



A donor's story

As a youth Jack Gordon lived in Limerick, Saskatchewan where his father was a veterinarian. "Dad was the only vet from the U.S. border to the CPR main line and he was always very busy. Even so he was also a school trustee and constantly active in the community," says Gordon.

Jack and his three brothers grew up in a town where he says, "volunteering was what you did; there was no question about it, everybody pitched in and got things done. You supported your community; there was never any doubt about that."

Vernon resident Gordon is still supporting his community as a Foundation donor. "I made a good living from this community; this is my community, I like it here, my family likes it here and I wanted to help."

He says he chose to donate to the Community Foundation, "because they do the best job of raising and managing the money." As a retired Chartered Accountant he speaks from experience.

A tax specialist, Gordon and his wife moved from Vancouver to Vernon in 1964 when he bought an accounting practice. "I had a lot of lumber clients," he says, "and Vernon was a good place to be."

Speaking about the community Gordon observes that "volunteers in Vernon do an enormous amount that people never hear about."

As a volunteer himself, he was active with North Okanagan Community



Jack Gordon

Concerts, was President of the Greater Vernon Chamber of Commerce, a director of The United Way and the Interior Region Boy Scouts and also a Community Foundation director in the 1990's chairing the Investment Committee and serving on the Grants Committee.

Gordon says he supposes his career really began in Limerick where he worked for the municipality as assistant secretary treasurer. "It sounds grand," he says, "but I swept floors, cleaned up, washed windows and occasionally even did a bit of bookkeeping."

When World War Two intervened he joined the RCAF, trained as a radar mechanic and was stationed in Great Britain from 1942 to 1945. He returned to the University of Saskatchewan, graduating in 1947, then joined an accounting firm in Regina where he achieved his Chartered Accountant designation.

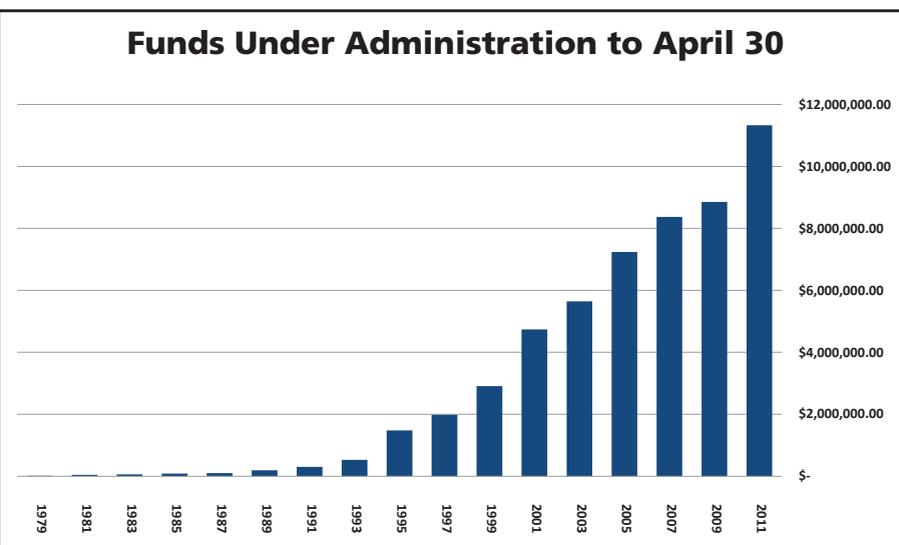
In 1952 Jack and his wife moved west to Victoria then to Vancouver two years after that. A decade later they moved to Vernon where he practiced until his retirement in 1984 as manager of the KPMG offices in Vernon and Kamloops.

"I've been lucky all my life," he says, "in school, in university, in my career. I've done well at investing and I always tried to deal with good people."

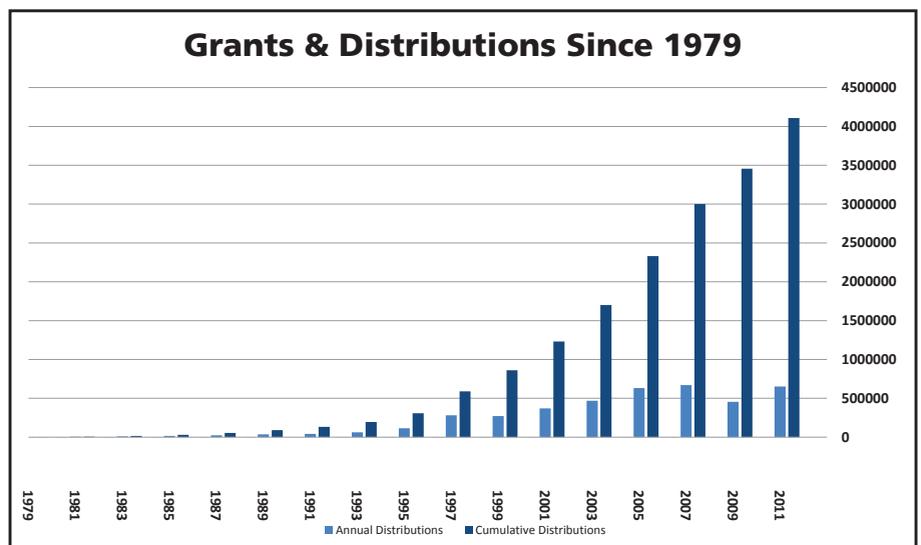
"The Foundation has a good story to tell, it's done a good job over the years," say Gordon. "Lots of people have money to give, not always big, and they need to know about the Community Foundation."

Endowment exceeds \$11,000,000

Funds Under Administration to April 30



Grants & Distributions Since 1979



A Message from the President

Community Foundations are composed of hundreds of stories; from the reason the original donors began a Foundation through the stories of all of the grant recipients, the stories of those who have generously donated since inception of the Foundation, the growth of the endowment and the directors who have served as volunteer stewards through the decades.

The Community Foundation of the North Okanagan is delighted in this Annual Report to bring to you several current stories including one about Jack Gordon, a Foundation donor who began life in Limerick, Saskatchewan before going on to lead a major accounting firm in the North Okanagan. There are also stories about current grant recipients and how discretionary funding from the Foundation is making a difference in their projects.

Part of the ongoing story of each foundation is the growth of its endowment fund and on behalf of the Board I'm able to report a significant recovery since 2008. I would like to thank the members of the Investment Committee for their initiative and guidance and to advise that funds under management have grown to \$ 11.3 million after distributions (2010 - \$10.1M).

While endowment growth has been the principal story for many foundations, the acceptance of a community leadership role has become

an important and valuable issue in many communities. I can tell you that our Foundation has begun to embrace that leadership role with the sponsorship of the Vital Signs community report card project detailed on page 4.

It's been an active year for other Foundation Committees with a new Strategic Plan to be implemented by early fall and the distribution this spring of "Giving Matters," an exciting new Foundation newsletter. The Grants Committee reviewed almost 40 grant applications this year and grants were awarded to 14 community organizations June 1st.

For many years the Grants Committee was chaired by Director, Carol Williams until her untimely passing in February. Carol was a vibrant and selfless community volunteer who earned the respect of our Board and our community. She will be missed in so many ways.

Lastly, our thanks to everyone in the community who made donations this year; your ongoing contributions and support are the backbone of a successful community foundation.



Mike Tindall,
CFNO President

Vernon Community Music School

The Vernon Community Music School was the recent recipient of a Community Foundation grant for \$15,000 toward its "Sound Foundation" campaign.

"To date, this is one of our largest grants," said Music School President, Jacquie Friesen. "The Community Foundation grant has given us a tremendous boost – psychologically and of course to the campaign total. Your contribution has given us new energy and is an example and incentive that other potential donors might follow."

The Music School is a non-profit charitable society that provides a wide range of musical instruction and educational experiences to residents of the North Okanagan. The Music School had humble beginnings, starting in 1975 with 23 students and 2 teachers housed in an Army Base Hut.

Located in the Smith House, a heritage property on 32nd Avenue, the School offers more than 32 programs taught by 23 professional music instructors to more than 650 students. Since its inception in 1975, more than 19,000 students have learned music theory, vocal technique and how to play an instrument.

"The Music School is more than a music instruction school," said Friesen. "Our goal is to help students integrate and become part of the community music scene by providing them with many opportunities to express their talents in school orchestras and ensembles and community presentations."

Scholarships are also provided and those who cannot afford music lessons are not excluded but reviewed on case by case basis.

"The Smith House is critical to providing all this instruction and activity, said Friesen. "It was built in 1908, provides an atmosphere that would be difficult to duplicate in other buildings and has the warmth and character to provide the perfect environment for a music school."

A recent engineering assessment concluded, however, that the foundation requires replacement at a total cost of approximately \$300, 000.

"The music school's budget cannot begin to support a project of this magnitude," said Friesen, "consequently, we started a fundraising effort called the Sound Foundation Capital Campaign. The purpose of the

campaign is to raise funds from grants, music school members and alumni and the community at large and we are most grateful to the Community Foundation for its support and vision."



The Smith House Heritage Property home of the Vernon Community Music School.

DonateShares.com

The Federal Budget of May 2006 eliminated capital gains on listed appreciated shares donated to a charity providing donors with excellent tax savings for donations of publicly listed shares or mutual funds. The Donate Shares Gift Program is designed for individuals, families or corporate donors wishing to support charitable causes without having to establish a private foundation. The Community Foundation thanks Dave Ellis, FCSI, CFP, a Vernon investment dealer and Foundation volunteer for creating www.donateshares.com. Please visit to learn more about this opportunity.

CFNO supports project at Kingfisher Community Hall

The rural community of Kingfisher east of Enderby is located along the banks of the Shuswap River and Kingfisher Hall, built in 1949, is the centre of community activity.

"As with most sixty-two year old buildings, the hall requires continual maintenance and upgrades. In addition, as the local population ages, the needs of the community are changing" said Society spokesperson, Murray MacDonald.

The Kingfisher Community Society (KCS) applied to the Community Foundation for a grant to improve the acoustics in the hall by reducing echoes and rebuilding the stage to accommodate events which require more intimacy such as weddings, small acoustic performances and funerals.

This project, though necessary, is hard to finance because most Society funds are committed to general maintenance.

The Foundation contribution, in partnership with the Society, will make this project a reality. A skilled group of volunteers has been assembled and is moving into the construction phase.

"We cannot overemphasize the importance of this help to our community development," said MacDonald.

The Foundation last supported the Kingfisher Community Society in 2005 with a grant to construct a porch on the hall.



Community volunteer Murray MacDonald begins work on the Kingfisher Community Hall renovation



Children's dental health will be a principal focus of the Community Dental Access Centre.

Community Dental Access Centre

The Community Dental Access Centre (CDAC) will be assisted in its clinic renovation by a grant from the Community Foundation. CDAC is a non-profit dental clinic which will provide services to all low-income people of the North Okanagan when it opens later in 2011.

"The main objective for the new Centre will be to reduce barriers to quality, restorative, and preventive oral health care for low-income individuals," said Program Coordinator, Chris Turner. "We'll be providing basic restorative services, preventative care (hygiene, sealants, fluoride varnish and early intervention), and referrals to oral surgeons."

Oral health is an extremely important part of overall health, and this program has many positive health benefits including management of

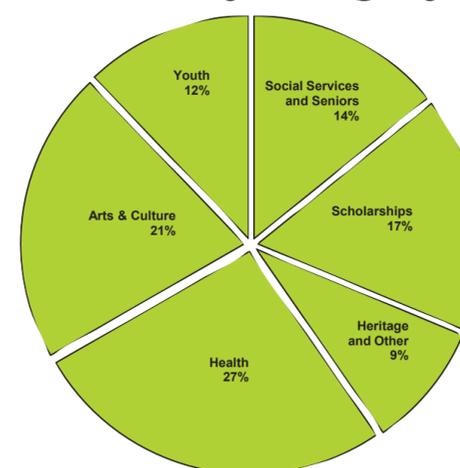
chronic disease (i.e. diabetes, cardio-pulmonary disease, kidney failure).

"The Centre will focus on prevention, particularly in young children," said Turner, "to help avoid serious outcomes such as surgeries." Rampant tooth decay is the top reason for children under the age of 14 requiring general anesthesia in BC hospitals.

CDAC staff and volunteers will work with local agencies to provide client-centered, integrated care in a respectful, caring, confidential and non-judgmental environment. "Services will be provided to the following groups," said Turner; "low-income individuals/families, children from age one, First Nations people, high-risk pregnant women, seniors, street-entrenched people, working poor, chronically unemployed, seasonal workers, drug / alcohol-addicted individuals, mental health clients, disabled individuals, persons with multiple barriers, and recent immigrants."

The Community Dental Access Centre (North Okanagan) Society is a social enterprise and a registered society with charitable status.

Grants by Category



Restricted Funds vs Discretionary Funds

Community Foundations are made up of hundreds of individual endowment funds created by past donors. When a donor has specified the recipient of the earnings from the endowment as, for instance an annual scholarship; this is known as a restricted fund. When a donor has given the money to the Foundation without disbursement instructions this is known as a discretionary fund and it is the earnings from the discretionary funds that the Grants Committee disperses each year throughout the community.

As with many older foundations the Community Foundation of the North Okanagan consists largely of restricted funds. This means that the much smaller number of discretionary funds provides a limited pool of money each year for grant applicants. This year just under \$63,000 was granted to 14 community groups while applications for funds totaled almost four times that amount. One of the Foundation's current goals is to increase the discretionary funds under management in order to support a larger number of worthy community projects.

Foundation supports after school reading clubs

Community Foundation funds will support purchase of materials for “After School Reading Clubs” managed by the Junction Literacy Centre at three Vernon Elementary Schools. The purpose of the program is to provide structured reading and writing support to children who are behind in their reading skills.

According to Debbie Schiller, Executive Director of the Junction Literacy and Youth Center, “the grant from the Community Foundation of the North Okanagan will help us purchase a kit of literacy materials (appropriate books, listening centres, letter tiles, games, etc) for each school.”

“These materials help build children’s confidence and make reading fun,” said Schiller. “In our pilot year, the program has been a great success. Children at each school love their Reading Club and their reading levels and confidence have greatly improved.”

Two days a week, selected children in grades 2

and 3 stay after school for “Reading Club”. They play outside for about 30 minutes, enjoy a healthy snack, and then engage for an hour with 2 qualified teachers and a trained volunteer in a variety of fun reading activities. Stations are set up to practice: sight word recognition, reading “just right” books one-on-one or in a small group, reading along with taped books and playing games with words and letters. These activities build children’s “sight word bank” and help develop problem-solving skills for words they don’t know.



Junction Literacy staff member works with Mission Hill School students in the After School Reading Club

Vital Signs

The Foundation is sponsoring the first Vital Signs community report card project for Vernon. The project consists of identifying Research Theme Areas such as Safety and Security, the Gap between the Rich and Poor, Housing, Learning, Arts and Culture and more. The Vernon project will likely contain 10 or 11 of these areas which are presently being identified by a citizen’s leadership advisory group.

Next, the advisory group will identify indicators within each theme which will reflect the views and experiences of different sectors in the community while providing an accurate and reliable measure of conditions and circumstances. Information and support is being provided by the RCMP, the City of Vernon, the Provincial Government and the Community Foundations of Canada. Community Futures, KPMG and the City of Vernon have contributed funds toward the project.

Once the Theme Areas and indicators have been finalized the data will be analyzed before presentation to a larger citizen’s group which will provide feedback on the findings and potential solutions. The Vital Signs Report, one of 18 under way across Canada, will be available to the public in October.

Directors



MIKE TINDALL
President



JANICE MORI
Vice-President



CATHERINE LORD
Treasurer



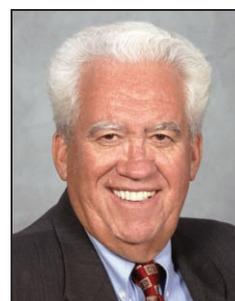
HERB WONG
Secretary



DAVE ADAMS
Director



KEITH ALLAN
Past President



MARTY ARMSTRONG
Director



TOM CHRISTENSEN
Director



DAVE HOCKLEY
Director



CALVIN HOY
Director



GARY HUSTON
Director



BRAD MARSH
Director



PAUL NIXON
Director



RUBY SHARMA
Director



PIPPA SHAW
Director



DAVE FLETCHER
Executive Director



DAVID ELLIS
Volunteer



KATHLEEN LAINSBURY
Volunteer



CORY RUNDELL
Volunteer

Sincere Thanks to Our Donors



The Community Foundation of the North Okanagan joins with the service groups, charities and organizations who have benefitted from Foundation funding in thanking the individuals and groups who so generously support the Community Foundation. Without the generous participation of our many donors, an untold number of worthwhile community projects might never reach their goals. Our sincere thanks to each and every one of you.

