



ANNUAL REPORT 2020

The Community Foundation of the North Okanagan is a grant making charitable organization, dedicated to improving the lives of people in our community. We bring together the financial resources of individuals, families, and businesses to support effective non-profits across the North Okanagan region. Over the past 45 years, we have proudly distributed over \$7 million in grants, to help build stronger and more resilient communities.



Our 2020 Rapid Response Strategy

THIS WAS A YEAR OF COLLECTIVE ACTION. The Community Foundation of the North Okanagan (CFNO) is incredibly proud of those who rallied together to support us through donations, volunteerism, partnerships, and guidance. We engaged in funding partnerships and new initiatives to create a program of action to support those hardest hit by the COVID-19 pandemic.

We were designed to financially endure times of crisis and to be a reliable source of leadership & grant support to non-profits across the region. It is during these difficult times, we want to reassure you that we will continue to support our partners, grantees, donors, and communities in whatever way we can. We also want to reassure you that

we have prepared our investment portfolio to withstand changes in the global economy. This includes more diversification, lower risk, and more defensive investments. We are confident in the expertise of our Investment Advisors and in the measures we've taken to ensure our investment portfolio will generate sustainable granting income for the community in the years to come.

This report was prepared to show a snapshot of what we accomplished in 2020, how we pivoted our funding to impact the greatest needs that emerged early in the year, and how we continued to provide the reliable support organizations have come to depend upon.

As the pandemic unfolded in March, our compassionate donors

reached out to us requesting a way to contribute to organizations and programs being hardest hit by COVID-19. We started the BETTER TOGETHER - COVID-19 Community Response Fund, to provide relief funding. We have also been able to leverage government funding and work cooperatively on other funding initiatives to boost help to the charitable sector and the myriad causes our community depends on.

CFNO is dedicated to improving the quality of life in our community - *now and for future generations.*



Herb Wong
Board Chair



Leanne Hammond
Executive Director



\$1 million+

in funding deployed through various programs to charities throughout the North Okanagan

BETTER TOGETHER - COVID-19 Community Response Fund

It is a normal response to want to help in a time of crisis. Our donors have helped us provide immediate support through this non-endowed rapid response funding option. We continue to work with the Social Planning Council, service agencies, and other funders to provide help in any way we can. *We are BETTER TOGETHER!*

granted:
\$150,000

SMART & CARING COMMUNITY FUND

Through continued support of the Smart & Caring Community Fund, many donors have empowered responsive grantmaking that addresses a wide variety of ever changing social, cultural, educational, and environmental needs. This year we have been able to distribute over \$108,000 to local charities, many of whom had to change their delivery models overnight to continue to serve our community.

granted:
\$108,500

leveraged:
\$16,000
(from a gift made through the Vancouver Foundation)

EMERGENCY COMMUNITY SUPPORT FUND

In partnership with the Government of Canada, Community Foundations of Canada, United Way and the Canadian Red Cross - a source of rapid response funding has been made available to support organizations working with vulnerable populations impacted by the COVID-19 crisis. CFNO has worked hard to get this funding out to our local charities and non-profit organizations that are tirelessly supporting our vulnerable population.

granted:
\$140,000

leveraged:
\$61,000
(in funding partnerships)

INVESTMENT READINESS PROGRAM - program funding

The Investment Readiness Program supports social purpose organizations as they contribute to solving pressing social, cultural, and environmental challenges. The program is funded by the Government of Canada. We collaborated with community foundations in the Central and South Okanagan to deliver this unique and innovative funding program to help social enterprises explore, grow, and flourish.

granted:
\$280,000

SUSTAINABLE RECOVERY PARTNERSHIP - program funding

The COVID-19 pandemic has significantly impacted the non-profit sector and this funding stream responds directly to emerging and shifting sustainability needs of charities and social enterprises. Grants provide coaching and support focused on resilience and recovery in four key areas: revenue, operations, people, and impact. This grant program is a partnership with United Way, Interior Savings Credit Union, Valley First Credit Union, Community Foundation of the South Okanagan and Purppl Social Enterprise Accelerator.

granted:
\$20,000

leveraged:
\$100,000
(program contributions)

2020 Highlights

\$18m

total assets

188

total number of endowment funds

\$470,900

grants distributed from
designated & donor advised funds

\$1,070,900

in grant funding to local charities

+79,500 grants

(made by Community Foundations of Canada)
to charities in our area

\$108,500

in responsive grants from the
Smart & Caring Community granting program

100+

local charities supported

Every young person deserves a comfortable, safe, and affordable home.

For youth in foster care, an eighteenth birthday means leaving your home and familiar support network behind. Ready or not these youth are pushed into adulthood and expected to find housing, get a job, go to school, and begin to navigate a new system of scarce resources.

To ease some of the stress young people experience by aging out of the foster care system, the Vernon Native Housing Society (VNHS) has provided five studio apartments for youth leaving care. In partnership with a grant from the Community Foundation, VNHS has been able to fully furnish the suites and welcome youth into comfortable new homes of their own. The suites have been outfitted with all the essentials - a bed, couch, dining table set, and kitchen cooking essentials.

The apartments are located in Thunderbird Manor, a brand new affordable housing complex operated by VNHS in downtown Vernon. The building has 37 low-



income units, five of which are for youth aging out of the foster care system. Providing young people with stable housing enables them to succeed in their future plans of going to school or getting a job.

Annette Sharkey

Incoming Board Vice-Chair,
Community Foundation
North Okanagan



A TRUE COMMUNITY CHAMPION, Annette Sharkey is leading countless community projects and partnerships in the North Okanagan. As the Executive Director of the Social Planning Council for the North Okanagan, Sharkey instigates change at the community level. She has a deep knowledge of the sector, and of the people and organizations needed to implement community-level strategies.

In March, it was Sharkey's suggestion to reach out to each applicant to ask how the pandemic had impacted their priorities and programs. Her guidance helped the Foundation implement our

Rapid Response Strategy and her expertise helped us to take on new funding programs and partnerships that helped us to distribute over \$1 million dollars in a year that we were concerned about how we would grant at all.

Sharkey's daily work on homelessness, equality, housing, and other social challenges makes her a valuable member of the Foundation's leadership team. We are excited to see Annette move into the role of Vice-Chair for 2021. Her level of caring and compassion inspires us all.



Thank You For Giving

We thank each of our new and existing donors for placing your trust in us to effectively manage and steward these funds.

Smart & Caring Community Funds

Al Roos Endowment Fund
 Anonymous Fund “A”
 Beatrice Perry Memorial Fund
 Brenda Semple Memorial Fund*
 Bryson McKay Whyte & Maude Beatrice Whyte Memorial Fund
 Community Health Endowment Fund
 Doreen & Jack Gordon Endowment Fund
 Dorothy May Myatt Endowment Fund
 Emma & Archibald Gregory Family Fund
 G V Rogers Memorial Fund
 Green Family Fund
 Huston Family Endowment Fund
 Joe & Gwen Brown Endowment Fund
 Keith & Trish Allan Family Fund
 Lloyd Davies & Janet Armstrong Endowment*
 Mary Warder Merryfield Endowment Fund
 Millicent M. Foster Endowment Fund
 Muriel Mildenerger Fund*
 Murray & Elva Gee Fund
 Nixon Wenger Endowment Fund
 Norman Alexander Gillis Endowment Fund
 Norman Mackie Simon Endowment Fund
 North Okanagan Cancer Prevention Fund
 North Okanagan Duplicate Bridge Club Endowment Fund
 Patricia Delma Edbom Endowment Fund
 Patrick F. Mackie Endowment Fund
 Pauline Legg Endowment Fund*
 Peter Leahy Memorial Fund*
 Petra Emmi Heaton Memorial Fund*
 R & G Hamilton Family Endowment
 Richard John Farmer Memorial Fund

Rick Balfour Memorial Fund
 Robert Barclay McClelland Endowment
 Robert Duncan McLean Endowment Fund*
 Smart & Caring Community Fund
 Stewart Alexander Fraser Endowment Fund
 Sydney Frederick Ward Memorial Fund*
 Thomas Mellish Memorial Fund
 Weatherill Family Fund
 William A. Irwin Endowment Fund*
 Winnifred R. Steel Endowment Fund
 Women to the Power of 10 Fund
 Youth VIP Committee Fund

Donor Advised Funds

Bill & Muriel Townsend Fund
 CCM Stewart Family Trust
 Chapman Family Fund
 Dorothy & John Graham Gift Fund
 Edna, Stella and Harry Weatherill Foundation
 Emily Dahl Foundation
 Galbraith Family Endowment Fund
 GALS Endowment Fund
 Gord & Linda Ball Fund
 Mike & Jean Haug Endowment Fund
 Paul Dockstader Foundation
 Saving Grace Foundation
 SilverStar Play It Forward Fund
 SSS Sestrap Endowment Fund

Term Endowments Spend Down Funds

Finch Family Fund
 Popowich Family Fund - 1
 Galbraith Family Flow Through Fund
 Anonymous Fund “A” Flow Through Fund

Designated Funds

Agnes Sovereign Memorial Fund
 Armanious Family Endowment Fund
 Dr. Arthur Sovereign Memorial Fund
 Art Sovereign Pediatric Fund
 Aubrey Creed St. John Fund
 Beatrice I. Perry Endowment Fund
 Beth Melvin Memorial Fund
 Blankley Family Memorial Fund
 Brenda Semple Memorial Fund
 Caroline Galbraith Cancer Fund
 Caroline Galbraith Endowment Fund
 Dante Darkazanli Memorial Fund
 Doreen Abbott-Smith Endowment for Healthcare Fund
 Dorothy Myatt Endowment for Healthcare Fund
 Elizabeth Dubray Memorial Fund for Healthcare
 Ellison Family Endowment Fund
 Fernande Deltenre Endowment Fund
 Festival of the Arts Fund
 Florence Ellen Robey Endowment for Healthcare
 Gardner Ross Hardman Endowment Fund
 Henry & Mae Wong Endowment Fund
 Herbert & Frieda Drauzburg Endowment Fund
 Interior Eyecare Society Fund
 James Frederick Roh Endowment
 Joan James Memorial Fund for Cancer Care
 John Shephard Museum Fund
 John Victor Harrison Fund
 Justice Peter D. Seaton Memorial Bursary Fund
 Lyle & Darlene Lewis - VJH Cancer Clinic Endowment Fund
 Lyle & Darlene Lewis - VJH Cardiac Care Endowment Fund
 Lyle & Darlene Lewis VJH Ultrasound Endowment Fund

Marion Adeline Read Endowment Fund
 Mark & Isabel Rose Endowment Fund
 Martin Goble Memorial Fund for Healthcare
 Mary Richardson Memorial Endowment Fund
 Maureen Bryant Endowment Fund
 Muriel Mildenerger Fund*
 Norman Frederick Kennedy Endowment Fund
 Okanagan Musicians Endowment Fund
 Pauline Legg Endowment Fund*
 Peter George Legg Endowment Fund
 Robert Barclay McClelland Endowment for Healthcare Fund
 Robert D. McLean Diabetic Daycare Fund
 Sharon Billie Memorial Fund
 Stewart Fraser Healthcare Fund
 Sveva Caetani Memorial Endowment Fund
 Walter & Jiraporn Henckel Endowment Fund
 William A. Irwin Endowment Fund*
 William Seibt Fund for Healthcare
 Xel & Cora Monsees Endowment Fund
 Yoshitaka Mori Memorial Fund

Scholarship Funds

A.A. and I. Gray Scholarship Fund
 Ailsa Edge Memorial Fund
 Archibald McKellar MacMechan Scholarship Fund
 Blueliners Association Fund
 Bradley Haslam Memorial Fund
 Cherryville Community Club Bursary Fund
 Class of '69 Scholarship Fund
 D.S. MacKay Scholarship Fund
 David Jones Memorial Drama Fund
 Dr. Vic Demetrick Memorial Scholarship Fund
 Elizabeth Scott Vocal - Choral Bursary Fund
 Funtastic Sports Society Fund
 Herbert LaFontaine Memorial Scholarship Fund
 HI Masters Bursary Fund
 James & Anne-Marie Kanester Fund in honour of Cliff & Lillian Kanester
 Jeff Thorlakson Memorial Scholarship Fund
 Jim & Elizabeth Kidston Memorial Scholarship Fund
 Jo Ellen Foster Memorial Fund

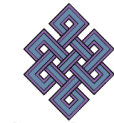
Joel Balfour Memorial Scholarship Fund
 Junior Chamber International - Vernon Fund
 Kalamalka Award Program Endowment Fund
 Kara Hintz Memorial Scholarship Fund
 Karen Bedard Memorial Scholarship Fund
 Kerry Palmer Memorial Bursary Fund
 Kieran Galbraith Memorial Fund
 Klaus & Elisabeth Uhle Fund
 Leah Dayboll Memorial Scholarship Fund
 Lloyd Davies & Janet Armstrong Endowment*
 Lumby Minor Hockey Scholarship Fund
 Lumby Women's Institute Scholarship Endowment Fund
 Manke Gowan Bursary Fund
 Marika Kirchpennig Scholarship Fund
 Michael Ludwig Memorial Scholarship Fund
 Okanagan College Endowment Fund
 Okanagan Landing Volunteer Firefighters (1975-2012) Legacy Fund
 Pat & Gladys Duke Memorial Scholarship Fund
 Peter Isman Scholarship Fund
 Peter Leahy Memorial Fund
 Petra Emmi Heaton Memorial Fund
 Reay O'Rourke Memorial Scholarship Fund
 Robert Duncan McLean Endowment Fund
 Ron Hlady Memorial Scholarship Fund
 Ruth Blencoe Memorial Fund
 School District #22 Vernon Scholarship Trust Fund
 Silver Star Rotary Education Fund
 Simon Fraser University -Science Scholarship Fund
 Smith Family Scholarship Fund
 Syd Dalzell Memorial Scholarship Endowment Fund
 Sydney Frederick Ward Memorial Fund*
 Tom Frame Memorial Fund
 Vernon Community Singers - Molly Boyd Scholarship Fund
 Vernon Motor Dealer's Association Fund
 Vernon Secondary Alumni Scholarship Fund
 Vernon Welsh Society Music Scholarship Fund
 William Seaton / Kin Memorial Scholarship Fund

Charitable Agency Funds

Abbeyfield House of Armstrong Spallumcheen Society Fund
 Allan Brooks Nature Centre Endowment Fund
 Archway Society for Domestic Peace (formerly Vernon Women's Transition Centre Society Fund)
 Armstrong Spallumcheen Museum & Arts Endowment Fund
 Boys & Girls Club Okanagan - Vernon Fund
 Eagle Bay Camp Fund
 Greater Vernon Museum & Archives Endowment Fund
 Kingfisher Interpretive Centre Endowment Fund
 Mackie Lake House Endowment
 North Okanagan Hospice Society Fund
 North Okanagan Hospice Society Garden Fund
 O'Keefe Ranch and Interior Heritage Society Fund
 Okanagan Regional Library Endowment Fund
 Okanagan Symphony Society Fund - Vernon Branch
 Salvation Army - Vernon Branch Fund
 SPCA Endowment Fund
 St. John Ambulance Endowment Fund
 St. Vincent Foster Parent Association Endowment Fund
 Sustainable Environment Network Fund
 Trinity United Church Special Gifts Committee Fund
 Turning Points Collaborative Society Endowment Fund
 United Way Southern Interior BC Fund
 Vernon Community Music School Endowment Fund
 Vernon Community Music School Scholarship Fund
 Vernon Jubilee Hospital Foundation Endowment Fund
 Vernon Jubilee Hospital Foundation Vision Fund
 Vernon Performing Arts Centre Endowment Fund
 Vernon Public Art Gallery Endowment Fund
 Vernon Restholm Association Endowment Fund
 Westside Response Services Fund

*these funds support Smart & Caring Responsive Grants, and other chosen beneficiaries

The Emily Dahl Foundation



The Emily Dahl Foundation

Emily taught us that all along there was something tremendous within us, and we did not realize it.

CARE, COMPASSION, AND LOVE is at the core of the Emily Dahl Foundation.

To dedicate and celebrate the kindness and empathy Emily gave to others in her short time here, her family and friends created this Foundation.

The Foundation will provide granting support to mental health initiatives for people of all ages.

To find out more, visit: <https://emilydahl.foundation>



Community Grants

Thanks to the collective support of donors, partnerships, and programs we gave over \$1 million in funds to hundreds of local charitable organizations.

Smart & Caring Community Grants Program

- Abbeyfield Houses of Vernon Society
- Armstrong Spallumcheen Museum & Arts Society
- Armstrong Spallumcheen Trails Society
- BrainTrust Canada
- Canadian Mental Health Association - Vernon
- Cherryville Community Food Bank
- Cops for Kids
- Cycling Without Age
- Good Samartan - Herons Grove
- Independent Living Vernon Society
- John Rudy Health Resource Centre
- Kindale Development Association
- North Okanagan Artists Alternative (Gallery Vertigo)
- Tetra Society Vernon Chapter
- Vernon Adaptive Society
- Vernon Native Housing*
- Vernon Rowing & Dragon Boat Club
- White Valley Community Resources Centre

Emergency Community Support Fund

- Abbeyfield Houses of Vernon Society
- Allan Brooks Nature Centre Society
- Archway Society for Domestic Peace
- BC SPCA
- Boys & Girls Clubs Okanagan
- Cherryville Foodbank
- FED- Enderby Foodbank
- First Baptist Church Vernon
- Independent Living Vernon

- John Rudy Health Resource Centre
- Launch Okanagan -Financial Literacy Foundation
- Literacy Society North Okanagan
- NONA - N.O. Neurological Association
- People Place Society
- Roots of Empathy - SD #83
- Schubert Centre

BETTER TOGETHER COVID-19 Community Response Fund

- Archway Society
- BrainTrust Canada
- Canadian Mental Health Association - Vernon*
- Community Dental Access Centre
- East Hill Community Church
- Enderby & District Community Resource Centre
- Good Food Box
- Habitat for Humanity
- HOPE Outreach*
- Independent Living Vernon
- Kindale Development Association
- Let's Talk Science
- NexusBC Community Resource Centre
- North Okanagan Friendship Centre
- Salvation Army North Okanagan*
- Spinal Cord Injury
- Vernon & District Land Trust
- Vernon Public Art Gallery
- Vernon Upper Room Mission*
- White Valley Community Resources Centre

Investment Readiness Program

- BrainTrust Canada
- Clubhouse Childcare Centre
- Community Dental Access Centre
- Do Some Good
- Elevation Outdoors
- OneSky Community Resources

Sustainable Recovery Partnership

- IndigenEYEZ
- HOPE Outreach
- Kelowna Women's Shelter
- Okanagan Fruit Tree Project
- South Okanagan Recope Society
- Venture Training

*received 2 grants for different programs

Create Your Own Fund In three easy steps



Step 1:

Determine the causes most important to you

What are the charitable interests you and your family hold close?
Arts, Education, Environment, Health & Recreation, Housing, Social Services.

Do you want to direct a portion of grants to a responsive-grantmaking program?

Would you like to start a scholarship or support a specific charity?

Reach out to us! We can help guide you towards your charitable goals.

Step 2:

Select a flexible fund option

Designated Funds allow donors to choose a favourite charity or charities to benefit not just once, but every year in perpetuity.

Donor Advised Funds offer you the flexibility to support the charities and causes you care about most. You can direct grants throughout your lifetime and create a granting plan for the future.

Smart & Caring Community Funds are a flexible way to support ever changing community needs. Leave the grantmaking up to our granting committee knowing that applications are thoroughly assessed based on emerging community priorities.

Term Endowments (Spend Down Funds) target a specific cause and donate over a specific period of time. Suitable for donors who want to make an immediate impact or a significant difference over a compressed timeline.

Step 3:

Grant from Your Fund

Depending on your interests you can have as little or as much involvement as you want in the grantmaking process.

You can support any registered Canadian charity or you can leave the decision making to the expert advisors on the grant committees.

57

Grants from Designated & Donor Advised Funds

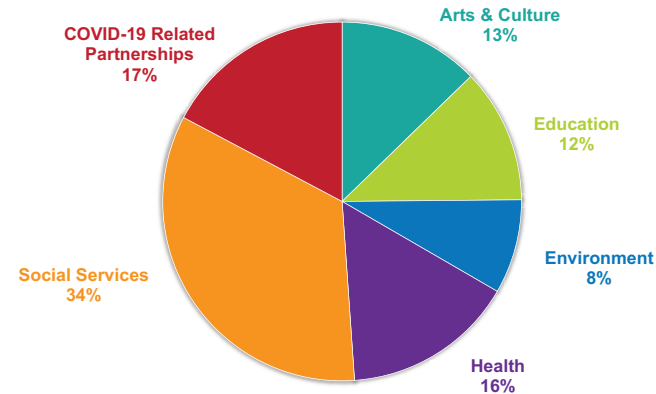
Fifty-seven grants made to various North Okanagan Charities, from Designated & Donor Advised Funds, held with CFNO.

For a full listing of 2020 grants please go to www.cfno.org.

Overall Distributions: \$1,159,400+

- \$470,900 - Designated & Donor-Advised Distributions
- \$108,500 - Smart & Caring Grants (responsive grantmaking)
- \$140,000 - Emergency Community Support Fund
- \$280,000 - Investment Readiness Program
- \$140,000 - BETTER TOGETHER - COVID-19 Community Response Fund
- \$20,000 - Sustainable Recovery Partnership

For the complete financial report visit cfno.org



The Keystone to our Ecosystems

Salmon are a keystone species; approximately 130 different species depend on the abundant nutrients of salmon as part of their food source. With the increase in ocean temperatures, ocean acidification, habitat loss, over-harvesting, and changes in the environment, salmon stocks are now threatened in our local Shuswap River.

Kingfisher Interpretive Centre Society (KICS) raises 50,000 Chinook Salmon annually, to help enhance salmon stocks. They also educate people of all ages about the importance of salmon in our ecosystem.

Each year KICS welcomes thousands of visitors to their 10-acre "living



classroom", set along the banks of the Shuswap River near Enderby, BC amidst the lush Interior Rainforest. If you've attended a salmon based school program, environmental education program, camp, workshop, family outing, or one of the many special events - you've come to appreciate the vital role salmon play in our local ecosystem and the entire Pacific Northwest.

The Community Foundation is proud to support programming with a grant to expand the outdoor patio space and make the area wheelchair accessible.

KICS lost a vital part of their salmon stewardship program when Neil Brooks, Kupis re Kekasu7 (Caretaker of the Chinook Salmon), passed away unexpectedly.

Donations can be made to the Kingfisher Interpretive Centre Endowment Fund in memory of Neil Brooks www.cfno.org.

Or support the Kingfisher Interpretive Centre today as they educate young minds to become our next salmon or watershed stewards. Visit www.kingfishercentre.org to sponsor a salmon today and become a certified salmon steward!

Granting in Action

The Good Food Box Partnership

Many of our local residents are in the precarious situation of paying a large percentage of their earnings on housing and bills. Due to the COVID-19 pandemic, many of these individuals or families are finding there is even less money left over to purchase basic food necessities. And most have never accessed local food programs or do not know how to reach out for support on their own.

Community Foundation of the North Okanagan's (CFNO), Vice-Chair, Annette Sharkey, and Executive Director, Leanne Hammond recognized the need to give people an extra boost while they are being financially

impacted by the pandemic. Sharkey and Hammond quickly responded by organizing a partnership with 7 essential service organizations and 6 schools - and positioned CFNO as the funding provider.

The program was designed to provide fresh local produce boxes and grocery gift cards to households impacted by COVID-19. The participating organizations and schools are in a unique situation to identify individuals and families that are struggling and provide them with emergency food support and connect them to local food programs. In turn, the produce boxes also support local growers.

This program will be available until April 2021. If you would like to support a family with a grocery card, please contact Leanne Hammond at leanne@cfno.org or 250-542-8655.

Good Food Box Partners:

Service organizations:

- NOYFSS (North Okanagan Youth & Family Services Society)
- Independent Living Vernon Society
- Canadian Mental Health Association - Vernon
- North Okanagan Friendship Centre
- NexusBC Community Resource Centre
- Community Futures North Okanagan
- Okanagan Boys and Girls Clubs - Vernon

Schools:

- Harwood
- Mission Hill
- Alexis Park
- Okanagan Landing
- Armstrong Elementary
- Len Wood Middle School



45 years ago, a single gift started the Community Foundation of the North Okanagan and that gift is still making a difference today.

We can help you create a fund that gives forever.



“What impresses us most about the community foundation is how they manage to do so much while keeping administration costs low. The dedication of so many volunteers working with a small, yet skilled staff ensures each donation makes the maximum impact in our community. By investing donations and distributing income rather than the principal, the Foundation is also able to distribute that funding support to the charitable sector year after year, instead of just at the time of the original gift.”

- Gail & Richard Hamilton, Donors

2020 Board of Directors & Leadership

Herb Wong
Board Chair

Mike Nolan
Vice-Chair

George Agar
Treasurer

Chris Alveberg
Secretary

Teresa Kisilevich
Director

Calvin Hoy
Director

Dave Adams
Director

Tyson Amies
Director

Brad Marsh
Director

Annette Sharkey
Director

Bruce Hopkins
Director

Leanne Hammond
Executive Director

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