

Annual Report 2021/22



Making a Difference

We cannot possibly thank each of you enough for the role you play in our success and ultimately what it means to the Central Okanagan.



As we move forward, past COVID, and beyond an era in time that has forever changed how we look and approach our day to day lives, our safe circle, our individual and group tolerances, what we deem as being unwell, and the costs and challenges associated with the last two years, there are a few things that resonate.

- WE were all in this together.
- WE all experienced loss and change.
- WE all have the power to make a difference.

difference

['dif(ə)rəns] NOUN
(IDIOMATIC, INTRANSITIVE)

To carry out an action, the result of which is a significant change, or an altered circumstance.

The word “difference” resonates with the Central Okanagan Foundation in many ways. We are grateful that our Donors and Fundholders are on this journey too as we couldn’t do the work we do without their continued gifts. **Giving is the difference that can truly make the difference.**

We are also approaching who we grant to and how we grant in different ways. This is largely based on the changing needs of the community, the impact our Donors and Fundholders want to have, and the emerging and different level of diversity, inclusivity, and equity that has been long overdue.

Last, but not least, we are finding that the times, as uncertain as they have been, have presented a different rate of return than we have historically seen. Even as very prudent investors with a careful eye on the over \$40 Million that we have been entrusted with, saw a minor loss at year end, for the first time in many years.

These are the differences we choose to pay attention to. Through this understanding and learning, the nature of our business is one thing that isn’t “different”. We still honour and respect the trust that each of our Donors, Volunteers, Grant Beneficiaries, Charitable Partners and Community Leaders place with us. We cannot possibly thank each of you enough for the role you play in our success and ultimately what it means to the Central Okanagan. Daily we are touched with the impact that the Central Okanagan Foundation has, through you, on the fabric of the community. While we would be happy to share them all, we have selected just a few to feature in this report. We hope you enjoy. ■

Kaine It Forward



On July 25th, 2022 Kaine Marcel Carlson Kirke passed away suddenly due to the poison drug supply epidemic. As so many have, Kaine started down a harmful path, flirting with drug use to numb himself as he navigated his way through his late teens and early adulthood. He knew it wasn't a path that he wanted to be on and tried several different avenues to find support and keep himself sober, and was making progress until that fateful day. He struggled to find the path that fit best, and ultimately it was in one weak moment, when he reached out to obtain his drug of choice, that he was poisoned and will now never be able to choose again. In his absence, the family struggled to find meaning and purpose in their new reality. His short, and yet impactful life, and death, had shattered his family and friends beyond repair.

Working closely with the family, a mission statement was developed along with a fund held with the Central Okanagan Foundation. The **KAINE IT FORWARD FUND** was created with a desire to have an impact in the community. Initially, their hope is to work hand in hand with our local community organizations that work with youth to support their endeavors. Bachelor Suite Boards has partnered with the **KAINE IT FORWARD FUND** and plans to provide skateboards to kids who

might not otherwise have the opportunity to learn to skate. They have several of Kaine's friends who are very big in the skateboarding community who will be volunteering time to hold skate sessions at the local skate parks in honor of Kaine.

KAINE IT FORWARD will start with young minds, and extend to those who have struggled a lifetime... to inspire the positive ripple effect, and help create a generation geared towards acting in service of each other. The idea is to invoke passion and help youth find positive outlets for their creativity and energy, and to help bring meaning and purpose to the lives of those struggling. Their hope is to bring forth the desire for a reciprocal, inclusive and loving community.

To honour KAINE CARLSON (KIRKE), and his short yet impactful life by creating community, a sense of belonging, a safe place to "just be", and to act as a catalyst for youth so that his untimely death, like so many others, can carry a deeper purpose.

For the Central Okanagan Foundation there have been many, very sad situations, that resonate with us and the funding we do for the community to address many areas of mental health and wellness, troubled youth, alcohol addiction and drug awareness counselling, and many areas of the Social Service Sector. We are not alone in working with partner agencies to see this eradicated. When a family reaches out in need, hurt, and wanting to do more, it is both a privilege and an honour to set up a fund that will have an everlasting effect. Although our role is administrative in nature, we grieve with families, and hold a leadership role in the bigger picture that can be helpful as they navigate their desire to give back. Our hearts go out to Kaine's family and friends. If you too have been touched by their passionate endeavors, you can find out more on their website, or make a contribution to assist their work. Together we can make a difference. ■

www.kaineitforward.com

Generations of Kindness Keep Giving



On August 4th a cheque was presented to the Friends of Fintry on behalf of the Ben Lee Legacy fund, administered by the Central Okanagan Foundation. The cheque presentation for \$5,000 took place in the Ben Lee room in the Manor house at Fintry. The Friends of Fintry sincerely appreciate the fact that Mrs. Joyce Lee and her sons John and Robert were able to bring this about and participate in a refreshing of Ben Lee's legacy.

It was Ben's foresight that convinced the Regional District of Central Okanagan to partner with the Provincial government to purchase the land, thereby

securing a spectacular park and heritage site for the public. This contribution to the funds is intended to enhance the public's access to the heritage of the Fintry Estate. Precise details of how this is to be achieved will be agreed upon by the Lee family and the Friends of Fintry.

The Fintry Estate is the major heritage site along Westside Rd. and provides indoor and outdoor educational tours, special events on site and a variety of presentations throughout the surrounding communities. Special features of the Estate include: the historic Packinghouse, Octagonal Dairy Barn and an impressive waterfall. The Provincial Park has well over 100 campsites, boat launch, beaches and day use areas.

According to the Friends of Fintry, Ben Lee was an incredible man, committed to preserving culture and instrumental in Fintry becoming a Provincial Park. They were very grateful for this donation and will put the funding to good use.

Working with John and his family has been an honour. Their ability and desire to make a difference long after Ben's passing is admirable. We do believe everyone can leave a legacy. ■

COF Board Members



Anita Boehm,
Board Chair



Karen Hill,
Vice Chair



Dustyn Baulkham,
Board Secretary



Marni Adams,
Director



Dustin Titus,
Director



Kim Inglis,
Director

COF Staff

Judy Neiser, CEO • Julie Belgrove, Financial Administrator
Cheryl Miller, Director, Grants & Community Initiatives • Robin Smith, Executive Administrator
Abbie Norrish, Coordinator, Grants and Community Initiatives
Anna-Lyn Albers, Community Entity Coordinator – Reaching Home

With Gratitude

Our appreciation goes out to three long time volunteer board members for their enduring time, commitment and support to the Foundation.
Ben Walker, Mike Gilmore and Alison Moscrop

Regional Support



Geoff Evans and Tanya Chartrand

Photo supplied by district of Lake Country

Like so many other donor advised funds, the LCFD Legacy Leadership Fund is invested as an open endowment fund through us here at the Central Okanagan Foundation. Individuals and organizations are welcome to contribute to the endowment fund to speed its growth and sustainability in supporting Lake Country paid-on-call firefighters providing first response service to the growing community.

This is just one way that we, at the Central Okanagan Foundation, can support surrounding areas increase the support they receive in their community. The advantage of charitable tax receipting along with low cost management of funds supports the good work already being done in the region. We have a great track record of working with individual donors, corporate entities, the various arms of the government in either attracting funds that are needed to solve substantial issues, or granting funds out to agencies and organizations who deliver solutions at the front line. It is all part of a different approach to very different issues and solutions in the Central Okanagan Foundation delivery area. ■

In May, the Lake Country Fire Department announced a new LCFD Legacy Leadership grant program to its members. The grant program is a unique new support for career advancement in fire service leadership specifically for active LCFD members.

A total of close to \$200,000 has been directed to date by an Anonymous Donor and Lake Country Fire Department supporter, who feels that this funding will provide ongoing and annual dollars to members seeking to move forward in their educational goals within their active service. The goal in establishing this endowment fund with the investment income to be awarded in the form of grants, is to inspire paid-on-call members to excel in fire service leadership through training, development, coaching and education which is over and above the regular first response training provided to the membership.



How Have We Done?



A word from a founding member

“It has truly been a success story – right from the beginning, to be involved in something that so greatly enhances and addresses so many vital needs within the community.”

– Cliff Serwa, Founding Member and Fundholder

Cliff and his wife Lois (a longstanding member of the Grants Committee) continue to support the original reason the foundation came to be. We are grateful for their continued support.

Over **\$40.0 million** in assets

Portfolio return
averaged over
**10% since
inception**

Grants and
distributions to
community nearly
\$3.6 million
in 2022

Serving
the greater
community
since 1977

See full financial statements at www.centralokanaganfoundation.org

CHANGES IN THE SECTOR

The Federal Budget released in June of 2022 has led to some significant discussions for the Industry. We are closely watching what our counterparts are doing both within Community Foundations of Canada and the charitable sector as a whole. Traditionally we have been held to a disbursement quota that averages at 3.5%, the new budget is scheduled to change this to 5.0%. In a year such as last year where returns were less than anticipated, this will prove to be an interesting dilemma moving forward. Additionally the Federal Government has looked closer at how and who we

fund to. They recognize that there are an abundance of organizations that do great work in the community but are not currently a registered charitable entity.

Right now we are restricted in our granting to only grant out to those charities that have a registered charitable number and remain in good standing with the charities directorate. Rest assured we are monitoring this closely and the requirements, due diligence and reporting that go with these changes. We expect more information and clarity in January 2023. ■

Sharing Success Here at Home



Reaching Home is Canada's Federally funded 2019-2024 Homelessness Strategy, Reaching Home is a community-based program aimed at preventing and reducing homelessness across Canada, the program is guided through the Reaching Home Directives document which provides 7 directives to guide the program.

Canada

Okanagan Boys and Girls Clubs – Upstream Kelowna

Reaching Home COVID-19 Round 2 provided funding to cover costs of staffing, coordination and purchase of supplies and material to support the Upstream Kelowna pilot project led by Okanagan Boys and Girls Clubs which is an adaption of the national Upstream Canada initiative.

The Upstream Canada initiative aims to prevent rather than respond to youth homelessness in Canada using early intervention.

Using a population-screening tool, the Upstream Canada project model identifies at-risk youth and seeks to connect them, as well as their families to supports to help them remain in school and maintain stable housing, reducing their risk of experiencing homelessness. The initiative aims to improve student's well-being and minimize disruption to their education.

The initiative originated in Australia, where it has demonstrated huge success with a 40 per cent reduction in youth homelessness and a 20 per cent reduction in drop out rates. The project is capable of identifying up to 50 per cent more at risk young people than were previously known!

The Upstream Kelowna initiative was reported as a success and has continued past the Reaching Home contribution, in November 2021 this program won the Making the Shift Youth Homelessness Prevention Award! The program is part of the activities co-led by A Way Home Canada and the Canadian Observatory on Homelessness to transform our response to youth homelessness.

The Upstream Kelowna initiative is led by the Okanagan Boys and Girls Clubs in partnership with A Way Home Kelowna, Arc Programs, The Bridge Youth and Family Services, Ki-Low-Na Friendship Society, Foundry Kelowna, and School District 23. ■

Sharing Success Here at Home



Okanagan Fruit Tree Project Society

With a mission to “cultivate community through local food”, The Okanagan Fruit Tree Project Society uses a multifaceted approach to build equitable food access and healthy local food systems in the Okanagan.

While the organization started as food rescue-where volunteers harvested fruit from the community that would otherwise go to waste and shared it with community organizations, it has expanded and now not only distributes fruit to over 100 schools and agencies, but also supports community farming initiatives, collaborative harvests with community partners, and facilitates community engagement projects.

The donation of a 36-acre plot of land in 2021 will allow the organization to continue to grow its impact, and the funding it has received from the Central Okanagan Foundation through a \$15,000 grant in 2021 and a multi year \$45,000 grant in 2022 will support this growth.

Approximately 14% of households in the Okanagan experience food insecurity, but thanks to the invaluable work of Okanagan Fruit Tree Project Society and support from Donors through the Central Okanagan Foundation, the community will continue to build nourishing local food systems for years to come. ■

Executive Director, Casey Hamilton said the following about Okanagan Fruit Tree Project Society’s funding through the foundation, “We are so grateful to be receiving COF support for our 2022-2024 seasons. This funding has helped, and will continue to help support both programming and operations at the OFTP. First, it is supporting ongoing program management and coordination as well as the development of new branches of existing programming. This means that it is helping us work towards building equitable food systems in the Central Okanagan, which includes increased access to fresh produce for vulnerable community members as well as creating opportunities for increased participation in local food systems. COF funding is also supporting us in the undertaking of a land survey at our newly donated farm property in East Kelowna, which we plan to develop into a successful community farm and home base for OFTP operations. Finally, the funding is supporting sound fiscal management and planning to support our organization as it grows.”



Sharing Success Here at Home



Thompson Okanagan Air Rescue

Air Rescue One is the primary air rescue team in the Thompson Okanagan, working alongside Search and Rescue groups and other emergency services. For the past 8 years, its volunteer team of firefighters, advanced life support paramedics, doctors, pilots and search and rescue personnel have been available at a moments notice to exercise their elite training for helicopter based rescues using longline and winch rescue protocols.

The Central Okanagan Foundation awarded a \$5,000 grant in spring 2021 to help the organization create stability through strategic planning focusing on assessing its funding model, operations, and partnerships. With the successful completion of this initial project, Air Rescue One returned to the Central Okanagan Foundation in spring 2022 to support implementation and was awarded an additional \$15,000.

Executive Director Jeremy Vandekerkhove had this to say about the need for Central Okanagan Foundation funding, "First and foremost, we at Air Rescue One are a team of rescuers. Because of this, for years our primary focus and expertise was on performing

technical rescues safely, and always being available when the need arose. However, what we lacked was a plan to overcome our challenges to grow and sustain our helicopter rescue program. The strategic planning grant from the Central Okanagan Foundation allowed us to bring in expertise from outside the rescue world, and help us to develop a plan for greater sustainability of our program. In 2022, Air Rescue One was fortunate to receive another grant from the Central Okanagan Foundation for implementation of our strategic plan. The implementation of our strategic plan is allowing us to increase support for our program both regionally and provincially, pursue capital investments, and develop new partnerships that will ensure the long term success of our rescue program."

The Central Okanagan Foundation proudly supports projects that allow organizations to thrive in changing and challenging environments. Air Rescue One undeniably does this, with over 35 rescues in 2020 and 2021.

Enjoying the outdoors is an essential part of life here in the Central Okanagan; organizations like Air Rescue One help our community do so safely. On behalf of our Donors this is an area that we are proud to help fund. ■

Okanagan Collaborative Conservation Program



The Okanagan Collaborative Conservation Program is a partnership of organizations and government focused on conservation issues in the Okanagan basin of British Columbia, Canada.

The Okanagan Collaborative Conservation Program exists in part to act as a hub of information and resources that help our community take action to improve environmental protection in the Okanagan.

Strengthening Communications for Conservation

Okanagan Collaborative Conservation Program Action Teams, local governments, indigenous communities

and other partner agencies are successfully developing and implementing innovative projects for environmental protection and conservation, climate change mitigation, and sustainable land use planning.

While much is being done to collaborate on project planning and implementation, there is a desire to identify opportunities for increasing awareness and potentially coordinating communication and outreach activities. Together, local government planners, communications specialists, indigenous communities and OCCP partners all play an important role in effectively communicating the work we do to improve environmental protection in the Okanagan.

On March 6th the OCCP hosted a half-day communications workshop, facilitated by communications expert Jan Enns, focused on building the skills and tools to improve communications on important environmental and conservation issues and projects across the Okanagan region.

The focus of the interactive workshop was to explore how we can collaborate to spread the word about these projects and broadly communicate the importance of protecting and restoring our environment. ■



The Central Okanagan Foundation is happy to partner with agencies and individuals who are making a difference in areas such as Environment, where the beauty and natural surroundings we appreciate the most is often taken for granted.

Childhood Connections



Since 1977, Childhood Connections – Okanagan Family & Childcare Society (formerly Kelowna Child Care Society) has been providing services and resources to help children in our community grow and thrive in safe, secure and healthy environments. We help families find the right care environment for their children, and we support those who provide care with valuable training and resources.

Nourishing Families Program

The first 2,000 days of life are critical to raising socially-emotionally strong children, who will be resilient to adversity in their teenaged and adult years.

The Family Support Worker with Childhood Connections conducted outreach work to identify, assess and provide access for low-income families to early childhood development supports and services.

The Family Support Worker forged a stronger relationship with families by meeting the families at their homes, adaptation to service delivery was beneficial by addressing the barriers for families to access supports to raise vulnerable children. Childhood

Connections exceeded their target, providing activities to 214 households (target = 200, 395 children/ 357 parents/caregivers). All families had one or more vulnerable children under the age of 12. Over 50% of households were headed by single women, 30% were indigenous, and 20% newly arrived immigrants.

Staff visited 214 food insecure, low-income households 6 times each to establish relationships, identify the child's and parents/caregivers' needs, and ensure accurate and timely information, advice and referrals were made. Of the child vulnerability assessments, 214 of the households had a vulnerable child who required additional support and care, which correlates with identifying families using socio-economic and demographic data to reach families who would typically not receive services and programs.

Of the children identified as vulnerable, six received play therapy courses. In addition, over one hundred parents/caregivers participated in participatory, problem-solving workshops.

Funding received through the Central Okanagan Foundation for this program has been invaluable. Delivery and outreach at times was difficult, but it created the opportunity to try new and innovative ways to strengthen the program, for the long term.

One of the most important benefits has been families accessing play therapy, workshops and community events - the increased need for play therapy was surprising, which still has a waitlist of over 20+ families. Another crucial benefit for the community was understanding how much vulnerable children were struggling during COVID-19 during a prolonged period of isolation for families. Parents also lacked opportunities to compare their child's development with others. The needs assessment and action plans helped to ensure children were developing appropriately. Families reported a greater need for in-person events to reduce isolation and loneliness. ■

Grants

COMMUNITY, CITY, and DONOR ADVISED GRANT RECIPIENTS

Abbeyfield Houses Society of Canada
Ablesail Okanagan Association
Air Rescue One Heli Winch Society
Alzheimer Society of B.C.
Amyotrophic Lateral Sclerosis Society of BC
Arthritis Society
Arts Council of the Central Okanagan
Athletics for Kids Financial Assistance (BC) Soc
BC Amateur Sport Fund
BC Cancer Foundation
BC Lions Society for Children with Disabilities
BC SPCA - Vancouver
Board of Education of School District No. 23 CO
Board of Education of School District No.53 OS
Bridge Youth and Family Services Society
British Columbia Council International Cooperation
British Columbia Guild of English Handbell Ringers
British Columbia Lung Association
British Columbia Professional Firefighters Burn Fund
British Columbia's Children's Hospital Foundation
Building Healthy Families Society
Canadian Cancer Society
Canadian Diabetes Association
Canadian Hemophilia Society, B.C. Chapter
Canadian Mental Health Association Kelowna Branch
Canadian National Institute for the Blind
Canadian Red Cross Society
Canuck Place Children's Hospice Society
Central Okanagan Association for Cardiac Health
Central Okanagan Bursary & Scholarship Society
Central Okanagan Community Foodbank Society
Central Okanagan Elizabeth Fry Society
Central Okanagan Emergency Shelter Society
Central Okanagan Heritage Society
Central Okanagan Hospice Association
Central Okanagan Land Trust C.O.L.T.
Chamber Music Kelowna Society
Child Advocacy Centre of Kelowna Society
Childhood Connections-Okanagan Family & Childcare Society
Children's Family House Society of BC
Neighborhood Grants through the City of Kelowna
Clubhouse Child Care Centre
Community Recreational Initiatives Society
Cool Arts Society
Cops for Kids Charitable Foundation
Diocesan Pastoral Council
Disabled Sailing Association of BC -Okanagan Branch
District of Lake Country
Doctors Without Borders Canada
Earth Rangers Foundation
First Nations Schools Association
Friends of Fintry Provincial Park
Friends of Mission Creek Society
Friends of Parrot Sanctuary Society

Friends of the South Slopes
Girl Guides of Canada British Columbia Council
Governors of the University of Calgary
Habitat for Humanity Okanagan
Hands in Service Canada
Heart and Stroke Foundation, BC and Yukon
Helping Out People Exploited Society
HER International Foundation
Highway to Healing Support Society
Hope Air
Impact Tomorrow Foundation
Interior Wildlife Rehabilitation Society
John Howard Society Okanagan & Kootenay
Junior Achievement of BC
Kelowna & District S.H.A.R.E. Society
Kelowna & District Society for People in Motion
Kelowna Art Gallery Association
Kelowna Ballet Society
Kelowna Community Music School Society
Kelowna Community Resources Society
Kelowna Family Service Centre Society
Kelowna General Hospital Foundation
Kelowna Gospel Mission Society
Kelowna Museums Society
Kelowna Visual and Performing Arts Centre Society
Ki-Low-Na Friendship Society
Kiwanis Music Festival Society of Kelowna
Lake Country Art Gallery Society
Lake Country Food Assistance Society
Lakeside Educational Society of Kelowna
Launch Community Development Foundation
Launch Financial Education Society
Leprosy Mission Canada
March of Dimes Canada
Mountain Medical Services Society
Multiple Sclerosis Society of Canada
Muscular Dystrophy Canada
Naramata Centre Society
Nature Trust of British Columbia
New Opportunities for Women (NOW) Canada Society
New Vintage Theatre Society
Niteo Africa Society
OCCA Communities Association
Okanagan Artists Alternative Assoc
Okanagan Boys and Girls Clubs
Okanagan Christian School (OKAA)
Okanagan College
Okanagan College Foundation
Okanagan Crime Stoppers Society
Okanagan Fruit Tree Project Society
Okanagan Historical Society
Okanagan Humane Society
Okanagan Lifetime Networks Association
Okanagan Regional Library District
Okanagan Symphony Society
Old Friends Canada Society

Oliver Community Arts Council
Opera Kelowna Society
Options for Sexual Health
Orchard City Abbeyfield Society
Pacific Autism Family Centre Foundation
Pathways Abilities Society
Peachland Wellness Centre Society
Project Literacy Central Okanagan Society
Prostate Cancer Foundation BC
Purpl Community Enterprise Accelerator CCC Inc.
Queens University at Kingston
Reach Out Youth Counselling & Services Society
Responsible Animal Care Society
Resurrection Recovery Resource Society
Rotary Centre for the Arts (KVPACS)
Royal Astronomical Soc. of Canada - Okanagan Centre
Salvation Army Kelowna Community Church
Scouts Canada
Seniors Outreach Services Society
Silver Lake Forest Education Society
Society of St Vincent dePaul Okanagan Valley Par Cou
Society of St.Vincent DePaul of Central Okanagan
South Okanagan Rehabilitation Centre for Owls
Special Olympics British Columbia Society
St Andrew's Church
St. Charles Garnier Parish
Starbright Children's Development Centre
Third Space Charity Society
Thompson Okanagan Tourism Foundation
Thompson Rivers University Foundation
Trinity Western University
United Way British Columbia
University of British Columbia
University of Victoria
Variety - The Children's Charity of BC (Tent 47)
Westbank Museum & Arts & Crafts Society
YMCA of Okanagan Association
York University
Young Entrepreneurs of Canada Association

REACHING HOME GRANT RECIPIENTS

Canadian Mental Health Association - Kelowna
Central Okanagan Community Foodbank Society
Journey Home through the City of Kelowna
John Howard Society of Okanagan & Kootenay
Karis Support Society
Kelowna Community Resources
Kelowna Gospel Mission Society
Metro Community
National Society of Hope
New Opportunities for Women (NOW) Canada Society
Okanagan Boys and Girls Clubs
Resurrection Recovery Resource Society
Seniors Outreach Services Society
The Governing Council of the Salvation Army in Can.

For more information please contact us: