



— CENTRAL OKANAGAN —
FOUNDATION

empowering generations to give.

Welcome Message 01
 How to Give 02
 Donor Story: Dick and Jean Hall 03
 How to Receive 04
 Granting Story: Inn from the Cold 05
 Granting Story: The Bridge Youth & Family Services 06
 Lifetime Achievement: The Lionel Wace Story 07
 Granting Story: Lake Country Open Air Performances 08
 In Memory of Janson Towers 09
 In Memory of Andrew Scott Walker 10
 Granting Story: The Clubhouse 11
 Professional Advisors 12
 Granting Story: Elizabeth Fry Society New Beginnings 13
 Learning Together 14



Leanne Hammond Komori
Executive Director



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Board Chair

The Central Okanagan Foundation welcomes you to find out more about how we contribute to the vitality of our community, and through us, how you can too!

Community vitality is the unique spirit that flourishes when people believe their community holds possibilities for everyone. It's put into action by people coming together, getting involved in community issues, and providing philanthropic support for causes and organizations. It can be measured by how well people's needs are being met; from our most basic needs – sustenance, shelter, health care, safety – to those needs that give quality to life, such as places and opportunities to play, learn and create.

The Central Okanagan Foundation does three key things to build community vitality:

ENDOWMENT BUILDING AND PERSONALIZED SERVICE

Vitality takes long-term resources for long-term solutions, so we work with donors to build endowment funds that ensure a vital future for our community and beyond.

LOCAL GRANT MAKING EXPERTISE

Vitality comes from all corners of the community, so we grant funds to the widest possible range of organizations and initiatives.

COMMUNITY LEADERSHIP

We bring donors and others to the table as community builders. We help donors formulate and realize their goals, matching their interests and concerns with community needs and organizations, and finding innovative and responsible ways to give their investments lasting impact.

We take the broadest view of what our community is and what it needs to succeed; this is why our grants support everything from shelter, sustenance and care for those most in need, to recreation, the arts, and the environment.

We take the long-term view for our community; we identify long-term needs and opportunities and invest in sustainable solutions, helping our community become more resilient, resourceful, and ready for the future we want.

The Central Okanagan Foundation has proudly been making a difference in our community since 1977. The vision of our Founders to leave our community even better than we found it continues to guide us. Community Foundations don't just talk sustainability – we live it.

Anyone can leave a legacy. It's easier than you think.

The Central Okanagan Foundation is about making the donor experience meaningful, personal and most of all easy. We offer a variety of gifting options to suit your needs.

PLEDGE FUND (minimum \$2000)

Allows for a named fund to be created for any charitable purpose with a minimum \$2000 contribution. Pledge Funds offer the flexibility to add to the fund over time while the fund reaches its desired goal. Pledge funds can be started for most of the fund types listed below:

COMMUNITY FUND DONATION

(no gift too small)

Our "Community Fund" is a general fund that combines gifts of various sizes from individuals and groups. The income on this fund is distributed through the grant application process. Community Funds ensure that future generations can make a difference to our community relevant to changing community needs.

NAMED DESIGNATED FUND

(minimum \$10,000)

A designated fund allows you to benefit a charity of your choice. Each year the income from your endowment fund is dedicated to that charitable organization exclusively. The fund can be named after your family, your business, or the charity itself. (This fund can be started with \$2000 and a pledge to contribute \$2000 each year for 5 years until the fund reaches \$10,000)

FIELD OF INTEREST FUND

(minimum \$10,000)

This type of fund allows you to direct the income from your fund more broadly to cover a particular area of interest rather than any specific organization; e.g. arts, youth, health, education, etc. (This fund can be started with \$2000 and a pledge to contribute \$2000 each year for 5 years until the fund reaches \$10,000)

DONOR ADVISED FUND

(minimum \$50,000)

The most flexible of funds, Donor Advised Fund income can be re-directed to different charitable causes each year. This fund provides donors with the same benefits as a Private Foundation without the administrative costs or onerous reporting responsibilities. Donor Advised Funds also allow for succession planning if you would like to pass the legacy of giving along to your children. Donors always have the option of having us take on this responsibility instead of naming a successor. (This fund can be started with \$10,000 and a pledge to contribute \$10,000 each year for 5 years until the fund reaches \$50,000.)

The Central Okanagan Foundation introduces the **ONE FOR 10 & 10 FOR ALL** fund. This fund is geared to those of us who want to get involved in philanthropy in a more gradual way. This fund allows donors to start a named fund with \$1000 and a pledge to give \$1000 per year until the fund reaches \$10,000. Income from this fund goes to the Community Granting cycle where our volunteer committees consider a broad range of applications from groups seeking funding for valuable projects in our community. Call us at (250) 861-6160 for more details!



Dick was born at home in the Okanagan Mission in April of 1916. Perhaps it was being born in the Spring that gave Dick his life-long passion for gar-

dening; or perhaps it was Jean's appreciation of gladiolus that led him to it. When Dick met Jean, a nurse at Kelowna General Hospital he was smitten.

Dick and Jean were married in 1953 and shared a lifetime of travelling, entertaining and making wonderful memories. While they travelled extensively enjoying the theatre in England, viewing ancient and priceless museum artifacts in Bagdad in 1985, and soaking in the art and culture of Europe in 1994; they always returned home happily to their favourite community, Kelowna.

Old Kelowna families will remember the Hall's store at the base of Lakeshore hill, and will remember Dick and Jean's love of their neighbourhood and appreciation for the various not-for-profit groups that contribute to the diversity and health of our community.

After 48 happy years together, Dick passed away in 2001 of cancer. Jean enjoyed life for many years after surrounded by the remnants of Dick's garden and friends from their lifetime together.

Jean passed away in September 2009. The couple's appreciation of the arts, education, health, faith, and love of animals will continue on with the income from their memorial fund supporting their favourite charities through the COF in perpetuity. Dick and Jean also made a substantial gift to the COF Community Fund to ensure our granting committees are able to make grants responsive to ever changing future community needs.

Celebrating our generous donors.
Thanks to the generosity of long time Okanagan Mission residents Dick and Jean Hall our community will forever benefit from the Dick and Jean Hall Fund.

Applying for a COF Community Grant. The Central Okanagan Foundation accepts Grant Applications from a wide range of community based charities.

We utilize the expertise of volunteer grants committee members to help us decide which projects will receive funding each year. Funding for the Community Granting cycles comes from pooling charitable gifts – both large and small – from many donors. The Central Okanagan Foundation’s “Community Fund” creates a renewable source of income that will benefit the community in perpetuity. Since 1977, the COF has helped distribute over \$3.5 million to a wide range of valuable charitable causes and projects.

FIELDS OF INTEREST

The Central Okanagan Foundation has chosen 8 fields of interest for our “Community Granting Program”. The COF considers grants for charitable organizations that fall into the following categories:

Arts & Culture • Children, Youth & Family • Health & Community Service • Education • Heritage & Historical • Animal Welfare • Environment • Global Initiatives

HOW TO APPLY

Read the grant guidelines and determine if your project qualifies. Call the COF Grants Manager to ensure that your idea fits with our granting guidelines and that you are eligible to apply. Our Grants Manager will guide you in the process and advise you of our deadlines.

If your grant application is successful you will be required to submit a final evaluation within 12 months.

For more information about our Grants Programs, please visit our website at www.CentralOkanagan-Foundation.org.

Related Granting Programs

STUDENT SUPPORT

Central Okanagan Bursary and Scholarship Society (COBSS)

COF partners with COBSS to support students going on to post-secondary education by providing access to opportunities through bursaries, scholarships and awards. COBSS is a volunteer organization that provides an invaluable coordination role in making students aware of funding opportunities, as well as selecting suitable students for the awards.

In addition to our program with COBSS, COF has also created multiple bursaries and scholarships with donors in direct cooperation with UBC Okanagan, UBC Vancouver, Okanagan College and other accredited educational institutions.

City of Kelowna

Granting Programs:

The COF administers 3 granting programs on behalf of the City of Kelowna:

Community Social Development Grants

Available to non-profit organizations and community organizations offering social programs in the municipality of Kelowna.

Emergency Grants

Available to non-profit and community organizations offering social programs in the City of Kelowna for the purpose of assisting an organization through a financial crisis.

Grants to Address the Sexual Exploitation of Youth

Made available to organizations whose programs are working to eliminate the sexual exploitation of youth in Kelowna.

The COF also works closely with other groups to assist them with their granting programs. Consider whether your service group, business, giving circle, or Private Foundation might benefit from the specialized skills of our granting staff and volunteer committees. Together... we build community.



INN FROM THE COLD

The chill of the early morning is a clear sign of the change of season. Suddenly the importance of our winter shelter is clear again.

Last year, at this time, we had nearly completed our first bout of renovations. Our on-line application for volunteering and the e-ability to sign up for shifts was efficient and easy to use. Over the winter – 121 consecutive nights – we provided 3,388 overnight stays for people without homes. Spring brought another unavoidable spate of renos to satisfy the B.C. building code with regard to fire safety. Withal, the consensus of volunteers, staff, visitors and guests was that the move to our own permanent space was a huge advantage.

We enter the 2009-2010 season with the firm resolve to continue supporting our guests with compassion and respect and to grapple with the growing need year-round to support persons at risk of being homeless and adrift.

We appreciate the support the Central Okanagan Foundation has provided over the years and look forward to continuing our work together into the future.

Grants Support Community Growth



The Bridge Youth & Family Services builds stronger families and healthy children. Enhancing life skills for youth is critical for a successful transition to adulthood, and parenting workshops invest in education and support where it is most valuable.

THE BRIDGE YOUTH & FAMILY SERVICES

The Bridge is all about helping children and youth become healthy adults. One of the best ways we have found to achieve this is to support parents. In 2009, the Central Okanagan Foundation provided a generous grant to support parent education programs. These funds allow over 100 parents and caregivers to benefit from parenting workshops, through providing subsidies, course materials, healthy snacks, on-site child care and transportation assistance, as required.

The Bridge is actively involved in building stronger families and healthy children. Timely counselling and parent education provides support and community connections for families that may find themselves needing further resources to fully meet the needs of their children. Enhancing life skills for youth is critical for a successful transition to adulthood and residential care is designed to build confidence and capacity within our young people.

A grant to The Bridge Youth & Family Services is an investment, an investment in our children, our families and our community. The World Health Organization has found that for every \$1 invested in child and parent programming there is \$7 saved in reduced remedial, education, health care, social assistance and criminal system costs. Your contribution is an immense benefit to many children and families, thank you.



◀ THE LIONEL WACE STORY

Over 30 years ago, Lionel Wace had an idea. His idea turned into a dream, a passion, and huge part of his life's work.

Lionel wanted to set up a Community Foundation in the Central Okanagan... and Lionel succeeded. With the help of Frank Williams, Ish Holmes and a cast of characters that have come to be known as the COF "Founders" our Foundation was born.

As supervisor for the Ministry of Social Services in our area at the time, Lionel recognized the inherent risk of depending on government money to solve community issues. As Lionel explained, too much dependence on government is not only negative for the people, but regressive for the community. Lionel envisioned a freedom... a flexible, responsive, personal structure where donors could make a difference in the community they call home. As usual, Lionel was right.

As we celebrate Lionel's 85th birthday, it is fitting to recognize the breadth of accomplishments that bear his mark. From the establishment of the COF, to creating the first Foster Parents' Association, to championing the Abbeyfield House movement for seniors housing, Lionel's has been a tireless champion of the strength of the charitable sector. He has taught us all to look within for help and to empower ourselves and each other to make the change we want to see in the world.

Lionel's passion for and excitement about the community foundation movement is as strong today as it was over 30 years ago. As Lionel always says, "Anyone can leave a legacy".

Building the Central Okanagan Foundation is a part of Lionel Wace's legacy for our community and an inspiration to us all. Happy Birthday Lionel!



The Lake Country Open Air Performance Society provides free outdoor music concerts for the residents and visitors to Lake Country each year during the summer months of July and August.

The Lake Country Open Air Performance Society (LCOAPS) is a not-for-profit initiative created and organized by volunteers in the community of Lake Country. The Society was co-founded by Amber Hugo and Grant Lawrence in 2007.

The Lake Country Open Air Performance Society provides free outdoor music concerts for the residents of and visitors to Lake Country each year during the months of July and August. Each concert features a variety of talented local musicians in a variety of genres, as well as artisans and vendors. We strive to offer musical performances that appeal to the widest audience to encourage the community to come out and meet their neighbours. We also promote the concert series outside of Lake Country to encourage tourist visits.

Our second season, the 2009 concert series featured 29 performers with approximately 1,250 people in attendance. We added two new venues bringing total outdoor venues to 5. We estimate over 1,200 hours of volunteer time, from the Society's board and community at large were gladly given to run this seasons concerts.

None of the achievements these past two seasons would have been possible without the generous support of the Central Okanagan Foundation! Thank you.



Did you know?

The Central Okanagan Foundation granted to Lake Country Open Air Performances to help cover the costs of eight outdoor free summer concerts featuring local musicians and performers. COF has also granted to Festivals Kelowna for the Parks Alive Summer Concert Series as well as the Peachland Community Arts Council Society to help with the costs of hosting the Ogoopogo Arts Festival.

Janson used to carry bits of paper around – words that meant something to him. He read and reread them to help him stay focused. “To give anything less than your best is to sacrifice the gift” comes from the most worn out one.

The phrase has become synonymous with unswerving determination to succeed in the face of seemingly insurmountable difficulties. To understand why, you’d have to appreciate what an inspiration he was.

AGAINST ALL ODDS

On August 11, 2007, during the last quarter of the Okanagan Sun’s game against the Vancouver Trojans, running back Janson Towers got hit, severely injuring his knee. The general medical opinion was that he’d never walk without a limp again, let alone play football.

Instead of believing that, he chose instead, to believe in himself, embarking on a year long journey of surgeries, daily physio, and twice-daily gym workouts. His determination impressed everyone – doctors, therapists, coaches, teammates, friends and family. His success simply amazed them. No one, except Janson himself, ever believed he’d fully recover.

He never, ever gave up. He had a dream, a talent, and his faith was utterly unshakable.

413 days after his injury, Janson resumed his position as running back in the September 28, 2008 game versus the very same Trojans. It was a personal victory, followed shortly after by a very public victory. At the 2008 Okanagan Sun Team banquet, Janson was presented with The Marty Cullen Award for Most Inspirational Player.

Tragically, Three days later, he died in a motorcycle accident.

NEVER GIVE UP... JANSON’S SPIRIT LIVES ON

The **Janson Towers Gift Fund** has been created at the Central Okanagan Foundation to help injured Okanagan Sun players get back on the field. It provides assistance to help cover rehabilitation expenses to return an injured player to the roster.

This fund is Janson’s legacy. It gives something back to the team and the sport that meant so much to him.



**EXCERPTS FROM A LETTER
WRITTEN BY SCOTT WALKER,
FATHER OF ANDREW SCOTT WALKER.**

On July 2, 2009 our lives
changed forever.

It started with a visit
from the RCMP. When
they asked if I was
Andrew Walker's father,
I thought 'okay, what
has he done? Speeding?'
But when they suggested
we sit down you suddenly
realize...

You expect to hear
about a horrible traffic
accident and that he has
been seriously hurt.

You do not expect to
hear he was hanging on
to the side of a car long
boarding and that he
has lost his life.



Over the painful days and weeks that followed reality sunk in for the Walker family that their beloved Andrew was gone. Andrew Walker, son of Scott and Cynthia Walker, brother of Kerry and Benjamin, grandson of Richard & Rosemary Stewart and John & Pat Walker... cherished nephew, cousin, and friend of so many was gone.

Andrew was an adventurous, athletic, intelligent, independent young man. It is his family's greatest hope that Andrew's passing not be in vain. The Walker and Stewart families have established the **Andrew Scott Walker Memorial Fund** in memory of Andrew and his adventurous spirit. The fund is dedicated to helping youth from the Okanagan Valley; monies raised will be utilized here in the Okanagan for the benefit of our young people, our future.

The tragedy of Andrew's death was preventable. It was a risk that took his life. Life is full of risks, and life would not be full without risk. Join us in thinking through the multitude of ways we have all taken risks. Join us in bringing the SMARTRISK program to School District No.23. Join us in supporting programs and services that increase communication for young people. Help us foster a sense of adventure that balances the spirit of risk with the relative precariousness and fragility of life.

To make a donation please go to www.CentralOkanagan-Foundation.org and click on Donate Now. Or contact the COF at 250.861.6160.

In loving memory of Andrew Scott Walker.

How the Foundation is helping...

The Central Okanagan Foundation is accepting donations to the **Andrew Scott Walker Fund** to help bring the SmartRisk program to School District No.23. Our hope is that youth learn that while taking risks is an important part of life, there are ways to take a "smart risk"... save lives, prevent injury... but never give up on adventure. For more on the SmartRisk philosophy go to www.smartrisk.ca.



The Clubhouse Childcare Center is a non-profit registered charity that has been providing a variety of childcare programs to families in the Central Kelowna area for the last fourteen years. The Clubhouse programs provide infant care, group daycare, preschool, school-age care and emergency care for the Neonatal intensive care unit at Kelowna General Hospital. The Clubhouse works with other community partners to provide these services for

children and families.

The Clubhouse provides transportation to children to and from school and on community field trips. Thanks to the generous donation from the Central Okanagan Foundation, B.C. Council for Families and individual donations we were able to purchase a new 28 passenger bus. Our new bus will provide safe, reliable transportation to over 250 children in eight childcare programs year-round.

We rely on the generosity and support of organizations such as the Central Okanagan Foundation to help us enhance the quality of services provided to children and families.

Helping You & Your Clients with Charitable Giving.

With 84% of Canadians contributing to charity on an annual basis*, charitable giving is becoming an increasingly important part of a client's overall financial plan.

Add charitable planning to your practice - or enhance what you already do – with practical online tools and resources designed for you and your clients.

With over 30 years in our local community and the strength of over 80 years of foundation experience across the country, community foundations can help you build a stronger relationship with your client and make a difference in your community at the same time.

WHY SHOULD YOU DISCUSS PHILANTHROPY WITH YOUR CLIENTS?

"It's good for society, it's good for your community, it's good for your clients, it's good for your business, and it's good for you.

Many of your clients are searching for an effective way to give back to their community, to memorialize a loved one and/or simply 'do good'. You can help them achieve these results, and derive personal satisfaction from doing so."

Community Foundations of Canada has created **Professional Advisors eResource**; to provide professionals with advice and resources about charitable giving.

This site provides an overview of the variety of gift types that can be used by professional advisors to achieve that objective. A relationship with your local community foundation, the Central Okanagan Foundation, can provide additional support as we can share our knowledge and expertise.

To access the **Professional Advisors eResource** go to www.CentralOkanagan-Foundation.org.

Six Gift Options for Donors:

The Central Okanagan Foundation is able to handle the following gift types:

- Cash
- Life Insurance
- Appreciated securities
- Real Estate
- Bequests
- Charitable Remainder Trusts



(*Research conducted by The Philanthropic Initiative)

The Sexual Assault
Counselling Centre at
the Elizabeth Fry
Society provides
a safe place for
children, teens,
women and men
to reclaim their
personal strength
and dignity.

**ELIZABETH FRY SOCIETY'S
NEW BEGINNINGS PROGRAM**

We believe that when women join together to benefit one another the effect can be awe inspiring! The Beginnings Program at the Elizabeth Fry Society offers an innovative 26 week course that combines education, cognitive skills, expressive art therapy, yoga, and friendship to help women restore safety, dignity, and wholeness after experiencing sexual assault or abuse.

Each woman's journey to finding strength and wellbeing is as unique as the life experiences that bring her to us. Recognizing that one is not alone has a tremendous impact instills hope for the future.

Funding from the Central Okanagan Foundation for the Beginnings Program demonstrates that these women are fully supported by their community in their recovery. The Foundation's contribution to the Elizabeth Fry Society's Sexual Assault Counselling Centre strengthens our community by fostering personal stability, understanding, improved quality of life, strengthened bonds within families, and security for future generations.



EDUCATION EXPRESS

In our continued effort to support the not-for-profit sector, the Central Okanagan Foundation engaged in Community Conversations and asked the sector what would be helpful in going beyond cheque book mentality.

The message was loud and clear... professional development opportunities and education came out clearly on top. Rather than re-invent the wheel we decided to take a page from our own advice book. Being strong believers in the power of partnering, we approached United Way, the City of Kelowna and Kelowna Community Resources to resurrect a workshop series that had fallen by the wayside. Using a blend of local and out-of-town experts, we hope to draw on the existing experience within the sector to strengthen our knowledge.

We are happy to report that the not-for-profit sector has enthusiastically embraced this initiative and workshops delivered to date include:

- Reporting for Revenue Canada
- Writing Your Case for Support
- Grant Writing Like a Pro
- Leading The Board From Behind

Stay tuned for many more topics to come in this valuable workshop series.



VITAL SIGNS

Fall 2009 marked the launch of Central Okanagan's first **Vital Signs** report. Taking the pulse of our local community's **Vital Signs** is the community foundation way of telling it like it is. Compiled from verifiable research, the report highlights areas of success as well as concern. The report also integrates a survey open to those who want to share their view of what the priorities for our area should be. The point of **Vital Signs** is to share our knowledge with all those who care about our community. It's not how we celebrate our success but how we face our challenges that truly reflects the soul of our region.

Vital Signs increases the effectiveness of our grant making through identifying key issues and priorities. **Vital Signs** helps us to better inform our donors about compelling funding opportunities requiring philanthropic support. Join us as we work through the findings of **Vital Signs** and start down the path of making active change in our community... together.

How you can help...

Pick up a copy of our **Vital Signs** Report and become aware of the issue areas in our community.

Check out the expanded online report with full sources at www.CentralOkanaganFoundation.org

How the Foundation is helping...

The Central Okanagan Foundation has joined the national **Vital Signs** program. **Vital Signs** takes the pulse of our local community and offers findings as a starting point for dialogue, policy recommendation, and change. Being a catalyst for change, convening diverse voices, and shining a light on issues is part of the community foundation role.



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WITH THANKS

At the Central Okanagan Foundation we recognize that we would not be able to do what we do without the valuable support of our tireless volunteers who comprise our Granting, Finance, Investment, Communications, Organizational Development and Planned Giving Committees and the dedicated members of our Board – we thank you.

For a list of our committee members please see
www.CentralOkanaganFoundation.org


— CENTRAL OKANAGAN —
FOUNDATION
empowering generations to give.

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As a member in good standing of Community Foundations of Canada, the COF shares a commitment to demonstrating philanthropy as a powerful catalyst for strengthening communities.