



Empowering Generations to Give



– November 22, 1978 –

Charitable foundation established for region - \$40,000 in seed money

■ CENTRAL
■ ■ OKANAGAN
■ ■ ■ FOUNDATION



*“When you go camping,
leave the woodpile bigger
than when you arrived.
When you leave this
world, be sure you leave
something more than
what you brought into it.”*

R. J. Bennett

Founding Member & Past President

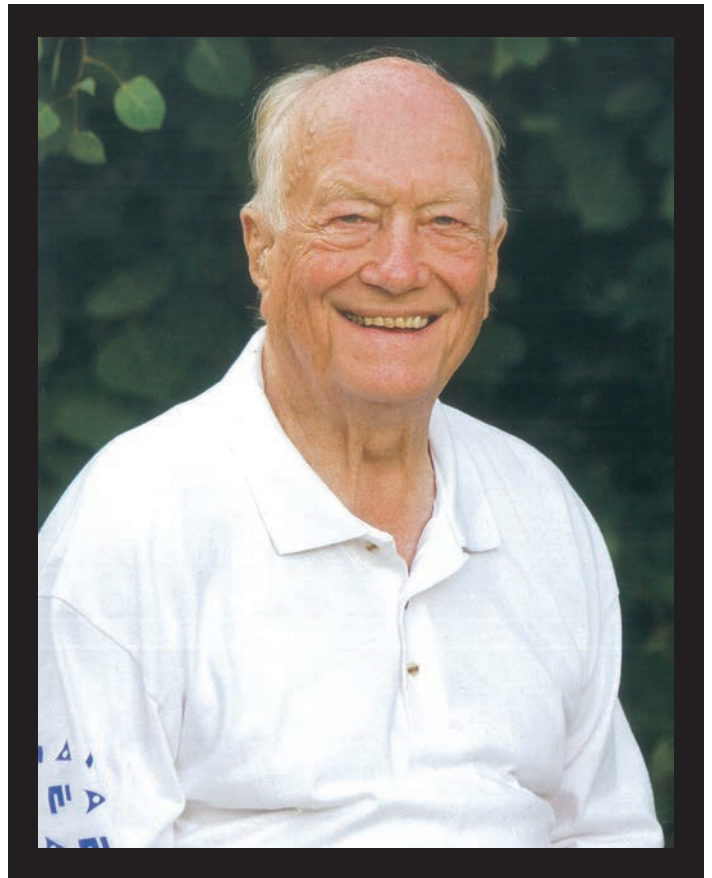
The Founders

The Hon. W.A.C. Bennett and Family
The Capozzi Family
Carruthers Family and Meikle Family
Ephriam Arthur Day Family
Kelowna General Hospital Society
D. G. McConachie Family
M. Jake Peters
West Sunnyside Lands Ltd.

Aubrey Roy Pollard Family
Camillo Rampone Family
Jack & Helen Serwa Family
S. M. Simpson Family
J. Bruce & Ann G. Smith
Richard John Stewart Family
James H. Bannister &
Madge Bannister Walden

The Visionary: *Lionel Wace*

The original vision for a community foundation was proposed by Lionel Wace who in the late 1960s, came to Kelowna as the new local superintendent of the BC Ministry of Social Welfare. Coincidentally, this was also the time social planning councils were being organized to identify pressing community social issues and decide on ways to deal with them. Lionel saw first hand, the struggles faced by many in the community and knew that government could not be relied upon to fill every gap. He connected people in the community, helped organize the Central Okanagan Foundation, and remained dedicated to its vision throughout his lifetime. Lionel guided those in need of help to fill out grant applications, nurtured new board members, and supported organizations as they worked hard to meet the community's diverse needs. While Lionel passed away in March 2012, he believed that "anyone can leave a legacy." The Central Okanagan Foundation was originally Lionel's vision and then it became his legacy to our community.



*Lionel believed that
"anyone can leave a legacy."*

Central Okanagan Foundation Inaugural Meeting

Foundation's first meeting in 1978:

The directors of the newly formed Central Okanagan Foundation have nearly \$90,000 in cash and pledges so far. The foundation has been formed on the suggestion of the Central Okanagan Social Planning Society and will allow citizens to establish permanent endowment funds for non-profit purposes that will contribute to the mental, moral, cultural and physical wellbeing of the Central Okanagan.



FOUNDATION COMMITTEE WELL ON ITS WAY

Back row from left: Ken Day, Tom Capozzi, Louis Rampone, Royce Bazett (Honorary Treasurer), Roy Pollard, H. B. Simpson, Don McConachie, Howard Carruthers, Bill Carruthers, Ron Fowler (Royal Trust)
Front row from the left: R. J. Bennett, Frank Williams (secretary), Dick Stewart (president), Cliff Serwa (vice president), Lionel Wace (executive secretary)
Missing: Rex Marshall, Ross Mollard (legal counsel), J. Bruce Smith, Madge Bannister Walden

What is a community foundation?

The Central Okanagan Foundation is an organization that gives time, leadership and financial support to local organizations, groups, or initiatives, that are involved in all aspects of the community: children, youth and family, education, health and community service, animal welfare, heritage and historical initiatives, global initiatives, arts and culture, and the environment.

Community foundations' focus on local priorities and award financial grants accordingly. As well, they provide support to organizations, which create and provide professional development opportunities for the charitable sector. The Central Okanagan Foundation has also provided leadership in undertaking a biennial engagement of the community to create Vital Signs, a snapshot of the trends in our city, highlighting progress we should be proud of and challenges that need to be addressed in the Central Okanagan.

Most recently it showcased organizations that have been successful in such areas as security, health, creativity and connectedness. This initiative is intended to be part of an ongoing community conversation which highlights areas of success while also pinpointing areas needing more attention.



How do community foundations work?

Community foundations are independent public foundations that strengthen their communities by connecting donors to inspiring opportunities to create maximum philanthropic impact. Community foundations provide leadership on issues of broad community concern.

Donations are received from many different sources, pooled together, and managed by professional investment managers. Funds are designated as endowment funds where only the income generated by the donation is spent, or flow-through funds, where the donated capital is accepted by the foundation and then paid out to charitable organizations according to the instructions of the donor.

People who want to make a difference in their community can donate in any amount to a community foundation and when their donation is combined with those of other donors with similar interests, great things can happen!

What happens to my donation?

- 1** If you donate to the foundation's Community Fund, the board of directors, on the recommendation of the Grants Committee and in response to applications received, will allocate funds to charitable organizations with the greatest need and/or where the funds will have the greatest impact.
- 2** You can set up a fund in the name of particular charitable organization, for a specific cause, or in an area of particular interest.
- 3** Funds can be named for or by a donor, perhaps in memory of a loved one or to create a family or business legacy, and then be allocated to a specific use or area of interest as indicated by the donor.

The First Ten Years

• 1978 – 1987 •

THE KELOWNA COURIER

– June 26, 1982 –

Central Okanagan Foundation seeks good funding proposals

The Central Okanagan Foundation has a \$16,000 problem. With a healthy budget and an abundance of enthusiasm for supporting the community, the foundation finds itself with a lack of “good funding proposals”...the foundation is looking for proposals that are of a “short-term duration with long-term benefits” to the Okanagan. We want our funding to be as broadly-based as possible.

“...a healthy budget and an abundance of enthusiasm for supporting the community...”

CENTRAL OKANAGAN FOUNDATION

ANNOUNCEMENT

The annual meeting of the Central Okanagan Foundation was held on October 30. The members ratified the distribution of the income as under-noted.

RECIPIENT	FUNDING
Kelowna General Hospital	\$ 600
Naramata Centre	600
Okanagan Neurological Society	100
Kelowna Society for the Mentally Retarded	400
Kelowna Bursary Committee	150
Kelowna Symphony Society Bursary	50
Central Okanagan Bursary Committee 23 Society	520
University of British Columbia for a Forestry or Agricultural Bursary in favour of a student who normally resides in the Central Okanagan, who on a basis of need and academic standing requires financial assistance in the pursuit of a Bachelors Degree in Agriculture or Forestry	500
Kelowna District Foster Parents Association, as a matching grant towards a bursary of \$400.00 to be awarded solely to a foster child residing in the Central Okanagan who is a ward of the Superintendent of Child Welfare, to assist in his or her educational endeavors at either the vocational, college or university level.	200
The Okanagan Symphony Society, Guest Musician Program as a matching grant to funds raised in other Okanagan Communities	1,000
Kelowna and District Arts Council, Concert Grand Piano Fund	1,000
Kelowna Youth Concerts Committee, School District #23 for Youth Concert Series 1979/80	600

TOTAL FUNDING \$5,720

The Foundation now has assets of \$76,528.00 and pledges of \$26,250.00.

Any person wishing to make a donation or desiring further information may contact Mr. Richard Stewart at ...

769-4151

A VERY *Grand Gala*



The Gwenneth Lloyd and Betty Farrally Endowment Fund



Dr. Gwenneth Lloyd



Betty Farrally

During Kelowna's 75th birthday celebration (1980), a group of local citizens established an endowment fund to honour Gwenneth Lloyd and Betty Farrally for their lifetime dedication to ballet. The well-known founders of the Royal Winnipeg Ballet had settled in Kelowna and established the Canadian School of Ballet. The fund was intended to recognize their contribution to dance in Canada, and continue their work by furthering the training of exceptionally talented young dancers.

Lionel Wace, a leading proponent of the community foundation and one of its most enthusiastic advocates, came up with the idea of a Grand Gala to launch this endowment fund, including asking Margot Fonteyn, a long-time friend of the honourees and legendary ballerina with Britain's Royal Ballet, to become its honorary patron.



Lionel Wace with Gwenneth Lloyd and Betty Farrally at their Gala on September 15, 1980



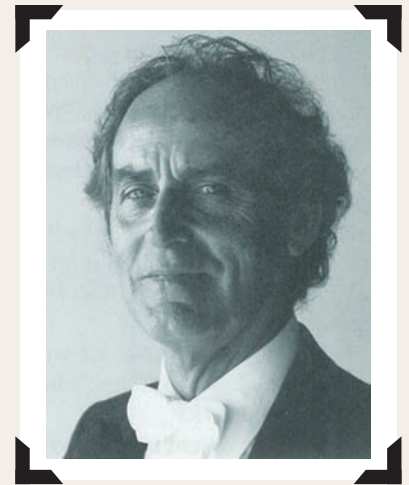
Margot Fonteyn in Sleeping Beauty

The Farrally/Lloyd Scholarship Endowment Fund is currently valued at almost \$15,000 and continues to support local students from the Canadian School of Ballet who wish to improve their skills. Because of the foundation's enhanced distribution in 2016, a scholarship for \$1,100 was awarded to a promising student to attend an intensive three week summer program with Ballet Kelowna.

Partnerships based on hope and trust

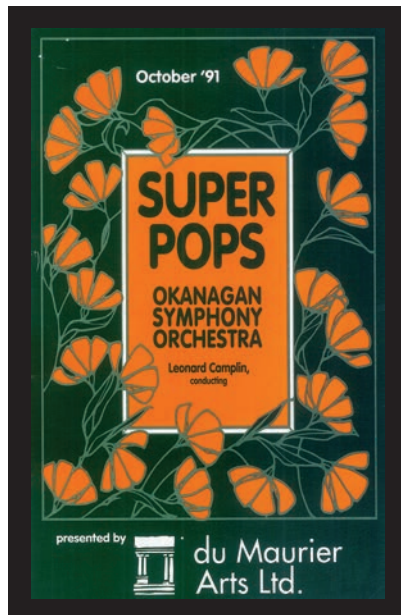


Though the Central Okanagan Foundation's early vision was grand, its distributions were relatively small – the Okanagan Symphony Society received \$100 in 1979, as did the Okanagan Neurological Society. However, those relationships were nurtured and developed, and from those early first grants, remarkable commitments emerged.



Leonard Camplin,
Okanagan Symphony Orchestra
Music Director, 1964 - 1991

The Okanagan Symphony Society, in hopes of becoming self-sustaining, established its own endowment fund in 1986, allocating half its membership fees to the fund.



Rosemary Thomson, Music Director

“Initially, the income generated will be used towards the cost of providing visiting players and guest artists...our long term goal is to ensure the future financial viability of the orchestra.”

In 1990, the Okanagan Symphony Endowment Fund was \$9,860. In 2000, the fund had grown to \$28,728. In 2010, the fund had grown to \$90,406, and in 2017, the symphony's endowment is \$151,368. As the original funds remain and have been added to in subsequent years, so also have the annual distributions grown. The most recent distribution was \$5,330, which represents the fund earnings from the fiscal year 2015/16.

Starbright

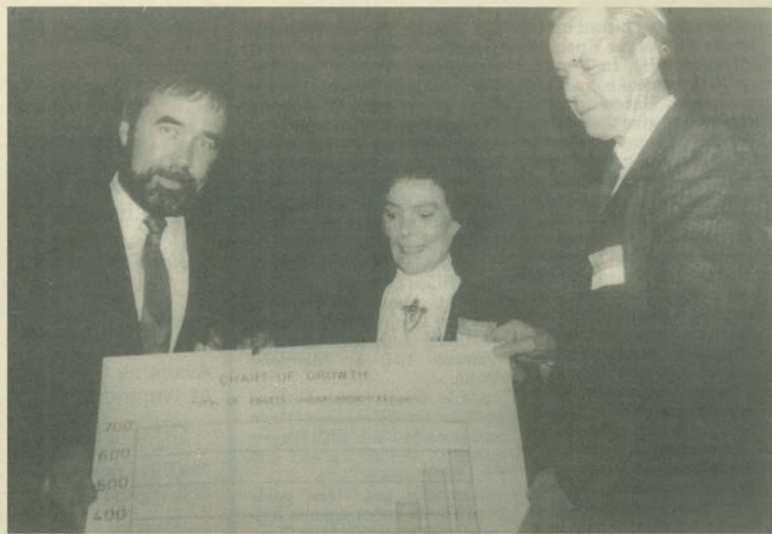
Children's Development Centre

The Starbright Foundation has evolved over the past fifty years from the Okanagan Neurological Association, to the Variety Child Development Centre, to the Central Okanagan Child Development Association, and more recently, the Starbright Children's Development Centre. During the intervening years, the organization has continued to provide an expanding variety of services to children and families.

WESTSIDE SUN

– December 10, 1987 –

Preserving the goose and golden eggs



It was an eventful 10th anniversary celebration for the Central Okanagan Foundation: The Okanagan Neurological Association, usually a COF funding recipient, chose this event to become a significant COF donor. Dave Metheral, president of the ONA was “moved almost to tears” when making the announcement that \$100,000 from the sale of the association’s building on Collett Road was being set aside in an endowment fund in hopes of meeting the “rising needs levels of the district’s children.” The intention was that income from this endowment would cushion the impact of the fluctuations in government funding for the critical services needed by children and their families attending the centre.

News Article: Dave Metheral, President of the Okanagan Neurological Association (ONA), Lorraine Devries, Executive Director of the Calgary Foundation, and R. J. Bennett, President of the Central Okanagan Foundation

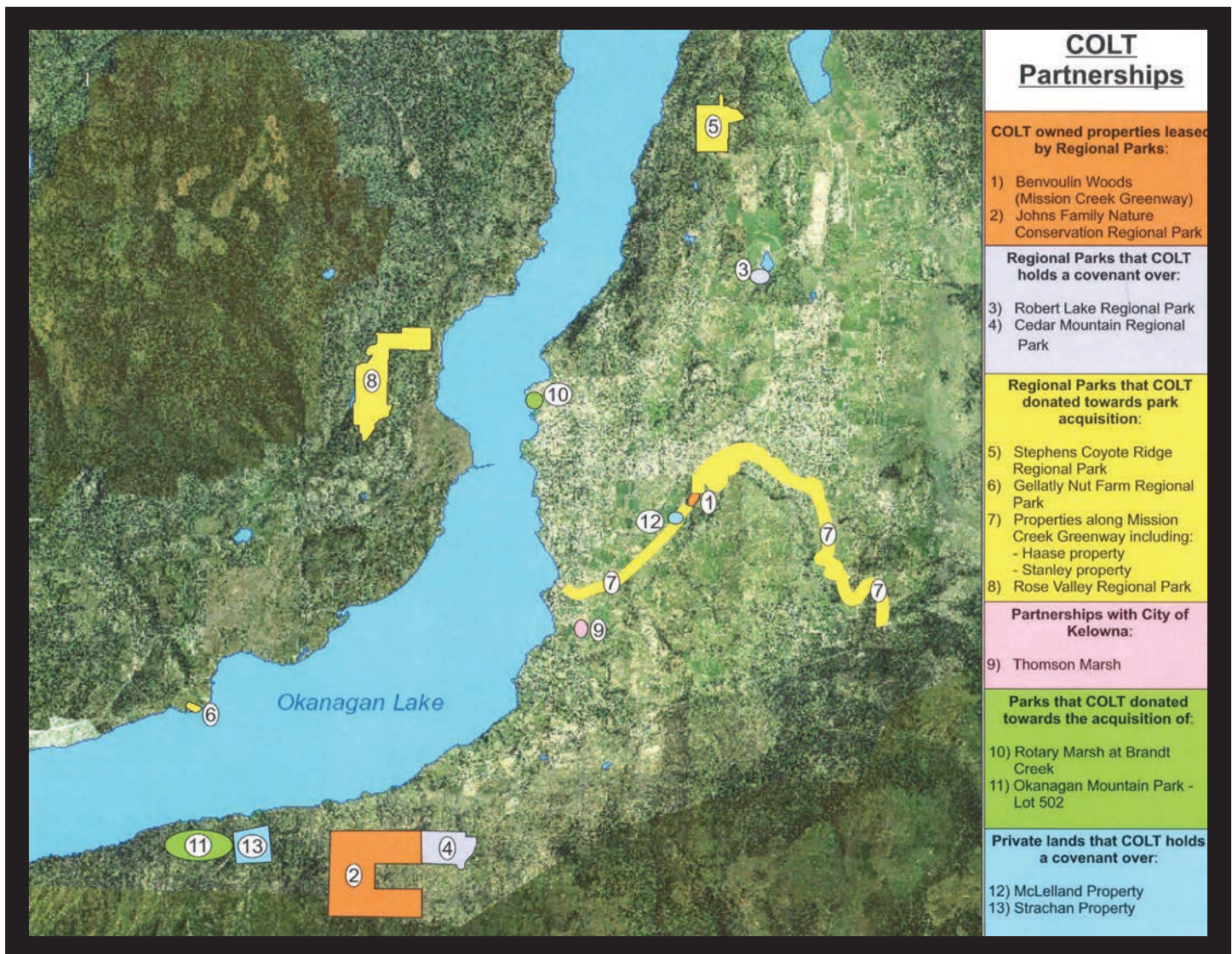
In 1990, the Okanagan Neurological Association had an endowment of \$105,050 including the above noted contribution; in 2000, the Central Okanagan Child Development Association Endowment fund had grown to \$108,082; in 2010 the fund had grown to \$115,066, and in 2017, the Starbright endowment is \$118,518. As the original funds remain and have been added to in subsequent years, the annual distribution has risen accordingly: most recently \$5,333, which represents the earnings from the 2015/16 fiscal year.

The Second Decade

• 1988 – 1997 •

KELOWNA CAPITAL NEWS

– December 3, 1990 –



A 'landmark event' for foundation

In what Lionel Wace declared was the biggest project the COF had ever taken on, the Parks and Wildlife Trust Fund was created by a foundation grant of \$25,000, which was subsequently matched by a similar grant from the City of Kelowna. Since the foundation could not hold land or material assets, a separate trust was created to purchase and/or hold donated land in its natural state, for the preservation, conservation, or fostering of nature or wildlife sanctuaries, parks or preserves for future generations.

A Success Story

The name of the society was simplified in 2007 to Central Okanagan Land Trust (COLT). Successful beyond most optimistic expectations, the trust now holds assets in excess of \$8,000,000. In partnership with local and regional governments and other funding bodies, two of the trust's more recent visible projects include the restoration of Munson's Pond as well as the meanders and shoreline along Mission Creek Greenway. These lands are maintained in perpetuity through active stewardship and will ensure not only the region's biodiversity but also public access to these areas. COLT currently owns about 99 hectares in the Central Okanagan as well as administering a number of registered covenants.



In celebration of the 25th Anniversary of COLT in 2015, the 40th anniversary of the Regional Parks system, and his retirement after 26 years in local politics, Robert Hobson and his wife Adair, his sister-in-law, Margaret and his brother, the late David Hobson, collectively made a significant donation to the community. In addition to their \$200,000 donation to the COF, the family donated an additional \$50,000 to the Central Okanagan Land Trust. "It's the largest contribution the foundation has had in some time that hasn't come from an estate" according to the Central Okanagan Foundation Executive Director, Bruce Davies...

Hobson noted: "It's a lot more fun giving money away when you are alive!"

COLT and how it works:

1

To ensure the preservation of natural areas, landowners can donate land to the trust or, if they prefer to retain ownership, they can register a covenant to protect the land's natural values.

2

The trust undertakes to conduct an annual inspection to ensure the property is being protected.

3

Donors also receive a charitable tax receipt.

THE KELOWNA COURIER

– November 23, 1995 –

**WE'VE LOST A
\$1,000,000...**

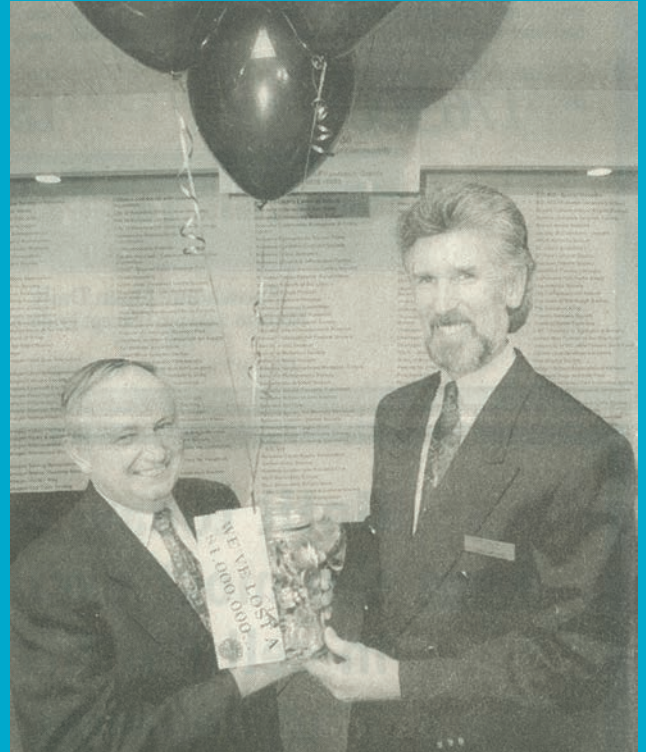
**...and it was found
in our community!**

The Central Okanagan Foundation is Kelowna's only Community Foundation. Donations received by the Central Okanagan Foundation are held in perpetuity.

Only the investment income from these funds is distributed annually. Since its inception in 1977, The Central Okanagan Foundation has distributed grants to hundreds of organizations in our community without diminishing any of their principal. **As of November 22,**

**1995 the Central Okanagan Foundation will
have invested \$1,000,000 in our community...**

and throughout the years many of your favourite community organizations have received these funds!



Mayor Jim Stuart received a jar of chocolate loonies from Jamie Brown, president of the Central Okanagan Foundation, after a giant list of all the foundation's grants was unveiled at the Kelowna Community Theatre



This was the Central Okanagan Foundation's first million dollar milestone: "We have given away a million and still have all the capital in the bank," according to COF president, Jamie Brown. "We feel that's a wonderful accomplishment." Executive Director, Janice Henry, the foundation's only paid employee, offered: "We are like a community mutual fund."

*"We have given away a million and
still have all the capital in the bank"*

The Third Decade

• 1998 – 2007 •

“Come Celebrate With Us”



 **CENTRAL
OKANAGAN
FOUNDATION**

*22 years helping good people
do great things*

*L-R: Dick Stewart, R.J. Bennett, Jamie Brown, Ron Russell, all Past Presidents
& current President Alan Dolman*

Gala Fundraising Dinner *September 22, 1999*

This 1999 Gala was grandest ever held in the valley. Sponsored by The Grand Okanagan Lakefront Resort and the Okanagan Chefs' Association, it featured seven local chefs and three estate wineries. Over 650 tickets were sold to foundation supporters, donors and fund holders.

Photo Top R: Lois Serwa and Tony Stewart, Gala Co-Chairs and Masters of Ceremony, pay tribute to Ann and Bruce Smith, among the several Central Okanagan Foundation founders in attendance, who made a significant additional donation to their original family fund that night

Photo Bottom R: Dick Stewart, founding president of the COF, and his son Tony Stewart, Gala Co-Chair



2003 Okanagan Mountain Park Fire



The fire that no one thought could ever reach Kelowna, engulfed the south end of the city, the Okanagan Mission area, with such ferocity, speed, and destruction that everyone was stunned.

Record numbers of people were evacuated, some more than once. First responders risked their lives, water bombers scooped endless buckets of water from Okanagan Lake, and the community mourned the loss of the Kettle Valley Railway Trestles, which were also in the path of the flames. A blanket of thick gray smoke and flying embers covered the Central Okanagan for days.



People were enormously generous in the face of the disaster as donations from across the country came pouring into the city... along with the dilemma of what to do with the funds, who should administer them, who was in greatest need, and who should receive the money.

The Central Okanagan Foundation had been established primarily to administer endowment funds. However, they were also already in existence, they could provide charitable receipts, and so quickly offered their services to become the community's go-to organization for management and distribution of the funds. With the COF's considerable financial, volunteer and administrative commitment, the Okanagan Yellow Ribbon Campaign carved out a new role for the foundation.

COF Flashback Evening

The Founders' Dinner A 30th Anniversary Celebration Dinner

"A tribute to the people and families whose vision helped shape our community"

October 17, 2006



Lionel Wace and Frank Williams were both pivotal in the early development of the foundation; Lionel as the visionary executive secretary for many years, and Frank, whose wisdom and guiding financial skills were vital to the foundation's success.



A gathering of some early founders and friends, 30 years later, with familiar names including McConachies, Bennetts, Lionel Wace, Ken Harding, Gail Plecash Capozzi, the Stewarts, and the Serwas.

The Fourth Decade

• 2008 – 2017 •



A milestone year!
\$2+ Million
in distributions

November 24, 2014

At their Annual Community Meeting, the Central Okanagan Foundation announced a major increase in the funds it would be distributing to various community organizations this year. Through higher than anticipated returns on their investments plus significant new donations, \$2.25 million dollars would be distributed during the coming year. Two new initiatives were also unveiled: multi-year operational grants, which provided local charities with an invaluable base of support to move their essential work forward. The foundation also established a contingency fund to insulate itself from the sometimes-volatile investment markets and ensure they would be able to meet their financial commitments on an ongoing basis.

Senator Ross Fitzpatrick Tribute Dinner

Hosted by the Central Okanagan Foundation and joined by a sold out crowd of friends, family and colleagues, the evening was a recognition of one of the community's own success stories: Senator Ross Fitzpatrick grew up in the Okanagan and although retiring from both active and successful business and political careers, he continued to make an impact on the community. The Fitzpatrick family, along with several friends and supporters, made significant donations to the COF to support many of the community's charitable organizations.



Ross and Linda Fitzpatrick.

In his closing comments, Senator Fitzpatrick reminded those attending that "charity really does begin at home"



Senator Fitzpatrick with surprise visitor, friend and colleague, Prime Minister Jean Chretien

Find your own way of giving

Gifts can be made in the form of cash, pledges over a number of years, stocks, bonds, property, bequests, life insurance memorial gifts, the transfer of existing trust funds, or the establishment of an endowment funded by a charitable organization. There is almost no limit on how you can give, or how your gifts can be distributed.

A few creative ideas from the past...

AN INDIVIDUAL GIFT



One of the most unique donations the foundation ever received was a portion of the royalties from an Alberta oil well. While the donor insisted on anonymity, the royalties enabled the foundation to start meaningful distributions to the community. Final royalties were paid out in 2003, by which time the foundation had received about \$150,000 over the 20 years of the oil well's producing life.

A MEMORIAL GIFT



Ron Russell was the president of the COF in 1997 and 1998. He passed away unexpectedly and prematurely in 2010: among his assets was his beloved Mercedes Benz sports car. Ron's family knew he was passionate about his car as well as committed to the Central Okanagan Foundation. As a unique gift, they donated Ron's Mercedes to the foundation, which subsequently sold it to a collector in New Jersey who spent five years restoring it before putting it back on the road in 2015. The proceeds from the sale of the car went to the Ron and Priscilla Russell Family Fund, which supports the foundation's administration and operating expenses.

A community gift



PROJECT BUILD BREAKS NEW GROUND



In a creative initiative in 2007, the local real estate industry decided to give back to the community: industry partners, including developers, builders, tradespeople, and service providers came together with donations of cash, materials and labour to build a new home in Lake Country. The home was sold when completed and the proceeds were donated to the Central Okanagan Foundation. It was a natural fit – both the development community and the foundation are committed to building a stronger more vibrant community.

A generational gift

The KSER Scholarship Fund

Kelsey Serwa is the granddaughter of COF founder and first Vice President, Cliff Serwa. She grew up hearing about the Central Okanagan Foundation before she became actively involved with the organization in 2013. Kelsey's remarkable success as an Olympic athlete has given her insight into how challenging it is for young people to strive for excellence and follow their dreams, without an enormous amount of community and family support. With the establishment of this fund, Kelsey is encouraging – and supporting – other young student athletes to venture out, pursue their passions, and achieve excellence in both athletics and academia.



As well as nurturing others, Kelsey has also become a trailblazer for her own generation when it comes to giving.

In celebration of Central Okanagan Foundation's 40th Anniversary in 2017, four enduring scholarships will be created to recognize volunteer spirit in the Central Okanagan, thus leaving a lasting legacy to enable our communities to flourish today, tomorrow and forever.

The Central Okanagan Foundation Volunteer Spirit Scholarship Fund offers financial support to a current resident of the Central Okanagan who is, or has recently been, an active volunteer either in a Canadian community or internationally. The purpose of the scholarship is to assist with post-secondary education, in any location. Each year, there will be one scholarship awarded to a resident from each of the four Central Okanagan municipalities: Peachland, West Kelowna, Kelowna, and Lake Country.



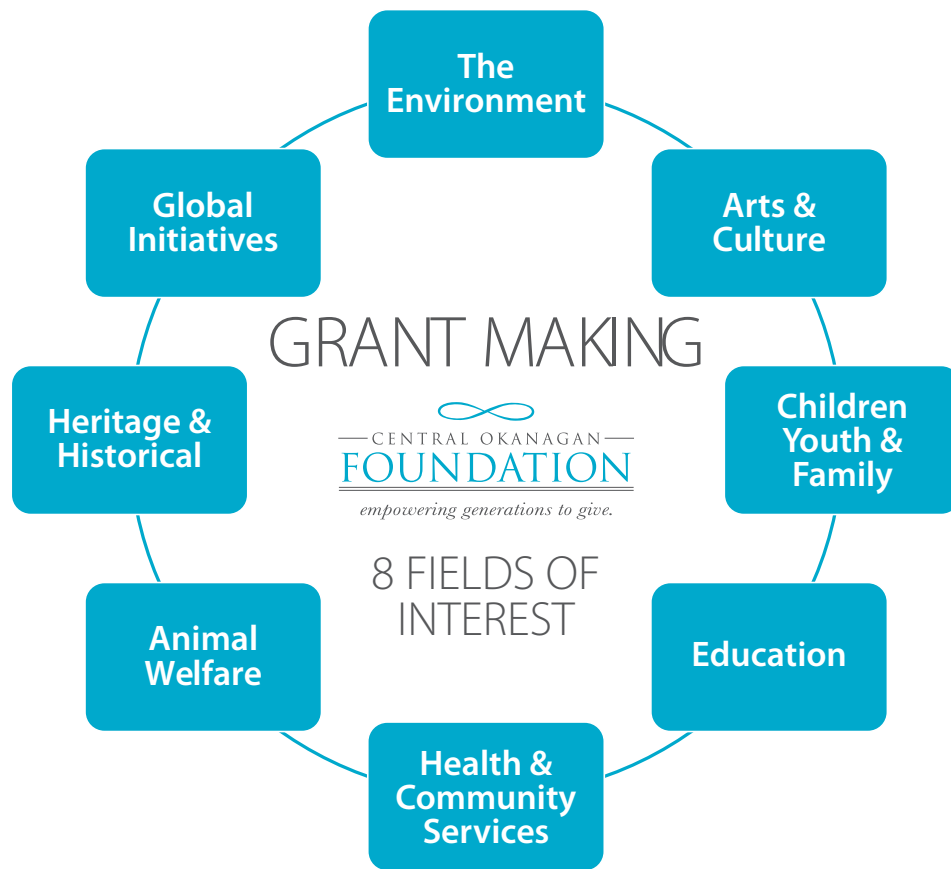
COF grant recipients at work in our communities.

Join us

We are reaching out to the community by making 40 presentations, including a newly created video, to share with interested organizations who could benefit from being part of the Central Okanagan Foundation family

"These are exciting times for our foundation and our community... and we have a great team of staff, volunteers, and supporters working with us."

Bruce Davies, COF Executive Director



Looking for more information?

Contact us at
www.centralokanaganfoundation.org
Phone: 250-861-6160



Central Okanagan Foundation



@centralokanagan

This publication has been written and compiled by *Sharron J Simpson*; photos from *Glenna Turnbull*, *Sharron Simpson*, and *Pentaphoto*; input from *COF staff and volunteers*; layout and design, *Sandy Magee at redsand creative*; photo and image scanning by *Kettle Valley Graphics*.