

Building for the future



Shuswap Community Foundation 2009 - 2010 Community Report



COMMUNITY
FOUNDATIONS
OF CANADA
for community.



Mission

To provide a vehicle for residents of the Shuswap to enrich their community in perpetuity through a variety of endowed funds;

To disburse the earnings on the capital fund annually to build community capacity and to support charitable projects that will enrich the lives of residents;

To honour and remember the Foundation's donors; and

To assume a leadership role in community philanthropy.

Board of Directors

Front row (l-r)

Cindy Derkaz, (President), Alice Duck, Ralph Segreto, Lois Higgins, Ineke Hughes, Marilyn Brown, Doug Adams (Co-vice president), Dave Wood (Treasurer).

Back row (l-r)

Margaret Chrumka (Secretary), Karen Angove (Co-vice president), Deborah Chapman, Ted Apted

Shuswap Community Foundation

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President's Message

Building for the future

An appropriate theme when we look at Shuswap Community Foundation's first annual report in 1997: capital funds of \$165,000 with \$1600 in scholarships and \$2200 in discretionary grants being returned to the community. As this year's annual report goes to press, the Foundation's permanent capital fund stands at just under \$4 million and distributions will be approximately \$150,000.

It has been a good, even great, beginning. The Foundation is on the way to building a large permanent fund which will provide income for charitable activities in the Shuswap in perpetuity. Just think of where the Foundation could be in another 10, 50 or 100 years!

In August 2009, we took the big step of establishing an office in Salmon Arm and hiring a part-time administrative assistant, Laurie Ankenman. It was a good decision. We have become more efficient and our board has more time to concentrate on the "bigger picture."

Over the past year, donors continued to contribute to existing funds and/or open new funds. One of our new funds is the Eagle Valley Communities Endowment Fund which was established at a reception hosted by the Foundation and the District of Sicamous in May 2010. You will find a list of all Foundation funds to June 30, 2010 in this report.

This fall we will see more changes as directors Lois Higgins and Margaret Chrumka retire. Lois was a charter member of the Foundation and served as chair of our grants committee from the beginning. Margaret has served as board secretary for the past 5 years. Heartfelt thanks to both for all your hard work and dedication! We welcome Bryan Kassa and Joanne Mason to our board.

Finally, I want to thank all our donors and corporate sponsors who believe in the Foundation and continue to provide their generous support. Together we are building for the future.

Cindy Derkaz

June 30, 2010



Families Investing in the Future



Fowler/Gomme Family Endowment Fund

Mary Belle Jean Fowler was born in New Westminster, BC and raised in the Dunbar area of Vancouver. She met Reid Fowler while they were both attending UBC, and they married in 1961. Arriving in Salmon Arm in 1970, with their children, son Malcolm and daughter Norma Jean, Reid taught Math and Physics at Okanagan College until his retirement in 2000, while Mary chose to be a homemaker and work part time in the secretarial field.

She and Reid both learned to play the trombone when their children were in high school, and joined the Salmon Arm Community Band together with daughter Norma. However, Mary's first love was choral music, and she sang with the Shuswap Singers for over 30 years.

With their children actively involved in music during their school years, Mary and Reid became aware of a sub-culture in the world of music, equivalent to that of athletes seeking excellence in their chosen sport. As parents and grandparents of music-loving children, they knew what costs were involved in allowing children to reach their full potential.

With Mary's untimely death in May of 2009, the family chose to honour and commemorate Mary's life by establishing the Fowler/Gomme Family Endowment Fund. Many friends and family donated to the fund, initiated by Reid. Malcolm and his wife Mary-Ann donated in the name of their daughter Meghan, as did Norma Jean & Graham Gomme in the names of their children, Hannah and Reid. The income from the fund will be given each year as a scholarship to Shuswap Music Festival Society, with preference given to excellence in vocal performance.

Please read a full account in Our Stories at www.shuswapfoundation.ca



Turner Orchards Endowment Fund

From the small orchard that existed on the land that young Irish immigrant Robert Turner purchased in 1895, the Turner orchards grew to extend over some 70 acres. Robert discovered and propagated what became famous as the 'Turner Red Delicious', becoming the Red Delicious of choice among growers throughout the Okanagan Valley.

In 1907 Robert married Maude Louise Maguire. They had four children – Edward Charles, Marjorie Eglah, Ronald (Ronnie) Hudson, and Alexander Robert. All the children worked alongside their father in the orchards, and in the packing house. Robert died in 1950, Maude in 1979.

Upon his retirement in 1977, Ronnie returned to Salmon Arm. He is proud of the contribution his family has made to the community over the years. In 1996 he became a Founder of the Shuswap Community Foundation, pleased he was able to help the foundation achieve a solid footing. In November of 2009, Ronnie and his family established the Turner Orchards Endowment Fund, with grants from the fund to be distributed to a non-profit charitable organization in the Shuswap, at the discretion of the Shuswap Community Foundation.

Ronnie's philosophy is 'do the best you can – just carry on.' Today he still sells fruit off the trees on the two acres surrounding his home, including apples from a 90+ year old Wealthy tree at the entrance to his driveway.

Please read a full account in Our Stories at www.shuswapfoundation.ca

New Endowment Funds Established July 1, 2009 to June 30, 2010

- Chapman Family Endowment Fund
- Eagle Valley Communities Endowment Fund
- Henderson Award in International Development Fund
- Higgins Family Endowment Fund
- Marian and Ralph Segreto Endowment Fund
- Shuswap Hut and Trail Alliance Society Endowment Fund
- Shuswap Volunteer Firemen's Association
 - Cody Davies Memorial Bursary
- Jack and Edith Stead Endowment Fund
- Turner Orchards Endowment Fund



Salmon Arm Red Cross Loan Depot Wash Bay

It's important to ensure that medical equipment is properly cleaned and disinfected, and the new wash bay at the Salmon Arm Red Cross Loan Depot allows volunteers to do just that in an efficient manner.



Sorrento Elementary School Playground

With a whole lot of help from their friends, including a grant from the Sorrento Lions - Catherine Dilworth Endowment Fund given at the discretion of the Shuswap Community Foundation, the Sorrento Elementary School Parent Advisory Council brought to fruition the creation of a brand new playground equipment complex.



Shuswap Watershed Project

Funds from the Foundation were used to help produce a Teacher's Resource Handbook, providing study suggestions for students of all grade levels, in support of the Shuswap Watershed Project.

Helping to Build Community



Sicamous Amateur Drama Club

A new dimmer lighting package purchased with a grant from the John and Ingrid Monk Endowment Fund throws a different light on productions held in Sicamous' historic Red Barn Arts Centre.



Shuswap Youth Soccer Association

A grant from the Foundation enabled the association to provide an entry level Young Referees course for ages 12 and up, and helped pay 50% of the cost for those age 14 and older who wished to progress to a higher level. For many young people, being a soccer referee is their first paying job, providing them with a valuable skill set to use in the future.



Sicamous & District Senior's Centre Society

A grant from the John & Ingrid Monk Endowment Fund was used to purchase and install new state of the art appliances in the centre's kitchen, replacing those in use since the centre's inception 30 years ago. The centre's volunteers are "veeery" happy with the new, efficient appliances.



222 Shuswap Royal Canadian Air Cadet Squadron Citizenship Tour of Esquimalt/Victoria

Twenty five cadets, ranging in age from 12-18, participated in tours of CFB Esquimalt, 443 Squadron, the BC Legislature, and Royal BC Museum.



Salmon Arm Children's Festival Society

A generous grant bestowed by the Foundation from the Wainwright-Mobley Memorial Fund provided new climbing equipment for the children's enjoyment at the 2010 Canada Day Festivities. Many local children's entertainers were also on hand to celebrate Canada's 143rd birthday.



Sorrento Food Bank

A grant from the Foundation's General Fund enabled the Sorrento Food Bank to purchase a much needed industrial cooler.

Paul Pukas

Paul Pukas and Elvi Lindgren were married in Golden, and moved to Salmon Arm in 1969, raising their children and establishing a successful business career in the concrete industry. The entire family participated in the business, including Elvi who did the bookkeeping while maintaining the household as well. Paul designed and built a number of processing plants to facilitate the companies' growth, culminating in the building of equipment to produce 'Concrete Top', which consists of concrete bonded to polystyrene board, and a recycling system for the waste. Concrete Top is sold across Canada, appearing on Canada's Parliament Buildings and the 2010 Olympic Sliding Centre in Whistler.

Thanks to Paul's leadership and determination, the nature trail extending from the wharf out to Raven Subdivision was created, an outdoor amenity that both residents and visitors alike enjoy in all seasons.

Paul and his family were very aware of their good fortune in business, and being able to live in "God's Country." When asked to help out local organizations, they rarely said "No."

In 2009, the Paul Pukas family established the Paul & Elvi Pukas Family Endowment Fund with the Shuswap Community Foundation, creating a permanent legacy in remembrance of Paul, who died in July of 2007.

Please read a full account in Our Stories at www.shuswapfoundation.ca



2010 Discretionary Grants

Grant Recipient	Grant	Project	Fund
Kamloops Symphony Society	\$2,000	Concert series in Salmon Arm 2010/2011	Gertrude and Ludwig Klein Memorial Fund and General Fund
Malakwa Community Centre Association	\$6,000	Water and hydro to community park	John and Ingrid Monk Endowment Fund, Lloyd and Dorothy Askew Family Endowment and General Fund
Neighbourlink Shuswap / Second Harvest	\$1,000	New freezer	Paul and Elvi Pukas Family Endowment Fund
North and South Shuswap Community Resources Association	\$2,000	Equipment for Shuswap Lake Estates Playgroup 0-6 years	Sorrento Lions-Catherine Dilworth Memorial Endowment Fund
Okanagan College / Literacy Alliance of the Shuswap	\$1,500	Adult literacy workshops-lifelong learning	Ev Painter Endowment and General Fund
Royal Canadian Air Cadets Sponsoring Committee	\$3,000	Flight simulator and computer for cadet ground school	Youth Endowment, Salmon Arm Savings and Credit Union Youth Endowment and Wainwright-Mobley Memorial Fund
Salmon Arm Bay Nature Enhancement Society	\$5,000	Replace buoys and maintenance	Potter/Edgell Family Endowment, Salmon Arm Savings and Credit Union Community Endowment and General Fund
Salmon Arm Museum and Heritage Association	\$3,500	Develop site plan for Haney Village	Lloyd and Dorothy Askew Family Endowment Fund
School District # 83 / South Broadview Elementary School Parent Advisory Council	\$3,000	Playground replacement	Wainwright-Mobley Memorial Fund
School District #83	\$2,000	Restitution and control theory training	Salmon Arm Schools Legacy Fund and General Fund
Shuswap Association for Community Living	\$2,500	Computers and office equipment	Mary Douhaniuk Memorial Fund and General Fund
Shuswap Community Foundation	\$1,000	Serendipity grants at President's discretion	General Fund
Shuswap Family Resource and Referral Society	\$2,000	Teen parenting support groups	Jennifer Phillips Memorial Fund
Shuswap Hospice Society	\$1,000	Volunteer training course	Seniors Project Fund
Shuswap Hut and Trail Alliance Society / Larch Hills Nordic Society	\$1,500	Rescue toboggan purchase	Derkaz/Derby Family Endowment Fund and General Fund
Shuswap Music Festival Society	\$1,000	2011 Music Festival expenses	Gordon and Bev Marshall Family Endowment Fund and General Fund
Shuswap Theatre Society	\$1,000	Website update	John and Ingrid Monk Endowment Fund and General Fund
Shuswap Volunteer Search and Rescue Society	\$3,500	Equipment and training for volunteers	Wayne Williamson Memorial, Shuswap Coordinating Training Society Endowment and Sorrento Lions-Catherine Dilworth Memorial Endowment Fund
Sicamous and District Senior Centre Society	\$2,500	Help Us Hear Project - new speakers for hall	C. Norman Barber Endowment Fund and General Fund
St. Mary's Church Sorrento, BC	\$1,000	Community ceilidh for 100th Anniversary	Enid Finn Memorial and Old Orchard Farm Endowment Fund
Total Discretionary Grants	\$46,000		



Photos Courtesy of the Salmon Arm Observer

Salmon Arm Secondary Athletic Endowment Fund

When J.L. Jackson Junior High and Salmon Arm Senior Secondary became Salmon Arm Secondary (SAS), the number of school teams increased dramatically, as did the number of students participating. At the same time, school district budgets were being slashed, and other sources of funding were also disappearing. Athletic pursuits are a vital part of the educational experience, and SAS wanted to continue to provide a quality Athletic Program to its students. A Community Athletic Meeting was held in April of 2009, out of which came the creation of a permanent endowment fund that would provide an income in perpetuity to support SAS athletics. The Shuswap Community Foundation is responsible for the administration and disbursement of the funds, and beginning in 2010, will disburse the income generated by the fund to the SAS Athletic Program, in support of extracurricular sports at the Sullivan and Jackson campuses of Salmon Arm Secondary School.

Donations to the fund are tax deductible. Donations of \$1,000 or more will be recognized on a "Builders" plaque to be displayed in Salmon Arm Secondary School.

Please read a full account in Our Stories at www.shuswapfoundation.ca

2010 Donor Directed Grants

Fund	Grant	Recipient/Purpose
Al Neale Bursary Fund	\$2,000	SACSTF* for awards to Kyla Oshaneck and Jesse Oshaneck
Bill MacDonald Memorial Fund	\$375	Earnings retained for future grant
Centennial Reunion Scholarship Fund	\$200	SD # 83 ** award to Selene George
David John Stratton Memorial Bursary Fund	\$400	SD # 83** award to Sergiy Nkaznyy
Elisabeth Thomi Endowment Fund	\$40,223	Earnings to Shuswap Branch BCSPCA
Eve and Christopher Wright Scholarship Fund	\$500	SACSTF* award to Addysen Brush
Fowler/Gomme Family Endowment Fund	\$250	Award at Shuswap Music Festival 2010
Frank and Rita Smuin Memorial Bursary Fund	\$700	SD # 83** award to Desiree Robb
Henderson Award in International Development	\$100	Earnings retained for award commencing 2011
Jack and Edith Stead Endowment Fund	\$100	Earnings retained for grant to Salmon Arm Museum and Heritage Association 2011
Janet Pattinson - Shuswap Naturalist Club Bursary	\$663	To fund the Shuswap Naturalists Bursary
Marie Manson Memorial Art Award Fund	\$1,000	Earnings to SDAC*** award to Scott Crocker
Mary Douhaniuk Memorial Fund	\$1,013	Earnings to Shuswap Hospital Foundation
Morris Bursary Fund for Excellence in Mathematics	\$500	SD # 83** award to Hayley Petznick
Nayki/Greer Family Endowment Fund	\$400	SD # 83** award to Hailey Sewell
Nayki/Greer Family Endowment Fund	\$424	Earnings to Shuswap Branch BCSPCA
Nick and Marilyn Brown Family Fund	\$273	Earnings re-invested in fund
Ready Family Endowment Fund	\$297	Earnings to Shuswap Area Family Emergency Society
Ready Family Endowment Fund	\$297	Earnings to Shuswap Hospice Society
Salmon Arm Kinsmen and Kinette Scholarship Fund	\$1,500	SD # 83** award to Jori Druxbury
Salmon Arm Secondary Athletic Endowment Fund	\$593	Earnings to SD #83** for Salmon Arm Secondary Athletic program
Shuswap Branch BCSPCA Endowment Fund	\$1,459	Earnings to Shuswap Branch BCSPCA
Shuswap Hospital Foundation Fund	\$478	Earnings to Shuswap Hospital Foundation
Shuswap Volunteer Firemen's Association - Cody Davies Memorial Bursary	\$0	New fund established June 2010 for award commencing 2011
Steve Heal Memorial Scholarship Fund	\$300	SD # 83 ** award to Shayna Holmes
Tom Brush Memorial Scholarship Fund	\$500	SD # 83** award to Kim Galbraith
Tomas Idzan Memorial Bursary Fund	\$500	SACSTF* award to Jason Herrington
Walter Ellaschuk Memorial Bursary Fund	\$1,000	SD # 83** awards to Tye-Lynn Nadin and Keith Letendre
Wayne Williamson Memorial Fund	\$167	Earnings to Shuswap Volunteer Search and Rescue Society
Total Donor Directed Grants	\$56,212	

* SACSTF: Salmon Arm College Scholarship Trust Fund **SD # 83: School District # 83 ***SDAC: Shuswap District Arts Council

Tomas Idzan Memorial Bursary

When Debbie and Boris Idzan established a permanent open endowment fund with the Foundation in memory of their son Tomas Idzan, they could not have anticipated that one of Tomas' best friends would one day be the recipient of the bursary provided by the income generated by the fund. This year, at the Okanagan College Scholarship Awards Ceremony at the Salmon Arm campus, a delighted Debbie and Boris presented the award to Jason Herrington, now a mature student in the Residential Construction program. The income from the fund provides financial assistance to adult students wishing to re-enter the educational system, or continue in an up-grading or certificate program, with preference given to those wanting to qualify for a trades apprenticeship. It is disbursed annually by the Trustees of the Salmon Arm College Scholarship Fund. A helping hand reaching into the future.



Photo Courtesy of the Salmon Arm Observer

Please read a full account in Our Stories at www.shuswapfoundation.ca



Family Saturdays downtown at the SAGA Art Gallery

Fun art-making activities for families with children of all ages.

In 2005, a generous grant from the Foundation helped launch this year-round program featuring art-making activities for families with children of all ages. Last year the provincial government made deep cuts to arts organizations, threatening the continuation of this program. Thanks to the ability of the Foundation to be flexible, the grant originally given to help repair and renovate the gallery's bathrooms was diverted to the Family Saturdays program which runs every Saturday at 2pm during the exhibition year.

Drop-In! It's free!

2010 Agency Grants

Fund	Grant	Recipient/Purpose
Anglican Parish of Salmon Arm - Sicamous Endowment Fund	\$530	Earnings to fund holder
City of Salmon Arm Endowment Fund	\$3,085	Earnings re-invested in fund
North Okanagan - Shuswap School District Endowment Fund	\$2,261	Earnings to School District # 83 for scholarships and bursaries
Okanagan College Foundation Fund	\$4,242	Earnings to fund holder
Salmon Arm College Scholarship Trust Fund - George and Nancy Clark Memorial Bursary	\$3,226	Camille Brandt , Mitchel Blais
Salmon Arm College Scholarship Trust Fund - Len O'Neill Memorial Award	\$2,786	Katelyn Turner, Addysen Brush, Claire Benade, Mark Chiminti
Salmon Arm College Scholarship Trust Fund - Vicki Hitchen Memorial Award	\$2,438	Colton Gabert , Brittany Johnston
Salmon Arm Museum and Heritage Association Endowment Fund	\$4,881	Earnings to fund holder
Salmon Arm Museum and Heritage Association Endowment Fund - Peterson Family Fund	\$2,002	Earnings to Salmon Arm Museum and Heritage Association
Shuswap Art Gallery Association Endowment Fund	\$11,934	Earnings to fund holder
Shuswap Community Foundation Administration Fund	\$2,363	Earnings to support administration of Foundation
Shuswap District Arts Council Endowment Fund - Blair Borden Memorial Award	\$1,036	Asha-Pratt Johnson, Joseph Dansereau
Shuswap District Arts Council Endowment Fund	\$1,478	Earnings to fund holder
Shuswap District Arts Council Endowment Fund - Thompson Okanagan Network Arts Council	\$222	Earnings to fund holder for regional meeting
Shuswap Hospice Society Fund	\$1,286	Earnings to fund holder
Shuswap Hut and Trail Alliance Society Endowment Fund	\$33	Earnings reinvested in fund
Total agency grants	\$43,803	



Muriel MacKenzie

MacKenzies' Men's Wear was a fixture on Hudson Street in downtown Salmon Arm for many years. Built in 1947, Earl and Muriel MacKenzie operated the store until Earl's death in 1987.

Earl was active in the community, acting as Scout Master as well as belonging to the Masons and the Kinsman Club. He was proud of his role in the establishment of the Salmar Community Association as a founding member.

Muriel is a member of the K-ettes and is still a member of the Eastern Star organization. Actively involved as a member of the United Church Women's Group, she also continues to enjoy playing golf and bridge.

Salmon Arm has been good to her family and she was happy to be able to contribute to the establishment of the Shuswap Community Foundation. As the grandmother of a 7th generation Canadian she understands the importance of providing for the future. "It was the right thing to do."

Please read a full account in Our Stories at www.shuswapfoundation.ca

Foundation Founders

The Askew Family
 Wendy and Edward Apted
 Muriel and Frank Barnard
 Marcia and Jim Beckner
 Margaret and Sid Bedwell
 Thomas Bowers (In Memoriam)
 Gayle and Jack Bowers
 The Braby Family
 Elsie and Tom Brighthouse
 Sunni Berger and Gary Brooke
 Wendy and Greg Browne
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 Nancy and George Clark
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 Cindy Derkaz and Don Derby
 Nina Dickins
 Margaret and Ernie Doe
 Brooke, Jackson, Downs
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 Ian Duncan
 Mary and Reid Fowler

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 The Letham Family
 The MacKenzie Family
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 Maud and Robert Turner (In Memoriam)
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 Eve and Chris Wright

In Memoriam

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Lloyd Askew
Roger Ayles
Barbara and Marcel Asquin
Muriel Axe
C. Norman Barber
Carol Berger
Del Beckner
William Bews
Blair Borden
Bertha Boswell
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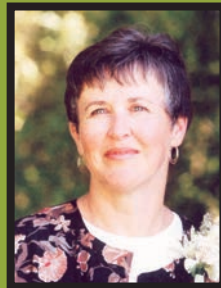
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Richard Walters
Helena Wickett
Dr. Ralph Williams
Wayne Williamson
Chris and Eve Wright



Howard Vander Hoek

A staunch community supporter, Howard served on the Board of Directors of the Salmon Arm Savings & Credit Union for a number of years. In honour of Howard's memory, SASCUC staff and board members made donations to the SASCUC Community Endowment fund.



Heather McConnell

Heather McConnell lived a life of service to her students and her community until her death in 2009. An advocate for the marginalized and oppressed, she worked tirelessly to help others and make Salmon Arm a better place to be.



Enid Finn

Enid gave unstintingly to her community. In return she was honoured by having the earnings from the Enid Finn Memorial Fund support music, especially in the South Shuswap. It would have pleased her to know that her name will be attached forever to the activities and the area she loved.



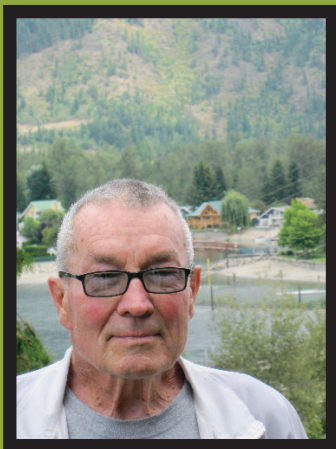
Ray Newnes

A lifelong resident of Salmon Arm, Ray Newnes took over his father's blacksmith shop at the age of 15, building the business until Newnes Machine Ltd. became one of the largest employers in the Shuswap. He was a Founder of the Shuswap Community Foundation.



Gordon Priestman

Always deeply concerned with matters of social justice, Gordon inspired the creation of the "Friends of Okanagan College" trust which led to the establishment of the extremely successful Salmon Arm College Scholarship Fund— until recently the largest agency fund held by the Shuswap Foundation.



Dave Williamson

Dave Williamson and his wife Joan (now deceased) arrived in Sicamous in 1964, purchasing and developing resort properties on the shores of Mara Lake. He was active with the Sicamous Chamber of Commerce and served as a director with the CSRD.

In the mid-1970s, disappointed with the failure of a referendum held to establish a public beach in Sicamous, Dave, together with Gordon Mackie, John Monk, and Peer Paynter arranged to borrow enough money from the Bank of Montreal to purchase six acres of waterfront property. They then created and built Sicamous Beach Park with a lot of help from their friends. Dave is proud of having been instrumental in the creation of this legacy for the citizens of Sicamous.

Dave was in the crowd when Shuswap Community Foundation made a presentation in Sicamous in May, 2009. A forward thinking fellow, he believes strongly in building and supporting community, so the foundation's message of building community through philanthropy appealed to him. He and his wife Jean made a substantial donation to help establish the Eagle Valley Communities Fund with the Shuswap Community Foundation. When donations to the fund reach \$10,000 and beyond, the income earned by the fund will be given back to the community annually, in perpetuity, at the foundation's Annual Community Meeting held each year in September.

Please read a full account in Our Stories at www.shuswapfoundation.ca

2009-2010 Foundation Donors

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 Brenda Dyck Forestry Consulting Ltd
 City of Salmon Arm
 Don Schmok Property Appraisals
 Eagle Valley Kinette Club
 Lakeside Insurance Services
 Magic Moments
 Promo Smart Promotional Products Inc
 Salmon Arm Downtown Improvement Association
 Salmon Arm Savings and Credit Union
 Salmon Arm Secondary School
 Shanto Dental Ceramics
 Shuswap District Arts Council
 Shuswap Art Gallery Association
 Shuswap District Arts Council
 Shuswap Hut & Trail Alliance
 Shuswap Volunteer Firemen's Association
 South Broadview Elementary Staff

Foundation Builders

Higgins

Lois and Harry Higgins have been in Salmon Arm for over thirty years. Their three children, Robin, David and Bill all grew up here. Harry was a school administrator, including sixteen years as principal of J.L. Jackson Sr. Secondary School. Lois was one of the founders of the Shuswap Community Foundation and as chair of the Grants Committee since the beginning, realizes how important nondiscretionary funds are for meeting the changing needs of the community.



Henderson

John and Joyce Henderson brought their family to the small community of Salmon Arm in 1964. They became involved in international health and community development while volunteering in Kenya during the mid-1970s. The establishment of the Henderson Award in International Development Fund perpetuates their vision of a safer, healthier life for disadvantaged people around the world. The income from the fund will be given each year to a student recommended by the Faculty of Health and Social Development at UBC Okanagan.

Segreto

Ralph and Marian Segreto understand the value of building community vitality, and recognize the importance of providing financial support to the community's non profit charitable organizations as a means of achieving that goal. Their discretionary family endowment fund will provide a grant annually at the discretion of the foundation. Ralph manages the TD Canada Trust Bank in Salmon Arm, and has been a director with the foundation since its inception. Marian taught at South Broadview Elementary for 22 years.



Stead

Members of the Shuswap community since 1981, Jack and Edith Stead have a passion for recording and preserving where we come from. When they learned they could establish an endowment fund with the foundation, and get a tax receipt too, they set up the Jack and Edith Stead Endowment Fund naming the Salmon Arm Museum and Heritage Association as the beneficiary of the income generated by the fund annually, in perpetuity.

Molly Bell

When Molly Bell learned that she could contribute the funds to open the Shuswap Hut and Trail Alliance Society Endowment Fund, she did so without hesitation. Molly believes in keeping her charitable donations local. Tax deductible donations to the fund are welcome at any time, and income generated by the fund, after it reaches \$10,000, will be given to the Alliance to be used to further the Alliance's mission of creating, maintaining and promoting greenways and outdoor recreation in the Shuswap.



Permanent Capital Fund

Funds

Community:	2010	2009
Doug and Donna Adams Family Endowment	\$3,097	\$1,000
Lloyd and Dorothy Askew Family Endowment	\$166,097	\$162,152
C. Norman Barber Endowment	\$45,000	\$45,000
Browne Johnson Legacy	\$51,679	\$33,949
Chapman Family Endowment	\$1,000	\$0
Derkaz/Derby Family Endowment	\$25,355	\$23,474
Eagle Valley Communities Endowment	\$2,750	\$0
General	\$360,068	\$349,711
Higgins Family Endowment	\$7,500	\$0
Gordon and Bev Marshall Family Endowment	\$10,720	\$10,720
John and Ingrid Monk Endowment	\$76,312	\$61,312
Paul and Elvi Pukas Family Endowment	\$30,000	\$25,000
Marian and Ralph Segreto Endowment	\$5,100	\$4,100
Shuswap Coordinating Training Society Endowment	\$39,000	\$39,000
Turner Orchards Endowment	\$13,000	\$0

Field of Interest:

Mary Douhaniuk Memorial	\$45,500	\$45,500
Enid Finn Memorial	\$8,158	\$7,273
Gertrude and Ludwig Klein Memorial	\$36,915	\$30,415
Old Orchard Farm Endowment est. by Dr. Melany Dyer and Margot Hewitt	\$11,776	\$11,529
Ev Painter Endowment	\$14,000	\$13,000
Jennifer Phillips Memorial	\$47,155	\$45,958
Potter/Edgell Family Endowment est. in Memory of Muriel Axe	\$15,000	\$10,000
Salmon Arm Savings and Credit Union Community Endowment	\$31,500	\$10,000
Salmon Arm Savings and Credit Union Youth Endowment	\$13,000	\$13,000
Salmon Arm Schools Legacy	\$15,151	\$15,151
Seniors Project	\$20,419	\$20,419
Sorrento Lions - Catherine Dilworth Memorial Endowment	\$75,451	\$75,451
Wainwright-Mobley Memorial in Memory James Ross Wainwright, James Howard Wainwright, Maj. Charles Wm and Laura Mae Mobley, Ruby and Howard Mobley and Bertha Boswell	\$126,852	\$118,776
Youth Endowment	\$12,024	\$12,024

Dedicated Funds

Donor Directed:

Nick and Marilyn Brown Family	\$7,480	\$5,626
Tom Brush Memorial Scholarship	\$11,693	\$11,693
Centennial Reunion Scholarship	\$5,367	\$5,367
Mary Douhaniuk Memorial	\$24,500	\$24,500
Walter Ellaschuk Memorial Bursary	\$25,100	\$25,100
Fowler/Gomme Family Endowment	\$17,531	\$15,336
Steve Heal Memorial Scholarship	\$11,282	\$11,282
Henderson Scholarship Award in International Development	\$10,000	\$0
Tomas Idzan Memorial Bursary	\$10,474	\$10,474
Salmon Arm Kinsmen and Kinetite Scholarship	\$32,877	\$32,877
Bill MacDonald Memorial	\$7,804	\$7,504
Marie Manson Memorial Art Award	\$26,162	\$26,162
Morris Bursary for Excellence in Mathematics	\$12,055	\$10,000
Nayki/Greer Family Endowment	\$22,948	\$18,456
Al Neale Bursary	\$66,724	\$57,924
Janet Pattinson - Shuswap Naturalist Club Bursary	\$16,723	\$16,173
Ready Family Endowment	\$14,320	\$14,220
Salmon Arm Secondary Athletic Endowment	\$19,285	\$10,000
Shuswap Branch, B.C.S.P.C.A. Endowment	\$36,365	\$34,215
Shuswap Hospital Foundation	\$10,264	\$8,730
Shuswap Volunteer Firemen's Association - Cody Davies Memorial Bursary	\$11,941	\$0
Frank and Rita Smuin Memorial Bursary	\$16,100	\$16,100
David John Stratton Memorial Bursary	\$10,226	\$10,226
Jack and Edith Stead Family Endowment	\$10,000	\$0
Elisabeth Thomi Endowment	\$984,122	\$984,122
Wayne Williamson Memorial	\$3,242	\$3,242
Eve and Christopher Wright Scholarship	\$10,996	\$10,996

Agency:

Administration Endowment - Shuswap Community Foundation	\$57,510	\$57,487
Anglican Parish of Salmon Arm - Sicamous Endowment	\$13,017	\$13,017
City of Salmon Arm Endowment	\$79,860	\$70,142
North Okanagan-Shuswap School District Endowment	\$53,835	\$53,835
Okanagan College	\$100,000	\$100,000
Salmon Arm College Scholarship Trust - George & Nancy Clarke	\$77,340	\$77,340
Salmon Arm College Scholarship Trust - Vicki Hitchen Memorial	\$57,900	\$57,900
Salmon Arm College Scholarship Trust - Len O'Neill Memorial	\$68,656	\$68,496
Salmon Arm Museum and Heritage Association Endowment	\$119,288	\$119,188
Salmon Arm Museum and Heritage Association - Peterson Family	\$48,910	\$48,910
Shuswap Art Gallery Association Endowment	\$288,756	\$287,206
Shuswap District Arts Council Endowment	\$36,575	\$34,875
Shuswap District Arts Council Endowment - Blair Borden Memorial	\$25,274	\$25,274
Shuswap District Arts Council Endowment - Thompson Okanagan Network Arts Council	\$5,363	\$5,026
Shuswap Hospice Society Endowment	\$31,300	\$31,300
Shuswap Hut and Trail Alliance Society Endowment	\$2,000	\$0

Total Discretionary Funds	\$1,309,579	\$1,183,914
Total Dedicated Funds	\$2,501,165	\$2,420,321

Total Capital Fund	\$3,810,744	\$3,604,235
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2010 Financial Report

Statement of Financial Position

Assets

	2010	2009
Current assets		
Cash & cash equivalents	\$ 254,016	\$ 322,394
Accounts receivable	27,951	24,525
	281,967	346,919
Investments at market	3,709,764	3,286,633
	\$3,991,731	\$3,633,552

Liabilities & Fund Balances

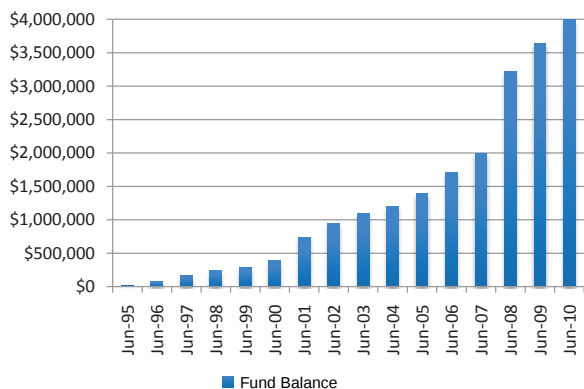
	2010	2009
Current liabilities		
Grants and accounts payable	\$ 2,344	\$ 2,228
Accrued income receivable	11,350	10,400
Funds held for third parties	8,269	5,954
	21,964	18,582
Fund balances		
Endowment funds	3,961,095	3,606,298
Unrestricted assets	8,672	8,672
	3,969,767	3,614,970
	\$3,991,731	\$3,633,552

Statement of Revenue & Expenses & Changes in Fund Balances

	Endowment Fund		Administration Fund		City of SA Trust Fund		Total	
	2010	2009	2010	2009	2010	2009	2010	2009
Revenue								
Investments Income (note 1)	\$ 316,820	\$ 77,014	\$ -	\$ -	\$ 71	\$ 123	\$ 316,891	\$ 77,137
Administration Fee	-	-	36,944	-	-	-	36,944	-
Donations	204,914	441,825	20,946	18,886	50,000	45,000	275,860	505,711
	521,734	518,839	57,890	18,886	50,071	45,123	629,695	582,848
Operational Expenses								
Administration	36,944	-	45,133	18,002	-	-	82,077	18,002
Excess revenue over expenses before grants	484,790	518,839	12,757	884	50,071	45,123	547,618	564,846
Life insurance costs	2,600	1,500	-	-	-	-	2,600	1,500
Grants	127,393	114,309	-	-	47,756	44,113	175,149	158,422
	129,993	115,809	-	-	47,756	44,113	177,749	159,922
Excess of revenue over expenses (expenses over revenues) for the year	354,797	403,030	12,757	884	2,315	1,010	369,869	404,924
Fund balances beginning of year	3,606,298	3,203,268	8,672	7,788	5,954	4,944	3,620,924	3,216,000
Fund balances end of year	\$3,961,095	\$3,606,298	\$ 21,429	\$ 8,672	\$ 8,269	\$ 5,954	\$3,990,793	\$3,620,924

An unreviewed summary of the Shuswap Foundation's financial position at June 30, 2010

Capital Fund Growth Between 1995 and 2010



Notes to Financial Statements

	2010	2009
Investment income earned during year		
Interest and Dividends	\$ 174,069	\$ 169,339
Realized gains/(losses)	5,776	16,635
Unrealized gains/(losses)	136,184	(90,778)
Life Insurance	791	(18,182)
	\$ 316,820	\$ 77,014
Investment income City of Salmon Arm Trust		
Interest	\$71	\$123

An unreviewed summary of the Shuswap Foundation's financial position at June 30, 2010

To view full Financial Statements please go to www.shuswapfoundation.ca/pub

2010 Shuswap Community



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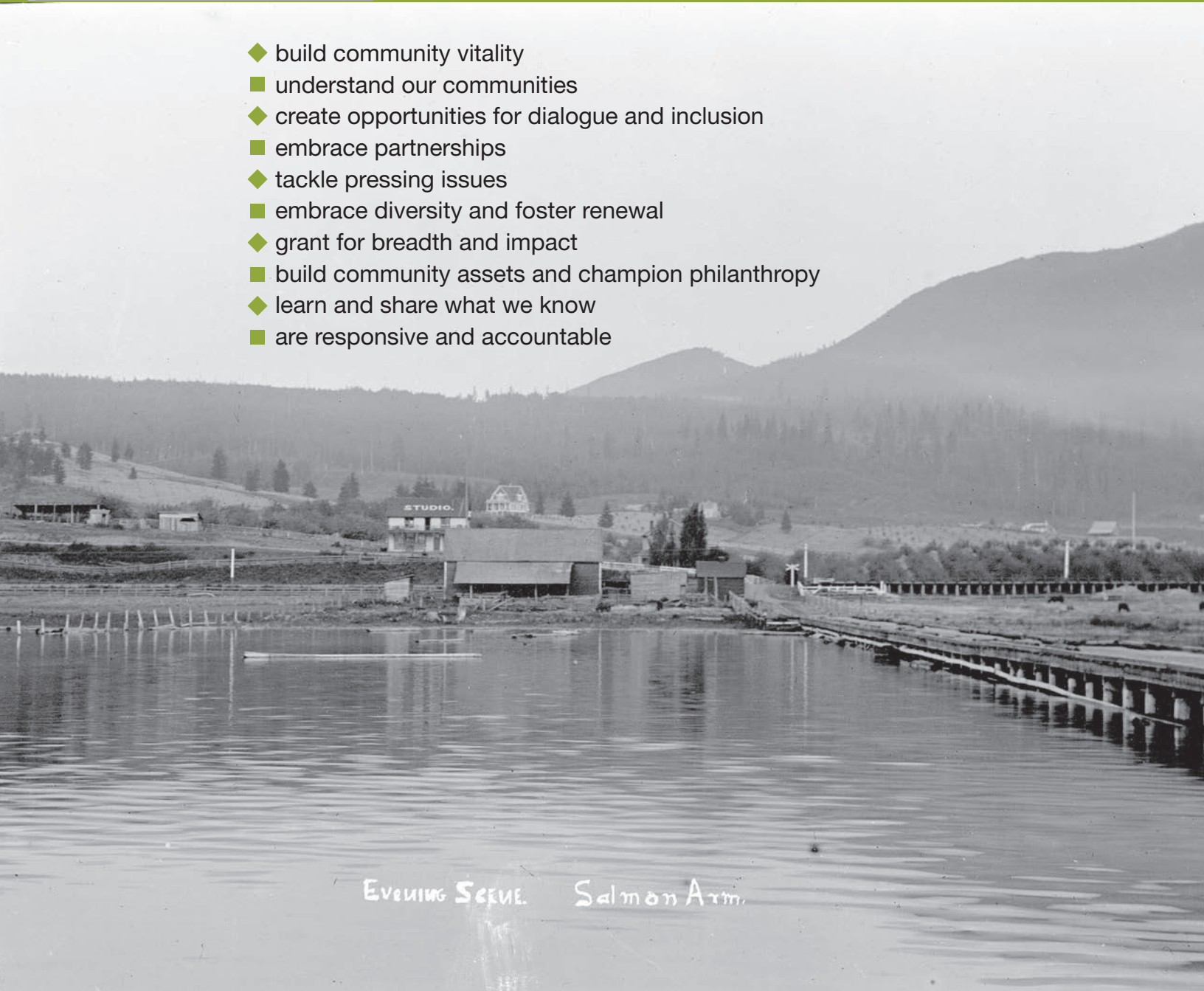


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Barristers – Solicitors – Notaries Public
Established 1912

Ian D. Johnson
BA, MEd. Counselling Psychology

What Community Foundations Do:

- ◆ build community vitality
- understand our communities
- ◆ create opportunities for dialogue and inclusion
- embrace partnerships
- ◆ tackle pressing issues
- embrace diversity and foster renewal
- ◆ grant for breadth and impact
- build community assets and champion philanthropy
- ◆ learn and share what we know
- are responsive and accountable



EVENING SCENE. Salmon Arm.



Front Cover Photo Credit:
Frank Duncan, photographer
Hotel Belleville, Sicamous
Circa 1913-1915

Back Cover Photo Credit:
Rex Lingford, photographer
Evening Scene Salmon Arm
Circa 1909-1914

Historic photos courtesy of the Salmon Arm Museum and Haney Heritage Village

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