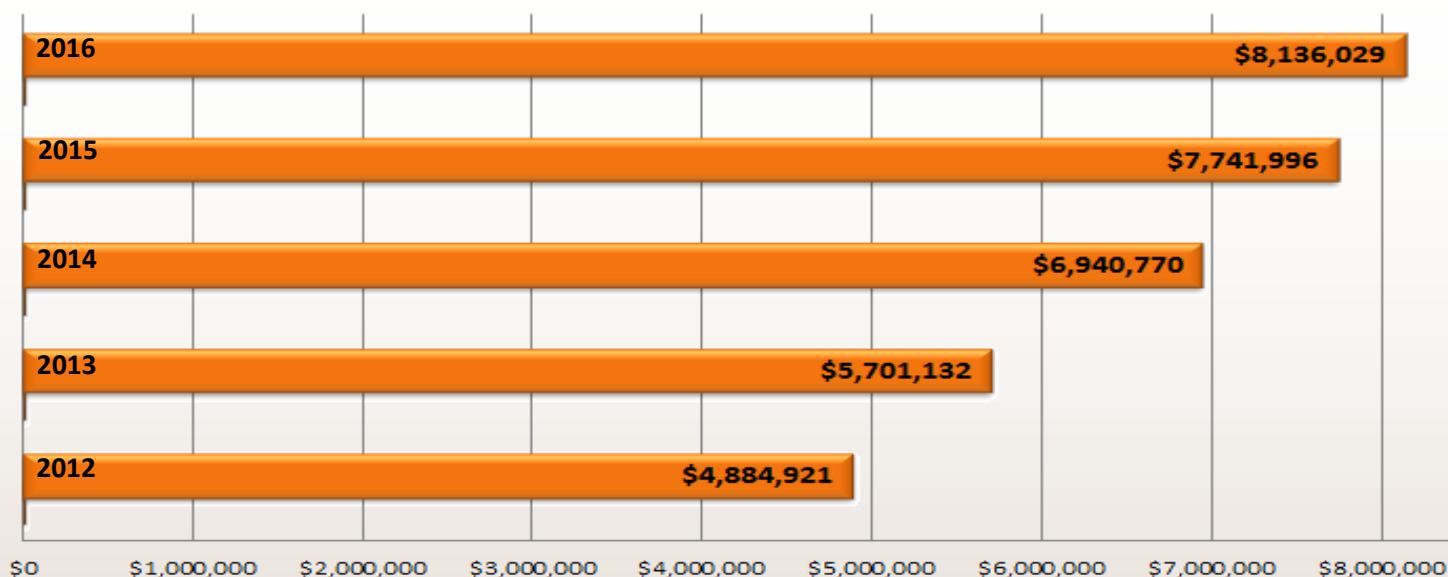
An unreviewed summary of Shuswap Community Foundation's financial position at June 30, 2016.

ASSETS	2016	2015
<b>Current Assets:</b>		
Cash & Cash Equivalents	\$118,671	\$113,889
Accounts Receivable	889	871
Prepaid Expenses	788	808
	<b>\$120,348</b>	<b>\$115,568</b>
Investments at Market	8,074,835	7,691,630
	<b>\$8,195,183</b>	<b>\$7,807,198</b>
<b>LIABILITIES AND FUND BALANCES</b>		
<b>2016</b>		
<b>2015</b>		
<b>Current Liabilities:</b>		
Grants and Accounts Payable	\$14,782	\$15,785
Deferred Revenue (Admin)	5,500	14,350
Funds held for Third Parties	1,944	2,163
	<b>\$22,226</b>	<b>\$32,298</b>
<b>Fund Balances:</b>		
Endowment Funds	\$8,136,028	\$7,741,996
Unrestricted Assets	36,929	32,904
	<b>\$8,172,957</b>	<b>\$7,774,900</b>
	<b>\$8,195,183</b>	<b>\$7,807,198</b>
<b>Investments consist of the following:</b>		
Mawer Balanced Fund Class O		\$8,019,913
Life Insurance Policy		54,922
<b>Total Investments</b>		<b>\$8,074,835</b>



Cash Equivalent	9.86%
Canadian Fixed Income	30.59%
Global Fixed Income	2.54%
Canadian Large Cap	12.17%
Canadian Small Cap	3.26%
US Equity	17.95%
Inter Equity	20.06%
Global Small Cap	3.57%

## Capital Funds Growth Between 2012-2016



NOTES TO FINANCIAL STATEMENTS	2016	2015
<b>Investment Income Earned during the year:</b>		
Interest and Dividends	\$271,327	\$144,192
Realized Gains/(losses)	58,037	55,254
Unrealized Gains/(losses)	128,480	655,766
Life Insurance	(1,220)	1,522
	<b>\$456,624</b>	<b>\$856,734</b>

**Statement of Revenue and Expenses and Changes in Fund Balances**

Year ended June 30, 2016

<b>Revenue:</b>	<b>2016</b>	<b>2015</b>
<b>Endowment Fund:</b>		
Investment Income (Note)	\$456,624	\$856,734
Donations	368,568	298,740
<b>Total Endowment Fund Revenue</b>	<b>\$825,192</b>	<b>\$1,155,474</b>
<b>Administration:</b>		
Admin Fee - Capital	\$75,439	\$66,646
Admin. Fee - Memorial Walkway	5,000	6,500
Corporate Donations	20,325	18,700
Vital Signs		21,000
<b>Total Administration Revenue</b>	<b>\$100,764</b>	<b>\$112,846</b>
<b>City of Salmon Arm Trust</b>		
Grant Income	\$57,500	\$57,500
Investment Income	133	122
<b>Total City of Salmon Arm Revenue</b>	<b>\$57,633</b>	<b>\$57,622</b>
<b>District of Sicamous Trust</b>		
Grant Income	\$40,000	-
Investment Income Note 1	29	-
<b>Total District of Sicamous Revenue</b>	<b>\$40,029</b>	<b>-</b>
<b>Total Revenue</b>	<b>\$1,023,618</b>	<b>\$1,325,942</b>
<b>Operational Expenses:</b>		
<b>Endowment Fund:</b>		
Administration Fee	\$71,869	\$63,334
Discretionary Manager Fee	37,491	36,227
<b>Total Endowment Fund Expenses</b>	<b>\$109,360</b>	<b>\$99,561</b>
<b>Administration:</b>		
Administration Costs	\$93,111	\$85,626
Admin. Fee - Memorial Walkway	3,628	5,751
Vital Signs Expenses	-	12,335
<b>Total Administration Expenses:</b>	<b>\$96,739</b>	<b>\$103,712</b>
<b>Total Operational Expenses:</b>	<b>\$206,099</b>	<b>\$203,273</b>
<b>Revenue over expenses before Grants</b>	<b>\$817,519</b>	<b>\$1,122,669</b>
<b>Grants:</b>		
Life Insurance Costs	\$3,100	\$2,500
Grants - SCF	318,700	252,187
<b>Total Grants and Insurance Costs - SCF</b>	<b>\$321,800</b>	<b>\$254,687</b>
Grants - City of Salmon Arm (Trust)	58,881	58,833
Grants - District of Sicamous (Trust)	39,000	-
<b>Total Grants and Insurance Costs</b>	<b>\$419,681</b>	<b>\$313,520</b>
<b>Net Revenue</b>	<b>\$397,838</b>	<b>\$809,149</b>
<b>Total Fund Balances July 1,2015</b>	<b>\$7,777,063</b>	<b>\$6,967,914</b>
<b>Total Fund Balances *June 30,2016</b>	<b>\$8,174,901</b>	<b>\$7,777,063</b>

<b>*Note: Fund Balances</b>	<b>2016</b>	<b>2015</b>
SCF Fund Balances July 1,2015	\$7,741,996	\$6,940,770
SCF Fund Balances June 30,2016	8,136,029	7,741,996
SCF Admin Balances July 1,2015	\$32,904	\$23,770
SCF Admin Balances June 30,2016	36,929	32,904
CSA (Trust) Balances July 1,2015	\$2,163	\$3,374
CSA (Trust) Balances June 30,2016	915	2,163
Dist. of Sicamous Balances July 1 ,2015	-	-
Dist. of Sicamous Balances June 30,2016	\$1,029	-

**SHUSWAP LIFEBOAT SOCIETY -  
PROJECT: KIDS DON'T FLOAT  
PROGRAM**



SCF recently granted \$2,336 from our Community Fund to Shuswap Lifeboat Society to aid in the installation of a Kids Don't Float kiosk at Shuswap Lake Provincial Park.

This site has particular interest province-wide as BC Parks Ministry in Victoria have become interested in this program since it does not exist in any other provincial park. Once this kiosk is installed, BC Parks would like to consider it a model for other provincial parks.

The Kids Don't Float Program was initially developed in 1996 by a group in Homer, Alaska as a response to Alaska's high rate of drowning. The program was piloted in Homer and then adapted for statewide use.

**MESSAGE TO OUR  
FUND HOLDERS:**

Thank you for your continued support of Shuswap Community Foundation.

To see your Fund balances please visit our website at [shuswapfoundation.ca](http://shuswapfoundation.ca) or request a copy by email at [info@shuswapfoundation.ca](mailto:info@shuswapfoundation.ca).

# 2016 Permanent Capital Fund

\*Fund values show increase on contributed and retained capital in each fund since its inception.

## Discretionary Funds

Board Discretion (No Limitation to Board Granting Authority)	Contributed capital	Net Retained Earnings	Market Value & Retained Earnings
Albert and Muriel Spencley Endowment	\$ 20,000	\$ 1,045	\$ 21,045
Brooke, Downs, Vennard LLP Endowment	10,000	281	10,281
Brooke, Jackson, Downs Endowment	15,670	4,771	20,441
Catherine and Joseph Shay Memorial Endowment	57,466	20,202	77,668
Chapman Family Endowment	11,526	1,860	13,386
Community Fund	324,554	112,851	437,405
Dave Neale Memorial and Trinity Neale Endowment	11,468	(49)	11,419
David Wood and Jean Bleakley Endowment	10,000	235	10,235
Derkaz/Derby Family Endowment	27,411	13,647	41,058
Don and Irene Rogers Endowment	6,091	258	6,349
Doreen McCaig Memorial Endowment	20,000	745	20,745
Doug and Donna Adams Family Endowment	20,790	8,710	29,500
Dr. Tess Trueman Endowment	2,250	(10)	2,240
Earl and Muriel MacKenzie Family Endowment	11,000	5,638	16,638
Founders	66,572	21,315	87,887
Gordon and Bev Marshall Family Endowment	13,096	8,384	21,480
Gordon Priestman Memorial Endowment	10,000	148	10,148
Harry, Thelma and Patricia May Endowment	6,000	169	6,169
Higgins Family Endowment	31,749	7,105	38,853
Howard Johnston Memorial Endowment	10,000	-	10,000
Ian Duncan and Maureen Stickney Endowment	10,073	(10)	10,063
Lynda Nicholson, Allen Ferguson Endowment	10,000	187	10,187
Marian and Ralph Segreto Endowment	35,058	5,066	40,124
Nina Dickins Family Endowment	14,500	5,503	20,003
Pat and Peter Cummings, George and Eva Kassa, Patti and Bryan Kassa Endowment	16,264	6,006	22,270
Reid/Wright Families Endowment	10,096	742	10,838
Sheldon and Karen Pukas Family Endowment	10,000	(10)	9,990
Tom and Elsie Brighthouse Family Endowment	15,673	7,675	23,348
Ulrich and Margarete Schoene Family Endowment	11,448	157	11,605
<b>Totals</b>	<b>\$ 818,755</b>	<b>\$ 232,619</b>	<b>\$ 1,051,375</b>

**Board Discretion - Donor Preference**  
**(No Limitation to Board Grant Authority**  
**- Donor Preference to be Considered)**

	Contributed capital	Net Retained Earnings	Market Value & Retained Earnings
Browne Johnson Legacy	\$ 56,679	\$ 28,996	\$ 85,675
Enid Finn Memorial	10,153	4,911	15,064
Gerry and Rita Chu Family Endowment	15,240	6,183	21,423
Gertrude and Ludwig Klein Memorial	56,132	23,110	79,242
Lloyd and Dorothy Askew Family Endowment	166,098	82,468	248,566
Margot Hewitt, Dr. Melany Dyer Endowment	17,525	6,956	24,481
Molly Bell Endowment	8,213	2,761	10,974
Paul and Jane Burrows Endowment	30,830	2,985	33,815
Rick and Linda Hirtle Family Endowment	10,423	604	11,027
Rosemarie's Fund	21,443	3,363	24,805
Shuswap Coordinating Training Society Endowment	39,000	20,130	59,130
Tom Pugh Memorial	10,000	596	10,596
Turner Orchards Endowment	14,150	6,905	21,055
Wendy and Rod Charlebois Endowment	8,000	285	8,285
Youth Endowment	10,674	6,136	16,810
<b>Totals</b>	<b>\$ 474,559</b>	<b>\$ 196,390</b>	<b>\$ 670,949</b>



# 2016 Permanent Capital Fund

\*Fund values show increase on contributed and retained capital in each fund since its inception.

## Non Discretionary Funds

Non-Discretionary Funds	Contributed capital	Net Retained Earnings	Market Value
Al Neale Bursary	\$ 114,568	\$ 49,862	\$ 164,430
Beryl Herdan and Al Neale Endowment (Canadian Mental Health Association Shuswap/Revelstoke)	19,649	3,334	22,983
Bill and Mary Douhaniuk Memorial	24,500	12,636	37,136
Bill and Peggy Kernaghan Family Endowment	1,250	615	1,865
Bill MacDonald Memorial	10,894	5,628	16,522
Braby Family Endowment	10,000	579	10,579
Brad Jackson Scholarship	15,814	7,203	23,018
Bruce Hall Memorial Endowment	2,562	179	2,741
Canadian Mental Health Association - Shuswap/Revelstoke Branch	19,384	3,588	22,972
Centennial Reunion Scholarship	5,366	2,914	8,280
Clara Anderson Endowment	4,489	685	5,174
Class '77 - David MacKay Memorial Endowment	8,618	(7)	8,610
David John Stratton Memorial Bursary	10,226	5,350	15,576
Dearing Family Endowment	20,231	1,470	21,701
Dorothy Longdo Memorial	103,197	37,847	141,044
Douglas Burkitt Memorial	11,000	3,214	14,214
Elisabeth Thomi Endowment	984,122	499,078	1,483,199
Eve and Christopher Wright Scholarship	10,998	5,964	16,962
Fowler/Gomme Family Endowment	18,279	9,001	27,281
Frank and Rita Smuin Memorial Bursary	16,100	9,056	25,156
Henderson Award in International Development	49,388	18,796	68,184
Jack and Edith Stead Endowment	39,741	13,068	52,808
Jack and Edith Stead Hospital Endowment	10,365	871	11,236
Janet Pattinson - Shuswap Naturalist Club Bursary	18,712	8,883	27,595
Lisa Rolland Children's Literacy	17,348	5,793	23,141
Lloyd and Joy Johnston Family Endowment	120,069	28,482	148,551
Loyola Elliott Bursary	\$ 7,308	\$ 328	\$ 7,635

<b>Non-Discretionary Funds</b>	<b>Contributed capital</b>	<b>Net Retained Earnings</b>	<b>Market Value</b>
Marie Manson Memorial Art Award	\$ 26,162	\$ 15,454	\$ 41,616
Morris Bursary Fund for Excellence in Mathematics	40,745	12,770	53,514
Nayki/Greer Family Endowment	71,972	27,131	99,103
Nick and Marilyn Brown Family	21,153	7,776	28,929
Ready Family Endowment	26,991	12,170	39,160
Salmon Arm Kinsmen and Kinette Scholarship	32,877	20,531	53,408
Salmon Arm Secondary Athletic Endowment	25,683	11,957	37,639
Shane Gorner Memorial Endowment	18,695	1,771	20,466
Shuswap Branch, B.C.S.P.C.A. Endowment	69,245	27,187	96,431
Shuswap Volunteer Firemen's Association –	11,941	6,074	18,015
Steve Heal Memorial Scholarship	12,157	6,339	18,496
Susan Latimer Bursary	1,140	59	1,199
Tom Brush Memorial Scholarship	11,692	5,921	17,613
Tomas Idzan Memorial Bursary	10,475	5,493	15,968
Walter Ellaschuk Memorial Bursary	25,100	13,572	38,672
Wayne Williamson Memorial	4,072	2,629	6,701
<b>Total</b>	<b>\$ 2,084,274</b>	<b>\$ 911,249</b>	<b>\$ 2,995,523</b>



# 2016 Permanent Capital Fund

\*Fund values show increase on contributed and retained

## Non Discretionary Funds

<b>Board Discretion - Donor Limitations (Discretion Limited to Field of Interest and/or Geographic Location)</b>	<b>Contributed capital</b>	<b>Net Retained Earnings</b>	<b>Market Value</b>
Aileen Gentles Memorial Endowment	\$ 11,828	\$ 574	\$ 12,403
Anonymous Eagle Valley Seniors Endowment	10,000	4,184	14,184
Bill and Mary Douhaniuk Endowment	45,500	23,355	68,855
Bob and Marlene Robertson Family Endowment	7,137	594	7,731
C. Norman Barber Endowment	45,000	24,368	69,368
Eagle Valley Communities Endowment	8,259	3,490	11,749
Edna and Dan MacQuarrie Family Endowment	14,686	3,003	17,689
Ev Painter Endowment	19,493	9,110	28,602
Garry Locke Memorial	5,567	1,419	6,986
Geoff and Judith Benson Family Endowment	160,171	80,770	240,942
Ian and Wendy Clay Endowment	6,513	193	6,706
Jennifer Phillips Memorial	53,804	27,001	80,804
Joe and Bobbi Johnson Schools Legacy	16,351	7,928	24,279
John and Ingrid Monk Endowment	85,080	38,163	123,243
Kyllo Family Endowment	10,000	480	10,480
Landers Family Legacy	7,806	1,947	9,753
Letham Family Endowment	11,449	3,935	15,383
Maureen Brass Memorial	2,347	607	2,954
Maurice Gillis Memorial Endowment	11,000	763	11,763
Memorial Walkway	44,099	6,470	50,569
Mickey Petersen Endowment	1,104	255	1,359
Paul and Elvi Pukas Family Endowment	35,000	15,229	50,229
Potter/Edgell Family Endowment	25,499	10,832	36,331
Robin Jackson Environmental Endowment	14,358	7,264	21,623
Rod Bailey Endowment	12,000	5,327	17,327
Salmon Arm Savings and Credit Union Community Endowment	80,705	30,283	110,988
Salmon Arm Savings and Credit Union Youth Endowment	13,000	7,515	20,515
Seniors Project	20,419	12,594	33,013
Sorrento Lions Club - Catherine Dilworth Memorial Endowment	75,451	38,126	113,577
Steve Guidone and Jaki Greenhough Endowment	1,000	(4)	996
Wainwright-Mobley Memorial	146,347	68,606	214,952
<b>Totals</b>	<b>\$ 1,000,972</b>	<b>\$ 434,380</b>	<b>\$ 1,435,352</b>

<b>Agency Funds</b>	<b>Contributed capital</b>	<b>Net Retained Earnings</b>	<b>Market Value</b>
Administration Endowment	\$ 57,787	\$ 28,633	\$ 86,420
Anglican Parish of Salmon Arm - Sicamous Endowment	23,017	7,014	30,031
City of Salmon Arm Endowment	158,911	58,516	217,427
Seniors Resource Centre - Fletcher Park Endowment	22,210	2,734	24,943
North Okanagan-Shuswap School District Endowment	53,835	29,656	83,491
Okanagan College	100,000	56,249	156,249
Okanagan Regional Library (Shuswap) Endowment	5,000	132	5,132
Royal Canadian Air Cadet 222 Shuswap Squadron Endowment	2,807	181	2,988
SABNES Endowment	13,370	1,336	14,706
Safe Society Endowment	10,310	4,912	15,222
Salmon Arm College Scholarship Trust - George and Nancy Clark	77,340	43,618	120,958
Salmon Arm College Scholarship Trust - Len O'Neill Memorial	69,366	35,182	104,548
Salmon Arm College Scholarship Trust - Vicki Hitchen Memorial	60,764	32,283	93,047
Salmon Arm Museum and Heritage Association -	53,887	24,748	78,635
Salmon Arm Museum and Heritage Association Endowment	121,516	60,787	182,303
Shuswap Art Gallery Association Endowment	308,696	158,387	467,083
Shuswap District Arts Council Endowment	40,569	19,098	59,667
Shuswap District Arts Council Endowment - Blair Borden Memorial	25,254	13,502	38,756
Shuswap District Arts Council Endowment -T.O.N.A.C.	5,026	3,176	8,202
Shuswap Hospice Society Endowment	31,448	16,425	47,873
Shuswap Hospital Foundation Endowment	28,412	8,159	36,571
Shuswap Hut and Trail Alliance Society Endowment	4,317	1,668	5,985
Shuswap Theatre Society Endowment	22,630	1,008	23,638
Sorrento and Area Community Health Centre	14,100	210	14,310
<b>Totals</b>	<b>\$ 1,310,572</b>	<b>\$ 607,614</b>	<b>\$ 1,918,186</b>

# 2015/2016 Foundation Donors

- ◆ Agassiz, Angel
- ◆ Alstad, Dawn and Tim
- ◆ Anderson, Clara
- ◆ Anonymous (3)
- ◆ Benson, Patrick and Dawn
- ◆ Booth, Donna and David
- ◆ Brear, Caroline
- ◆ Brodsky, Ann
- ◆ Brooke, Gary and Sunni
- ◆ Brown, Marilyn
- ◆ Brown, Paulette
- ◆ Buker, Kim
- ◆ Burkitt, Laura
- ◆ Burt, Hetty
- ◆ Campbell, Robert
- ◆ Charlebois, Roderick and Wendy
- ◆ Chu, Gerry and Rita
- ◆ Clay, Ian and Wendy
- ◆ Dearing, Nadina
- ◆ Dickins, Nina
- ◆ Duerichen, Sharon
- ◆ Dukeshire, Kari and Weare, Bernie
- ◆ Dyer, Melany
- ◆ Edgell, David and Caroline
- ◆ Estate of Albert Spencley
- ◆ Estate of Anne Hlina
- ◆ Estate of Doreen McCaig
- ◆ Fawcett, Faye
- ◆ Fowler, Malcolm
- ◆ Geier, Shelley
- ◆ Gillick, Catherine
- ◆ Graham, Alli
- ◆ Graham, Ethel
- ◆ Grainger, Ed
- ◆ Grave, John and Turner, Janice
- ◆ Guidone, Steve and Greenhough, Jacalyn
- ◆ Hanna, Janet and John
- ◆ Heal, Sandra
- ◆ Helmcken, Douglas and Tannis
- ◆ Henderson, John and Joyce
- ◆ Henrie, Matthew
- ◆ Heschuk, Cal and Sandra
- ◆ Huppler, Amy
- ◆ Johanson, Glenn and Gibson, Margaret
- ◆ Johnson, Joseph and Bobbi
- ◆ Johnson, Dale
- ◆ Klein, Gabriele
- ◆ Kolkind, Thomas and Adeline
- ◆ Landers, Garry and Mary
- ◆ Lawrence, Eleanor
- ◆ Leatherdale, Doug and Joanne
- ◆ Lensen, Blayne
- ◆ Letham, Chris and Tina
- ◆ Levy, Stanley
- ◆ Lindberg, Eldene
- ◆ Linkletter, Judy
- ◆ Little, Gary and Gerry
- ◆ MacAulay, Marjorie
- ◆ MacDonald, Charles and Joyce
- ◆ MacKay, Douglas and Hanne
- ◆ MacQuarrie, Dan
- ◆ May, Patricia
- ◆ Mayes, Daron
- ◆ MacKay, Doug and Hanne
- ◆ McAndrew, Carol Elizabeth
- ◆ McAuley, Dale and Devora
- ◆ Mearns, Patricia
- ◆ Metcalfe, Selina
- ◆ Miege, Kathleen
- ◆ Minor, Carol
- ◆ Morris, Robert L.
- ◆ Morris, Vanessa
- ◆ Morris, Vivian
- ◆ Munholland, Allan and Patricia
- ◆ Murdoch, Frank and Liz
- ◆ Nau, Judy
- ◆ Neale, Al
- ◆ Nicholson, Lynda and Ferguson, Allen
- ◆ Painter, Evelyn
- ◆ Pattinson, Janet
- ◆ Peel, Blake and Beverly
- ◆ Phillips, William and Alice
- ◆ Potter, Frank and Andrian
- ◆ Powell, Thomas
- ◆ Pringle, William
- ◆ Rabie, Anna
- ◆ Ready, Regan
- ◆ Ream, Robert
- ◆ Roberge, Shannon
- ◆ Robertson, Jean
- ◆ Robertson, Robert and Marlene
- ◆ Rogers, Irene
- ◆ Rollier, Donna and Brian
- ◆ Sansom, John and Irene
- ◆ Saul, Mike and Pam
- ◆ Say, Anthony and Vivien
- ◆ Schoendorfer, Mary
- ◆ Schoene, Ulrich and Margarete
- ◆ Smith, Mike
- ◆ Snell, Lorna
- ◆ Stead, Jack and Edith
- ◆ Stickney, Maureen
- ◆ Teare, Cindy
- ◆ Titus, Donald and Dorothy
- ◆ Tolley, Coralie
- ◆ Tremblay, Martin
- ◆ Vennard, Kathryn
- ◆ Vennard, Margaret
- ◆ Vetter, Chelsea
- ◆ Watson, Stephanie
- ◆ Whitehead, Lil
- ◆ Williamson, Jean
- ◆ Wilson, John and Leslie
- ◆ Wilson, Lynda and Lorne
- ◆ Bell Canada
- ◆ Brooke Downs Vennard LLP
- ◆ Browne Johnson Land Surveyors
- ◆ City of Salmon Arm
- ◆ DEO Lutheran Church
- ◆ Dinoflex Group Limited
- ◆ Partnership
- ◆ Faster Than Light Computing Inc.
- ◆ Gift Funds Canada
- ◆ Mawer Investment Management
- ◆ Okanagan Regional Library HQ
- ◆ Order of the Royal Purple #279
- ◆ SASCU
- ◆ Shuswap Film Society
- ◆ Shuswap Middle School
- ◆ Shuswap Naturalists Club
- ◆ Sorrento and Community Health Centre Society
- ◆ St. John Anglican Church
- ◆ TD Canada Trust
- ◆ Tech-Crete Processors Ltd.
- ◆ United Way of the Lower
- ◆ Mainland
- ◆ Vancouver Foundation

With the Ongoing Support of Our Corporate Sponsors

# GOLD



# SILVER

downtown  
**SALMON ARM**

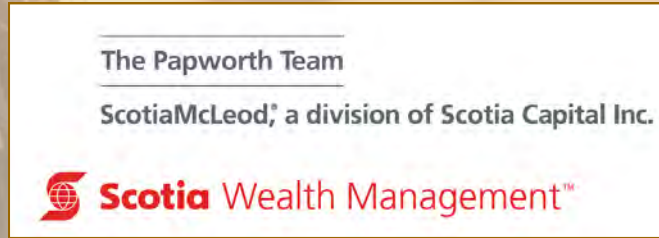


## ARTS COUNCIL FOR THE SOUTH SHUSWAP PROJECT: 2016 CHILDREN'S THEATRE PRODUCTION & FESTIVAL

In 2015, the Arts Council for the South Shuswap received a grant of \$3,600 to revitalize the Shuswap Festival of the Arts, a four day festival inclusive of all art forms. This grant also aided in the creation of a series of extensive visual arts, dance and theatre camps for youth. These camps ran this past summer and were enjoyed by residents of the Shuswap as well as tourists visiting the area. This grant was made possible by the SCF Community Fund.



# Platinum



Al Neale, SCF Fund holder

## A quote from Al Neale's speech at the Okanagan Colleges Award Ceremony

*"I'm reminded of the bricklayers helper who bragged to his buddies about the great job he had. "All I do is just keep bringing more bricks and mortar to the bricklayer, and he does all the work!" Similarly the Shuswap Community Foundation The Okanagan college and Lynda Wilson nurtured the Al Neale Bursary through its infancy and early years while the Shuswap Community Foundation took care of all the legal proceedings, Deed of gift, all the paperwork, managing, accounting, investing, compiling an annual reports, you name it. Without them, none of this would have happened.*

*Just like the bricklayers - they did all the work!"*

-Al Neale

To learn more about these initiatives, please visit [www.shuswapfoundation.ca](http://www.shuswapfoundation.ca), ask a director, or call the Foundation office 250-832-5428



SHUSWAP  
**COMMUNITY**  
FOUNDATION

Box 624, 450 Lakeshore Drive  
Salmon Arm, BC V1E 4N7  
Phone: 250-832-5428  
Email: [info@shuswapfoundation.ca](mailto:info@shuswapfoundation.ca)  
Web: [www.shuswapfoundation.ca](http://www.shuswapfoundation.ca)

