



*Promises for  
Tomorrow*

# Shuswap Community Foundation



## 2004 Report to our Community

*The Foundation is always pleased to hear from the community we serve. Please feel free to contact any of the directors listed in these pages or write to Shuswap Community Foundation, Box 624, Salmon Arm, BC V1E 4N7. Email: [info@shuswapfoundation.ca](mailto:info@shuswapfoundation.ca)*

[www.shuswapfoundation.ca](http://www.shuswapfoundation.ca)



# President's Report

## OUR MISSION:

- To provide a vehicle for residents of the Shuswap to enrich their community in perpetuity through the establishment of a variety of endowed capital funds;
- To disburse the earnings on the capital funds 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.



*Cindy Derkaz*

## PRESIDENT'S REPORT 2004

I am pleased to report that Shuswap Community Foundation continues to make strong, steady, solid progress in keeping with its mission.

Financially, our permanent capital fund grew to \$1,081,685 as at our year-end of June 30, 2004. Our investment committee maintained a 5% return for distribution to the community. The income was disbursed by the Foundation to support a wide variety of charitable projects and agencies

in our community. More details about the Foundation's activities can be found in the reports and stories in this Annual Report. I hope that you enjoy reading it.

However, if you were to ask me why I am excited about the Foundation's progress, I would not say that it is the size of our endowment fund or our rate of return or even the grants we disbursed. What excites me is the way the Foundation continues to build strong connections within the community and at the same time broaden its horizons.

For example, during the past year we convened free grantwriting workshops for community groups; we developed a strategy for social justice grantmaking; our Youth Advisory Committee of Shuswap (YACOS) made a positive connection with youth in Sicamous and sponsored an all candidates meeting for youth during the federal election campaign; and we hosted a group from the Community Foundation for the Western Region of Zimbabwe.

Over the past nine years we have grown to understand the power and strength inherent in the concept of a community foundation. Community foundations provide a way for even the smallest financial donor to make a lasting difference. By pooling donations from generous individuals and corporations, a foundation can support the development of a sustainable community.

Community foundations are forever. Our horizon is perpetuity (you can not fit any better with "sustainability" than that). When we think long term, we think really long term. We want our community to be here to benefit from grants the Foundation will be making into the incalculable future. Everything that the Foundation does, from managing the permanent capital fund, to making grants, to leading discussions and convening groups of friends and neighbours, is aimed at helping to make our community an even better place to live.



*The Shuswap*

That is what excites me. And I suspect that is what excites the many donors and supporters of the Foundation.

Finally, a word about our dedicated board of directors. The Foundation is administered entirely by volunteers - a group of motivated, community-minded individuals who bring a wealth of talent and experience to the board table.

During the year Morrie Morrison, one of our founding directors, stepped down from active duty. On behalf of the Foundation, I want to thank Morrie for his contribution over the years. We miss him at the table.

We acquired two new board members this year: Bruce Nyeste and Marg Shand. Both have "hit the ground running" and are contributing greatly to the Foundation.

Nowhere is the spirit of volunteerism more apparent than in the time and energy contributed by our board and the YACOS. It is a pleasure to work with you. I thank you for all your hard work and co-operation throughout the year.

I would also like to thank our donors and corporate sponsors for their ongoing support. It is your generosity that makes it all possible.

**Cindy Derkaz, President**

## Board of Directors



**Cindy Derkaz**  
832-8652  
President



**Lois Higgins**  
832-4034  
Vice President  
Chair, Grants Committee



**Gary Brooke**  
832-9311  
Past President



**Clyde Tucker**  
832-8376  
Secretary



**Jim Scales**  
832-5594  
Treasurer



**Fred Busch**  
836-4318



**Alice Duck**  
836-3298



**Lyle Petch**  
832-7732



**Ralph Segreto**  
832-1970  
Chair, Investment Committee



**Bonnie Threlkeld**  
832-4568



**Bruce Nyeste**  
675-4127



**Marg Shand**  
832-9547



# 2004 Committee Reports

## Treasurer's Report

SHUSWAP COMMUNITY FOUNDATION STATEMENT OF FINANCIAL POSITION JUNE 30, 2004 (Unaudited - Prepared by Management*)		
	2004	2003
<b>ASSETS</b>		
<b>Current Assets</b>		
Cash and bank - restricted	\$ 40,444	\$ 43,918
Cash and bank - unrestricted	21,370	22,379
Accrued interest receivable	11,887	15,438
	<u>73,701</u>	<u>81,735</u>
<b>Long-Term Investments</b>	1,122,343	1,015,871
<b>Capital Assets</b>	-	386
	<u>\$ 1,196,044</u>	<u>\$ 1,097,992</u>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Liabilities</b>		
Accounts payable	\$ 1,300	\$ 1,300
Funds held in trust	12,079	6,082
	<u>13,379</u>	<u>7,382</u>
<b>Net Assets</b>		
Net assets restricted for endowment purposes	1,162,595	1,069,145
Unrestricted net assets	20,070	21,465
	<u>1,182,665</u>	<u>1,090,610</u>
	<u>\$ 1,196,044</u>	<u>\$ 1,097,992</u>

SHUSWAP COMMUNITY FOUNDATION STATEMENT OF OPERATIONS YEAR ENDED JUNE 30, 2004 (Unaudited - Prepared by Management*)		
	2004	2003
<b>Revenues</b>		
Administration fees	\$ 1,800	\$ 1,750
Other revenue - unrestricted	3,250	2,113
Flow through grants (LEAD and YACOS)	5,000	14,000
Investment income	42,447	46,526
	<u>52,497</u>	<u>64,389</u>
<b>Expense</b>		
Annual Report	2,644	2,380
Advertising	294	289
Computer and internet	900	1,409
Seminar costs	-	357
Memberships	150	150
Office	2,028	903
Promotion and meetings	790	2,225
Flow through grants	10,000	8,500
Professional fees	1,712	1,691
Distribution from discretionary funds	17,000	18,500
Distribution from non-discretionary funds	21,328	20,980
	<u>56,846</u>	<u>57,384</u>
<b>Excess of Revenues over Expense (Expense over Revenues)</b>	<b>\$ (4,349)</b>	<b>\$ 7,005</b>

\*Audited financial statements will be received shortly. If you would like a copy, please contact us at [info@shuswapfoundation.ca](mailto:info@shuswapfoundation.ca) or visit our website at [www.shuswapfoundation.ca](http://www.shuswapfoundation.ca) and go to our Publications page. **Jim Scales, Treasurer**

## Investment Committee Report



*Ralph Segreto*

One can get the impression, especially from dramatic t.v. series like "Traders," that investing money is all about pork belly futures and spending hours watching tiny symbols track across a monitor. The Shuswap Community Foundation's Investment Committee would like to dispel that image. We diligently follow our investment policy, which ensures we limit

our risk and obtain as high a return as we can, within that level of risk. Our risk tolerance is lower than many foundations or pension plans. We may not generate as high a long term rate of return, but we will always generate a reasonable return to fuel our donations.

Most of our investments are held in long term corporate bonds, all with Dominion Bond Rating Service bond ratings of at least A, or in insured GIC's. These investments are appropriately laddered, or spread out, over 10 years. This means that the risk of having a large amount of money coming due when interest rates are particularly low, is minimized. A smaller proportion of our pool of funds is invested in good quality preferred shares which generate above average dividends. Finally, some funds are also held by the Vancouver Foundation, as part of our start-up agreement with that excellent institution. The Vancouver Foundation investment, along with a small holding in one telephone company, make up our equity exposure. The actual breakdown is:

Bonds and GIC's - 71.20%, Preferred shares - 18.2%, Common Shares - 0.6%, Vancouver Foundation (mix of bonds and stocks) - 10%

In the past year, this conservative policy has resulted in a return of 5.89%. Each year we have delivered on our 5% goal, but the road ahead is steeper. Inflation remains low and the cost of borrowing for governments and corporations continues to drop. Where we could once obtain a good quality 10 year corporate bond paying 6%, we now struggle to find one with a yield of 5%. This has made our job more challenging, but we will not deviate from a well thought out policy and face the risk of capital losses.

Thank you to my colleagues on the Investment Committee, Jim Scales, Bonnie Threlkeld, Cindy Derkaz and, previously, Morrie Morrison, for their advice and common sense in the past year. We will continue to work at producing the best possible return for your investment in our community.

**Ralph Segreto, Chair, Investment Committee**



# Foundation Capital Fund

The 27 funds held by the Shuswap Community Foundation fall into 4 categories: Agency Funds, Dedicated Funds, Community (General) Funds and Field of Interest Funds. Earnings on Agency Funds and Dedicated Funds are disbursed annually to the agency that invested the fund with the Shuswap Foundation, or to the society specified by the donor.

Community (General) and Field of Interest

Funds are Discretionary Funds, and earnings are disbursed annually at the discretion of the Directors.

A critical element of the Shuswap Community Foundation's mandate is that it provides a vehicle through which people can benefit their community forever. Another element is that the Foundation honours and celebrates its donors, and remembers loved ones and friends. Several "named" funds

have been established with the Foundation by individuals, by families, and In Memoriam. Normally a named fund or a fund with a specific purpose must be at least \$10,000, although the Foundation will establish a named fund with \$1,000 if there is an expectation that it will continue to grow.

Please Note: Dollar figures below show contributed capital; they do not reflect any accrued interest or retained earnings.

## DEDICATED FUNDS

Agency Funds	2003	2004
District of Salmon Arm Endowment	25,780	<b>30,780</b>
Okanagan University College Foundation	100,000	<b>100,000</b>
Salmon Arm College Scholarship Trust		
▪ Vicki Hitchen Memorial	54,440	<b>55,120</b>
▪ Nancy and George Clark	77,340	<b>77,340</b>
▪ Len O'Neill Memorial	9,670	<b>10,000</b>
School District 83	53,025	<b>53,835</b>
Shuswap Art Gallery Association	54,300	<b>56,350</b>
▪ Mary (Coles) Michell		
Shuswap Hospice Society	2,000	<b>4,000</b>

### Designated (Donor Directed) Funds

Al Neale Bursary Fund	8,116	<b>17,772</b>
Kin Scholarship Fund	32,000	<b>32,000</b>
Marie Manson Memorial Art Award	19,552	<b>21,052</b>
Peterson Family Fund (Museum Assoc.)		<b>15,000</b>
Rita Smuin Memorial Bursary	10,100	<b>10,100</b>
Shuswap Area BCSPCA	16,838	<b>16,838</b>
▪ Al Neale		
▪ Peggy Kernaghan (In Memoriam)		
Shuswap Lake Health Care Foundation	3,059	<b>3,059</b>
▪ Joyce O'Neill (In Memoriam)		
Walter Ellaschuk Memorial Bursary	25,000	<b>25,000</b>

**Total Dedicated Funds \$491,220 \$528,246**

## DISCRETIONARY FUNDS

Community (General) Fund	Preferred Field of Interest	2004
Anonymous	Sicamous/Seniors	<b>45,000</b>
General Endowment Fund		<b>313,471</b>
▪ Estates of George and Nancy Clark		
▪ Estate of Catherine Shay		
▪ Founders Fund		
▪ General Fund		
▪ Dr. Tess Trueman Endowment		
John and Ingrid Monk Endowment Fund	Sicamous/Shuswap	<b>41,250</b>
Wainwright-Mobley Memorial Fund	Youth	<b>10,590</b>

### Field of Interest Fund

Administration Endowment	Foundation Administration	<b>39,851</b>
Bill MacDonald Memorial Fund	Cancer Relief	<b>5,494</b>
Enid Finn Memorial Fund	Arts (Music)	<b>4,684</b>
Gertrude and Ludwig Klein Memorial Fund	Arts/Environment/Peace	<b>11,005</b>
Jennifer Phillips Memorial Fund	Infants and Children	<b>41,283</b>
Seniors Project Fund	Seniors	<b>19,419</b>
Wayne Williamson Memorial Fund	Cancer research	<b>3,242</b>
SASCU (Credit Union) Youth Endowment	Youth (YACOS)	<b>9,000</b>
Youth Endowment Fund	Youth (YACOS)	<b>9,150</b>

### Required Field of Interest

**Total Discretionary Funds \$553,439**

**TOTAL CONTRIBUTED CAPITAL FUNDS \$1,081,685**

## A Sample of Foundation Grants



*Clients look forward to the new deck on the Helen Webb Centre at the Shuswap Association for Community Living*



*This sign informs Sunnybrae residents of coming activities*



*Shuswap Theatre in Salmon Arm has received grants over the years from the Shuswap Community Foundation*



# 2004 Grants

## Grants Made By Shuswap Community Foundation in 2004

DONEE	GRANT	PROJECT	FUND
<b>Grants from Discretionary Funds</b>			
Eagle Valley Senior Citizens Housing Society	1,000	Hot meals for seniors	Anonymous
Fletcher Park Seniors Resource Centre	3,200	Kitchen cupboards in new facility	Seniors Project Fund; John and Ingrid Monk Endowment Fund
North Shuswap First Responders Society	750	Emergency equipment storage	General Fund
Salmon Arm Museum and Heritage Association	1,000	Climate control in archives	Donations in Memory of Lloyd Askew
Salmon Arm Pottery Club**	825	Vent in kiln room	Gertrude and Ludwig Klein Memorial Fund and General in Memory of Sieg and Louise Silver
Shuswap Art Gallery Association	800	Kids' art workshops	Wainwright-Mobley Memorial Fund
Shuswap Association of Writers**	1,400	3 public performances by writers and musicians at 2005 Writers' Festival	General Fund in Memory of Gordon Priestman
Shuswap District Arts Council	2,000	Energy efficient windows/doors	General Fund in Memory of Eve Wright—an Arts Council Founder
Shuswap Family Resource Centre	2,000	Community baby food kitchens	Jennifer Phillips Memorial Fund
Shuswap Music Festival Society	2,500	Support 2005 Festival	General Fund in Memory of Nancy and George Clark
Shuswap Search and Rescue Society	3,000	Tracker training for 12 members	General Fund
Shuswap Violin Society***	1,000	Violin workshop	General Fund
Sicamous and District Performing Arts Society**	500	Shakespeare in the Park in 2005	Enid Finn Memorial Fund
Sicamous and District Seniors Centre Society	1,500	Hall air conditioning project	John and Ingrid Monk Endowment Fund; Anonymous
Sunnybrae Community Association*	600	Lighting and landscaping at hall	General Fund
<b>YOUTH ADVISORY COMMITTEE (YACOS) GRANTS</b>			
Shuswap Rugby Development Club***	1,500	Coaching training	SASCU Youth Endowment and SASCU grant funding
Storefront School**	1,000	Student built "park" project	Youth Endowment Fund
<b>LEAD GRANTS (In cooperation with the Vancouver Foundation)</b>			
Salmon Arm Bay Nature Enhancement Society	2,500	Renovations to Interpretive Centre at wharf	* Project(s) sponsored by Shuswap Estates Community Association ** Project(s) sponsored by the Shuswap District Arts Council *** Project(s) sponsored by School District No. 83
Shuswap Ass'n for Community Living	2,500	Self advocacy counselling	
<b>Total from Discretionary Funds</b>	<b>\$29,575</b>		
<b>Disbursements from Dedicated Funds</b>			
District of Salmon Arm	1,453	Capitalize and retain in Fund	DSA Endowment Fund
Marie Manson Trust (Arts Council)	1,200	Art scholarships	Marie Manson Memorial Art Award
OUC Foundation	5,144	Scholarships	OUC Endowment Fund
Salmon Arm College Scholarship Fund	7,723	Scholarships/Bursaries	Vicki Hitchen Memorial, George and Nancy Clark Memorial, Len O'Neill Memorial, and Al Neale Bursary Fund
Salmon Arm Museum and Heritage	504		Peterson Family Endowment
Shuswap Art Gallery Association	2,778		SAGA Endowment Fund
Shuswap BCSPCA	855		Shuswap Area BCSPCA Endowment
Shuswap Hospice Society	150		Shuswap Hospice Society Endowment
Shuswap Lake Health Care Fdn.	167		SLHC Foundation Endowment
School District No. 83	6,000	Scholarships/Bursaries	Kin Scholarship Fund, Rita Smuin Mem. Bursary, Walter Ellaschuk Mem. Bursary, SD 83 Endowment and donations from the Air Traffic Controllers Reunion.
<b>Total from Dedicated Funds</b>	<b>\$25,974</b>		
<b>TOTAL GRANTS FOR 2004</b>	<b>\$55,549</b>		



# Peterson Family Fund

## Donation Helps Local Museum



*The Peterson brothers taken in the late 1960's. From left: Hjalmar, Hubert, Floyd, Alf and Elmer.*



*Picking apples in 1947 in the Peterson orchard. From left: Gordon Wagner, Floyd Peterson, Harry Groat, Annie Lund (Nee Kavolinas), Mrs. Harry Groat, Cecil Samers, Alf Peterson and Violet Peterson.*

The Salmon Arm Museum and Heritage Association, that oversees the operation of R.J. Haney Heritage Park, received a gift from the Peterson family – one of the area's early families who settled here in 1911.

This generous gift of \$15,000 has been placed in a separate fund with the Shuswap Community Foundation and the income from that fund will be paid to the Museum to

*"...this type of gift is precisely what was contemplated when the Shuswap Community Foundation was set up..." Gary Brooke*

support its activities.

The Peterson family: Hubert, Elmer, Hjalmar, Floyd, Margaret, Violet, Alf and Ingrid were all born here and the three eldest brothers took an especially keen interest in the local Museum.

Floyd and Barbara Peterson of Salmon Arm, who initiated the transaction, said the money comes from Hubert Peterson's estate and they felt, because of Hubert's interests, a donation to the Museum seemed appropriate.

Doug Adams, president of the Salmon Arm Museum & Heritage Association, says they were "delighted with this donation and the income from that will leave a legacy to maintain the museum's collection of papers and documents from the family as well as general operations." Adams added that he hopes this is just the first of other donations which could be added to this significant donation in the future. Adams pointed out that the Peterson family, earlier, made a donation to build decks on the main museum building and also gave them items from the fruit industry for a permanent display.

Foundation past president, Gary Brooke, was also delighted with the gift. "Here's a local

family that has made a permanent gift to the community. It not only honours the family but gives direct and permanent support to the museum."

Brooke says this type of gift is precisely what was contemplated when the Shuswap Community Foundation was set up in the early 1990's. He hopes other people will take an opportunity to contribute to the Peterson Family Fund to support the Museum.

### BEGINNINGS

As his surname reflects, Floyd's parents came from Sweden and, in fact the family spoke Swedish at home. His father claimed it was better for them to learn English at school rather than from him because his English would carry Swedish inflections.

His father, Ed, and two uncles arrived in the area in 1911 to work in a mill in Chase. When they got there and found there was no work they returned to Salmon Arm where they were befriended by Jim Evans. Evans let them stay in his cabin for the winter and had them cut wood for him. At that time, Floyd's father, uncles and another man agreed with landowner Sam Greenwood to clear/log 40 acres of land in North Broadview. They did this with a team of horses, stumping powder and a grub-hoe, and each of them received 10 acres and \$50 for their labours.

In 1912 Floyd's mother arrived in Revelstoke from Sweden moving to Salmon Arm from Revelstoke in 1914.

By 1914 the area became the Broadview Water District drawing water from East Canoe Creek. Floyd says his father and, uncle Ivor, had the contract to dig a pipeline, by hand, from what is the present-day Trans-Canada Highway to 60th Avenue, a distance of some two-and-a-half miles. The trench was about three-and-a-half feet deep and they were paid 7 cents a running foot! The water was for domestic use and never used as an irrigation

system. "In fact," he adds, "the Peterson orchards were never irrigated."

### APPLES

Floyd's father did not operate his first orchard until 1928 and didn't get into the orchard business permanently until 1930.

The Peterson orchard never had a box label, Floyd explains, because they simply shipped apples through the Salmon Arm Farmers' Exchange (SAFE). Today, he says, the apples are shipped through the Okanagan North Growers Co-op in Winfield.

In the early days of apple growing the most popular varieties were: Wealthy, MacIntosh, Red Delicious, Rome Beauties, Northern Spy and later Golden Delicious. Today, he notes, they grow over 50 varieties.

### LAND

Locating the various Peterson orchards is a bit like reading a map of Salmon Arm. In addition to the orchard at the north end of North Broadview and the home orchard on 35 St. NE, they leased 10 acres on the north side of 20th Ave from 1930 to 1950, and also 14 acres west of 20th Ave. from 1930 to 1965.

His father at one time owned a 12-acre orchard which today is called Appleyard subdivision. In a tax sale, his father also bought land on North Broadview once owned by a Mr. Wilcox. This 80 acre parcel is still in the family and a half-acre of this land is Floyd and Barbara's present day home.

### FAMILY BUSINESS

The five Peterson brothers and their father formed a company called "Peterson Brothers Salmon Arm Ltd." to run the orchards. The two older brothers, Hubert and Elmer, had also formed a separate partnership to operate bulldozers for building logging roads and snow

*Continued on page 7*

ploughing roads for the District of Salmon Arm. Floyd says they had to plough sometimes on a 24-hour basis to clear snow from roads at Canoe to Kault Hill, the Industrial Park to Silver Creek.

### SCHOOL

The old North Broadview school, once located on the corner of 30th St. SW and 45 Ave., was built in 1917. All Peterson children attended this school and he smiles recalling when three generations- himself, his daughter Norma and grandson, Craig,- had their photograph taken in front of the school they had all attended.

It was a surprise when one day, in the late 1980's, Barbara looked out of their kitchen window to see signs across the road that the School District was going to demolish this landmark. "The School District was going to destroy the school," Barbara stated.

Floyd's daughter Norma Harisch, who was also president of the Museum Society at the time, got on the phone to the School District to cancel the demolition and garnered funds to move the building to R.J. Haney Heritage Park. Floyd adds that the School District even put in \$5,000 for the move.

Floyd says his brother Elmer also insisted a flag pole be placed near the re-located school house because he remembered in this youth that the "Union Jack went up every

morning and down every night. Elmer made the monetary arrangements to see that this was done," Floyd remembers.

The old school is a focal point in Haney Park. The lower floor has been converted into a tea house while the upper floor is set up to reflect those early school days with desks, blackboards, old school books and sometimes even a "school marm."

### DONATIONS

Barbara Peterson says, "It would be nice if people donated to the Peterson Family Fund through the Shuswap Community Foundation." She says both Hubert and Hjalmar put money into the Foundation a few years ago and she feels Hubert would have been pleased this Fund was created.

You may write for information or make donations to the Peterson Family Fund or other specific charities, fields of interest or the general welfare of our community to: The Shuswap Community Foundation, Box 624, Salmon Arm, BC, V1E 4N7. Check out the website at [www.shuswapfoundation.ca](http://www.shuswapfoundation.ca) or email [info@shuswapfoundation.ca](mailto:info@shuswapfoundation.ca)

*(Marg Shand)*

*(Photos courtesy Salmon Arm Museum & Heritage Association)*



Painting by pioneer artist Herman Gesell forms part of a new exhibit at the R.J. Haney Heritage Park operated by the Salmon Arm Museum and Heritage Association. Shuswap Community Foundation grants support the preservation of our community's heritage.



### Philanthropy

Community foundations foster philanthropy whereby individuals or families give or leave money to the foundation which can be conservatively invested. The resulting interest from that investment is given out in the form of grants to community projects that will enrich the lives of Shuswap residents in perpetuity.

The principal is never touched. Foundations succeed by the power of "pooling" resources along with strong financial management. This strategy makes it possible to achieve maximum growth consistent with preservation of capital.

### Foundation Makes Community Grow

The Shuswap Community Foundation, one of more than 100 community foundations in Canada, has been in operation less than a decade yet its assets have grown to over one million dollars! This growth, coupled with the Foundation's leadership in the community, has made it one of the most successful foundations in Canada.

The beneficiaries of this Foundation's reputation are the people and communities of the Shuswap.

## LEAD Grants

LEAD stands for Leadership, Engagement, And Development. This is a grant program established by the Vancouver Foundation as a Millennium Project in 2000. The idea is to provide each of the 30 community foundations in B.C. with money they can re-grant to assist to build capacity in our communities.

In 2000 and 2002, by matching Vancouver Foundation's dollars, and by getting local governments on board, the Shuswap Foundation funded 54 neighbourhood projects in the Shuswap. In 2003 the Shuswap Foundation gave three LEAD grants of \$2,500 each to the Eagle Valley Community Support Society, Habitat for Humanity (Salmon Arm), and the Little Shuswap First Nation.

This year (2004) the Foundation provided two LEAD grants of \$2,500 each. One to SABNES to assist in making the interpretive centre at the Wharf more accessible, and one to the Shuswap Association for Community Living to provide training in self advocacy for clients.



*The Western Grebe is one of many waterfowl that can be spotted in the bay. Salmon Arm Bay Nature Enhancement Society, a recipient of LEAD funding from the Foundation, fosters appreciation of nature.*



# Memorials

## Gertrude and Ludwig Klein – Lives Lived



*Gertrude, April 1, 1918 to June 2, 2000*

*Ludwig, July 10, 1908 to April 1, 2002*

In 1974 Gertrude and Ludwig Klein chose Salmon Arm as their retirement home and for over a quarter century they enjoyed living here. They loved their flower and vegetable gardens, their friends and their community. This idyllic home did not stop them from making trips to other parts of the world, but they were always happy to return to “heaven on earth”, as Ludwig liked to call Salmon Arm

Ludwig was born in Gross-Zimmern (near Frankfurt) in Germany. He grew up on a small farm where he developed his love and understanding of nature. As well, he was passionately involved in sport, gymnastics and later, coaching young athletes. He lived through two world wars and developed a strong pacifist attitude and an environmentally friendly consciousness.

In 1952, he decided to leave Germany and immigrated to a new life in Canada. He went to a job in St. John’s, Newfoundland, and saved his wages to allow his family to join him. When his young family arrived in 1953 they settled in Montreal and started life with the three trunks that contained all of their possessions. Here Ludwig continued to practise his trade as a master toolmaker.

The first years of immigrant life were difficult—learning the language and adapting to strange customs and a new land. Those years were filled with hard work and a conserving lifestyle, practices that remained with them all their lives. At the time there was no ‘social safety net’ and the entire family worked together to build their lives in Canada.

Gertrude was born in Schifferstadt and was raised in Ludwigshafen, Germany. She had a wonderful youth creating works of art with wool, yarn, and fabric, travelling by bicycle and car and going to concerts, operas and balls—she loved to dance. Gertrude also loved to drive her car and had a 64-year impeccable driving record. In Montreal she embarked on a busy career supervising a chain of bakery stores located all over the island.

Through her tolerant nature and love of the arts, especially music, Gertrude gave her

family life-long gifts. Ludwig was a man ahead of his time, an inventor who loved to solve problems—he wanted to improve his family’s and other’s lives. Both Gertrude and Ludwig showed this all-consuming love for peace and nature by treating everyone with respect and treading gently upon the earth.

The example of their dignified lives filled with a sense of duty, self-reliance, honest and hard work, integrity, compassion, love and respect for others as well as the earth and its gifts, is their legacy.

In honour of Gertrude and Ludwig’s gentle, creative and caring lives, a memorial fund will support peace, environment and arts projects in perpetuity.

### A DAUGHTER’S COMMENTS

*Through the Foundation, I can realize father’s dreams and goals to make the world a better place. I feel the engines are the community volunteers and the fuel is the Foundation.*

*Ludwig came to the community meeting with me, in the Fall of 2000, at the Community Centre. He was 92. He took everything in and decided “that was a good organization.”*

*I realized then that, when the time came, this is where memorial tributes (in lieu of flowers) should go. That is how it started.*

*Ludwig always said, “I am not going to die.” He, of course, meant in the spiritual sense. What better way to ensure that Ludwig does not die. This better than a tombstone. This is active. It will grow, generate enthusiasm and activity and good will in perpetuity.*

*(Gabriele Klein)*

## In Memoriam

*The Shuswap Foundation has received gifts in memory of the following people. The Foundation is committed to remembering these individuals, and whenever appropriate, celebrating their memory by making grants in their names.*

Lloyd Askew  
Marcel Asquin (Shuswap Art Gallery Ass’n)  
Carol Berger  
William Bews  
Joan and Gordon Brooke  
Marion and Jack Brooke  
Morris (“Butch”) Clifford  
Dr. Barry Deakin  
Betty-Jean Derkaz (Seniors Project Fund)  
Margaret Doe  
Sinclair Dunnett  
Art Fraser  
Guy Graham  
Bob Griffiths  
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## Winners Announced for the 2004 Marie Manson Memorial Arts Award

The 2004 recipients of the Marie Manson Memorial Arts Award were recently named. They are: Stephen Strutynski, a third year student in the honours program, Faculty of Visual Arts, University of Victoria (\$600); Sarah Wiens, who graduated from UBC with a BA in Studio Art (\$300), and Valerie Rogers, a local watercolour artist who is also a writer and children's entertainer (\$300).

The Award was set up in 1981 by friends and family to honour the memory of Marie Manson, a talented and versatile artist and craftsperson. It is open to serious artists in all fields who have a connection with the Shuswap. The fund is administered by Shuswap Community Foundation and disbursed by a group of five trustees. Over the years the Award has assisted close to 40 artists.

Stephen Strutynski attended both Salmon Arm Senior Secondary and Okanagan University College. The 4th year honours program is an intense eight-month studio course; only 15 students are chosen to participate. His work focuses on painting, drawing, photography and sculpture. He is interested in installations, using all of these mediums in the same piece. The Award will help to pay for art material. Stephen plans to teach art

at the secondary level in his own community and eventually earn a master's degree in visual arts.

Sarah Wiens, who graduated from UBC with a BA in Studio Arts, is also a certified secondary school teacher. Although she studied printmaking, sculpture and textile arts, she particularly enjoys the two-dimensional aspects of painting and photography, often combining them directly in one image. Her eventual goal is to create a viable career as an artist. Sarah plans to use the Award to take an art course that will enable her to develop her painting technique further.

Valerie Rogers is a local watercolour artist who paints in-depth visual studies of nature and its creatures. Recently, she was one of three finalists in the BC Wildlife Federation's "Artist of the Year" award. Valerie describes her work as "an effort to make a small tear in time to hold nature still for you to see." She plans to put the Award toward attending a workshop led by an expert in the field of wildlife painting. Valerie, who was co-ordinator for the Banner Project this spring, also won an Arts Council Community Art Award.

(Robin Suddaby)



Marie Manson

## YACOS - Year in Review

In December, Salmon Arm Savings and Credit Union provided the second installment of their three-year commitment to the Foundation's Youth in Philanthropy initiative. The Credit Union's contribution of \$4,000 was matched by the Vancouver Foundation in February.

The Credit Union knew it would take time for the youth endowment funds to earn substantial interest, so they added an additional \$1,500 to be given away this year.

In May, YACOS\* paid a visit to Sicamous: "We're looking for representatives with ideas," says YACOS member Drew Hilland to youth attending a meeting at the Red Barn. Some 30 young people, and a dozen adults, were present to hear how they could generate ideas and apply for grants for projects that would benefit youth in the Sicamous/Eagle Valley community.

In June, YACOS also came in for high praise when they organized an All Candidates Forum at Salmon Arm Senior Secondary School, prior to the spring Federal Election, aimed at those students who would be voting for the first time. At the time, it was the only All Candidates forum

in town. On hand were Conservative MP Darrel Stinson, Liberal party rep Will Hansma, the NDP's Alice Brown and the Green Party's Eric Nelson.

In July, the YACOS made their grants for 2004. The Salmon Arm Storefront School Park, located in the Education Centre beside the former JL Jackson site, will see more improvements thanks to a \$1,000 grant from YACOS. Committee members were impressed with the work of Storefront youth to date, and see the park as a major contribution by youth to future school attendees.

YACOS second grant was \$1,500 to the Shuswap Development Rugby Club to support the growth of rugby in the Shuswap by building a pool of competent coaches and referees.

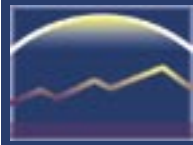
\*YACOS (Youth Advisory Committee of Shuswap) is a committee of Shuswap Community Foundation. It is comprised of youth who meet regularly to plan and implement grant-making activities for youth projects, and, with the help of the Salmon Arm Savings & Credit Union and the Vancouver Foundation, to develop youth endowment funds.



Greg Schell (left), marketing manager with Salmon Arm Savings & Credit Union, joins Barbara Dates (right) representing the Vancouver Foundation to present cheques to YACOS members (l-r) Drew Hilland, Kim Shuert, Cheryl Long and Paige Hilland.



Storefront School staff accept a cheque for \$1,000 from YACOS for upgrades to Education Centre Park. From left: Cheryl Long, Rita Beraro, Kim Shuert, Paige Hilland, A.J. Decker and Brian Maurer.



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## Queest Mountain Lookout Tower at R.J. Haney Heritage Park

No one can argue that local Ministry of Forests staff members were not personally affected when the Salmon Arm Forest District Office closed its doors last spring. It was hard for the team to accept the loss, but they decided to avoid concentrating on the negative.

Many employees expressed an interest in giving something back to the community where they had made their homes. Their desire was to create a positive legacy for future generations. Telling the story of forestry protection in an educational setting became their goal. The plan was simple. Relocate and refurbish the lookout station from Queest Mountain, overlooking Anstey Arm, a forestry tower that was also slated for elimination.

Staff members at the Ministry of Forests disassembled the two-storey prefabricated structure and transported it to Salmon Arm in 2002 before they moved on to new jobs in new communities. The Salmon Arm Museum provided a location at Haney Heritage Park, an engineer created drawings, and permits were issued.

After a winter of refurbishing components, a new, timber-frame base was constructed Spring 2003. There were a few staff that managed to keep their houses in Salmon Arm and could still work on the project. The lookout was placed on the highest point of land at the Park. The jigsaw pieces of the tower were reassembled and sit tall on new supports, with a magnificent view of Bastion Mountain, Fly Hills and surrounding agricultural lands.

This spring there are plans to install a hand railing. The next task is to finish the interior walls and ceiling. Finally, the artifacts, a collection of forestry memorabilia that has been gathered from throughout the province, will be installed.

Ted McTaggart, Construction Manager at Haney Heritage Park, says "it has been a pleasure to work with this enthusiastic, energetic group. Incidentally the project has become extra special," McTaggart notes, "because of the 2003 fire season. The public is more aware of the protection role our forest service plays."

Salmon Arm Museum Board Members also see the project in a positive light. "It is a partnership that benefits both the Salmon Arm Museum and the visitors to Haney Heritage Park," says Norma Harisch, Past President of the Association. "It is a legacy. A gift lovingly given."



*Shuswap Community Foundation assisted with funding to relocate and refurbish a forestry lookout station from Queest Mountain to R.J. Haney Heritage Park.*

*Deborah Chapman - Curator/Archivist  
Salmon Arm Museum and Heritage Ass'n  
at R.J. Haney Heritage Park*



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## Naturalist Club Celebrates the Birds of Salmon Arm

The Shuswap Naturalist Club has just completed a two-year educational project to create a series of colour posters featuring Frank Kime's watercolour paintings of birds of the Salmon Arm Bay. This project is part of a province-wide educational program for children endorsed by the Federation of BC Naturalists.

According to Frank, Salmon Arm is one of only two towns in British Columbia that is fortunate enough to have a wetland bird sanctuary right in the downtown area. Since he moved to the area in 1983, Frank has devoted much time to trying to preserve this area as a healthy ecology for wildlife and for the enjoyment of our Salmon Arm residents and visitors, young and old.

The idea of using his paintings to introduce school children to local birds and their environment was sparked by his young grandson's requests for paintings of exotic birds such as the Hoopoe and Toucan. These pictures now hang in his grandson's bedroom, providing a background presence in his daily life of computer games and toy-cars.

Frank's paintings have been reproduced as posters featuring the marsh birds, raptors, loons and grebes, diving ducks, and surface-

feeding ducks. Because they are directed at children, these paintings show the birds standing out more predominately than in the usual paintings and posters of marsh areas. All of these birds can be seen frequently during the seasons and many nest and raise their families here.

Sets of posters will be distributed to the area schools, and club members are willing to work with teachers. The posters are available to the general public at a modest price. Enquiries and requests for posters can be made to Anna Stewart at 832-1981.

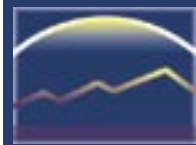
The club is grateful for the financial support of the Federation of BC Naturalists, and other environmentally conscious groups such as TD Friends of the Environment, Shuswap Community Foundation, the Shuswap District Arts Council and the Rotary Club of Salmon Arm.

Naturalist Club members meet on the first Tuesday of the month at 7:00 p.m. at the SASS library. Frequent field outings are made from April to October, plus the Christmas bird count. The club is excited to have been chosen to host the conference of the Federation of BC Naturalists in Salmon Arm in May 2005.

(Marlene McDonald)



*Shuswap Community Foundation assisted with funding for this poster project depicting birds of the Salmon Arm Bay.*



# Corporate Sponsors

Shuswap Community Foundation works hard at fundraising, knowing that the money raised will meet the changing needs of the community through the years. Support from our generous corporate sponsors was vital in the publication of the Report to Our Community. With deep appreciation, we recognize these Friends of the Foundation.



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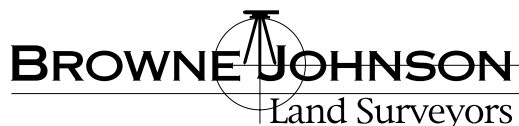
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If you check out the "links" page, you will see that you can connect directly to almost every top rated source of information for volunteers and non-profit societies in the country—including valuable advice and information about directors' and officers' insurance. You can also get directly to Canada Revenue Agency's Charities Division where you will find anything you need to know about charity tax law, registering a charity, who is who in the neighbourhood (including the ability to proof your own organization's data).

We are just in the process of adding a fabulous new information link for the benefit of professional advisors and anyone else interested in charitable giving. This unique aid was developed by the Trillium Foundation of Ontario, tested by the Community Foundations of Canada, and finally, customized to our own use right here in the Shuswap.

In the publications section you can find our annual reports and our audited financial statements. Go to the "about us" pages if you want to meet the directors (or phone one of us). So check us out. Questions or comments are welcome; send us an e-mail to: [info@shuswapfoundation.ca](mailto:info@shuswapfoundation.ca)



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