

COMMUNITY FOUNDATION OF MEDICINE HAT & SOUTHEASTERN ALBERTA

# ANNUAL REPORT 2010-2011

your  
gift  
**shines**



**COMMUNITY  
FOUNDATION**

*of Medicine Hat and Southeastern Alberta*

CREATING A BETTER COMMUNITY: TODAY, TOMORROW...**FOREVER**



# *Welcome to our Annual Report 2010-2011*

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## *History...*

The idea of organizing a charitable foundation for Southeastern Alberta began with rancher John O. Ignatius. The Medicine Hat Community Foundation was then founded in 1992 through an act of Legislature of the Province of Alberta. It is a non-government, non-political and non-religious independent organization that operates under the guidance of a diverse group of community-minded volunteer Board of Directors. In 2005 the Act was amended and the title changed to Community Foundation of Medicine Hat & Southeastern Alberta.

## *Vision...*

Creating a better community: Today, Tomorrow, Forever.

## *Mission...*

Improving the quality of life for the people of Southeastern Alberta through developing permanent endowments, making responsible grants, and inspiring community leadership.

## *Professional Management...*

**Investment Manager:** Jarislowsky Fraser Ltd.

**Banker:** TD Canada Trust

**Custodian:** RBC Dexia

**Auditor:** Ensminger, Beck & Thompson

**Legal Counsel:** David J. Carter

# Welcoming Message...

It is very uplifting to hear the stories from organizations that have received funding and to learn about the impact these grants have made. It is clear that these organizations are able to advance their missions and make a difference for many local people.

The Foundation's donors have been outstanding in their generosity helping us to distribute nearly \$250,000 of grants in the past 12 months, which is a 13% increase over the prior year. This was particularly evident in the support provided to the Immediate Assistance Fund for Flood Relief. Nearly \$88,000 was raised and every cent went directly to those affected. Many thanks to the Municipalities who we worked with to establish the utilities rebate program which in most cases meant that those hit hardest by the flooding didn't have to pay a utility bill last winter.

The effects of the highs and lows on the global economy and the investment markets have had a tremendous impact on all types of organizations including community foundations. In the past year we have seen somewhat of a recovery as far as our investment portfolio is concerned although continuing market volatility is clearly here to stay for a while yet.

Recognizing the important leadership role that we play in the community, we are using this time to update: our strategies, the structure of our committees and the role of both Board and Staff. The Foundation can act as a catalyst for collaboration, partnerships and networking. We recognize the importance of programs such as Vital Signs® in demonstrating our in depth community knowledge and possible opportunities for community action.

This year we said farewell to retiring board members Sharran Kungel, Janice Blair, and Brian Rothwell. Thank you for everything you have done for the Community Foundation. To new board members Elaine Beierbach, Dennis Egert, and Jason Melhoff a warm welcome. To the organizations that turn grants into vital programs and generous donors who make it all possible, thank you. The Community Foundation is situated to continue to make a positive impact and to work towards our vision of *Creating a better community: Today, Tomorrow, Forever.*

**Cory Baksa, Board Chair**

**Mike Christie, Executive Director**

## The Power of Endowment...

Charles Harvey's parents taught him about the importance of giving back and, in 1991, Charles continued that tradition. He established the Charles F. J. Harvey Family Fund at his local community foundation.

His initial gift was \$15,000. But over the years Charles' fund grew, through new contributions and prudent stewardship of the capital, to \$278,000. Every year his fund provides \$14,000 in grants to youth-at-risk, or isolated seniors or programs that allow the physically challenged to work, live and play to their full potential.

Today, Charles' initial gift has been given away more than 18 times already.

His gift of \$15,000 could have been spent in 1991, with a single impact in the community. But compare that to the benefit the community continues to realize through the endowment of his gift. In another 15 or 30 or 45 years this story will still be relevant — it is not just a moment in history for Charles Harvey and his community... it is a growing legacy.



## COMMUNITY FUNDS

### \$1,000 Plus

Caragata Quintin Family  
Henry Haugan Family  
Jamie & Janet White  
Ken & Sharon Zollner  
Source for Sports -  
Brian and Milvia Bauman Fund  
Classic Construction Ltd  
Dr. Scott Van Dam  
Financial Solutions-Vern Hyde  
Vance & Ruth Andreas & Family  
Smitty's Family Restaurant  
Stephanie Churla & Family  
Sandy Kapeller Family(RE/MAX)  
Anonymous - Arthur  
Fred & Heather Hall Family  
Adolf, Joan & Andrea Seiler  
Bevan Family  
Brad & Marlene Lay  
Bryan & April LaBatte Family  
Cecile & Dave Jones  
Cindy Guttormsen  
City Plymouth Chrysler  
Co-op Rainbow Women's Guild  
Corporate Business Equipment  
Curtis Ensminger & Jan Tate  
Donald & Mary Ann Owens  
Dr Ken & Deanna Siemans Family  
Dr. J.P. Gallimore  
Dwayne & Pat Dietrich Family  
Edward & Marni Jakubowsky  
Emma Good  
George & Edna Finch & Family  
Grant & Colette Bright Family  
Howard & Ella Stotz Family  
J&R Zachary & G&S Guerra  
J.R. Aitken & Family  
James & Kathleen Foy  
James C. & Norah Miller  
James C. Fisher  
Jeraj Family  
Jim & Anne Liboiron Family  
Kawan Family  
Kay & Roy Olsen  
Ken & Valerie Sauer Family  
Kevin Fischer Family

## Donor Directions:

# Customized Philanthropy

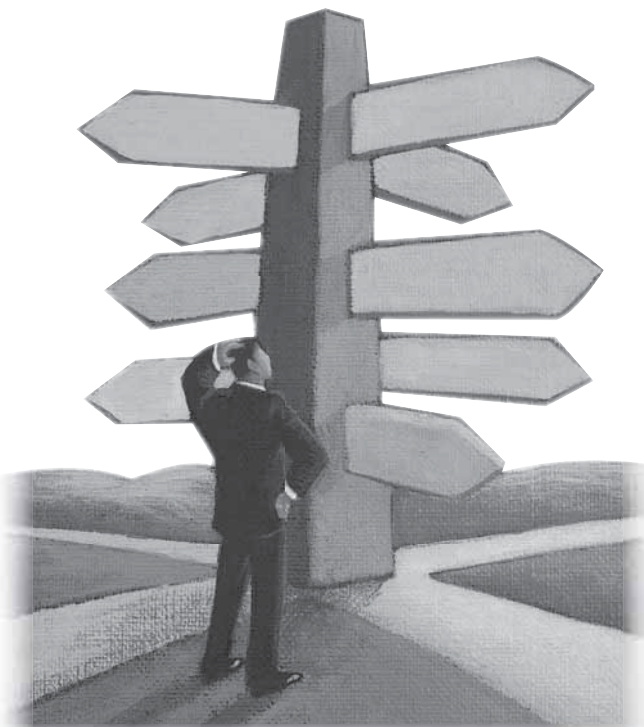
by Marlene Watson

The word "*customize*" brings to mind specific, tailored, personal and expensive! In most instances that is indeed true. We at the Community Foundation are specialists in Customized Philanthropy. Customized Philanthropy is specific, tailored, personal and affordable. The Community Foundation offers resources to help donors create a customized plan that will cater to their priorities and preferences. Often donors have questions about who will have access to their giving information and where their names will be published. All our donors are individual and important to the Community Foundation and we carefully consider their wishes before including their names in any material that leaves the foundation's office. All donors are generous and greatly benefit the Community Foundation and if they are feeling perhaps a bit shy or simply would prefer not to be named, they aren't named. Other donors are more gregarious and outgoing and love having their name af-

filiated with the Community Foundation at every opportunity. This is another way we are in a position to further our customization.

The giving plans we set up are as different and varied as the donors we work with. In simplistic terms, the Community Foundation accepts donations and invests the money in an endowed or forever fund. The interest from this investment is distributed through a granting process to eligible charities. That is where simplicity ends and customization begins. Some of the options we offer include: accepting cash, publically traded shares or life insurance policies. The donor also has as much or as little input regarding which charities benefit from their philanthropy. With no obligation or service fees, customization is finally affordable!

For more information on Customized Philanthropy, or how to donate, call 403.527.9038 or go to [www.mhcf.ca](http://www.mhcf.ca).



# Create Your Legacy Today!

For over 18 years the Community Foundation of Medicine Hat and Southeastern Alberta has been helping people create a lasting legacy for their community. The Foundation now holds over 260 endowed funds that support a large array of charitable causes.

Donors know that we provide a **simple solution**. Using our services, an endowment fund is quick and easy to open and at no cost. Our expert administration makes your fund both time and cost efficient.

Donors know that we provide **flexibility**. There are a number of ways to create and name a fund that meets your needs. You can designate a specific charity or identify an issue area for support, such as the environment or youth; the choice is yours. Many donors choose to support the community through the discretionary fund which allows the Foundation to respond to evolving needs. We offer other types of funds to meet the needs of all donors.

Donors know we are **effective**. There are a number of ways to make a gift to the Foundation either to existing funds or the creation of named funds. Gifts can be cash, publicly traded securities, bequests, life insurance policies or other assets.

Donors know we offer **impact**. Our annual research report, Vital Signs® is a good platform base to identify the issues and for informing pri-

orities for action. It can be used to assist you in creating the most impact from your fund. Many charities struggle to deal with increasing financial pressures, and perpetual steady flow of revenue from an endowed fund is of utmost importance.

## Impressed! Gift now or later?

By creating a fund now you can see your dollars at work. For families it provides an opportunity to discuss giving with their children around causes that have touched their lives.

By becoming a Heritage Member of the Legacy Club you can join others who have allocated a future gift. Your fund is established through your estate at the time your will is realized. Your fund continues your charitable goals based on guidelines you have provided.

For more information on how to create your own legacy call 403-527-9038 or go to [www.mhcf.ca](http://www.mhcf.ca).

## Heritage Members

*Our warmest appreciation goes out to the following Heritage Members:*

Kathy Hern	Ann Bernhardt
Ben Hern	Otto Bernhardt
Mike Christie	Bill Bauman
Ann Warhaft	Doug Heine
Adele Armstrong	Shirley Heine
Gilda Valli	Robin Houlston
Dr. Al Garden	George Greenfield
Donna MacLean	Gary Stimson
Keri Bradford	Anita Stimson
Nelson Hogg	Bill Roberts
Sharon Hogg	Lavina Roberts
Barry Neubauer	Donald Saunderson
Janet Neubauer	Marjorie Saunderson
Penny Krassman	Dr. Shann Snedden
A. Murray Sihvon	Tanis Garden
Margaret Sihvon	Walter Sauve*
John Summerbell	Alex McDougald*
Freddie Summerbell	Anonymous 7
Dr. Ted Valli	Dr. Bill Taylor
Honourable Rob Renner	Nicolas Bachmeier*
Todd O'Reilly	Patrick Knight
Darlene O'Reilly	Kimberly Knight
Lavern Kurpuweit	
Mary Kurpuweit*	

*Note: Not sure what the Legacy Club is or how to become a Heritage Member?*

**Go to [www.mhcf.ca](http://www.mhcf.ca)**

## COMMUNITY FUNDS

### \$1,000 Plus

Les Mehrer Family  
 Malcolm & Janis Pritchard & Family  
 Mark & Kathy Carry  
 Marvin Woeffe Family  
 Meryl & Janis Goodfellow  
 Nelson & Sharron Hogg  
 Patty Horner  
 Paul & Judy Howe  
 Peter & Patricia Trzaska & Family  
 Peter Best Professional Corp.  
 Randy & Cathie Catalano  
 Roy & Dianne Hanson  
 Shane & Michelle Kohlman & Family  
 Suidan Family  
 Tay Hashizume Family  
 Tokle Family  
 TransCanada PipeLines Ltd.  
 V. Saujani Professional Corporation  
 Venumbaka Family  
 Vicki & Bob McCaig Family  
 Wayne Baum  
 Wilbert & Rose McKinley  
 Paul & Kim Murray and Family  
 Anonymous  
 Dr. E. LaVar & Elaine Jones  
 Leon's Schile/Towner Family  
 Marion McRoberts & Family  
 Allan & Betty McClelland Family  
 Brenda & Corrie Stolz Family  
 South Country Glass  
 Pat & Bruce Cooke Family  
 Tony Soo Professional Corp.  
 Daniel J. Smith Family  
 Mark Reinhardt Family  
 Brian Zollner Memorial  
 Peter & Evelyn Wilde Family  
 Ron & Sharon Getz  
 C.C. & J. Evangelos Family  
 Sihvon Carter Fisher & Berger LLP  
 Carpet One Fund  
 Clarence and Ruth Heringer Fund  
 Ada & John Hammel  
 Chinook Club of Irvine  
 Anonymous  
 Anonymous  
 Craven-Hall Fund  
 Ken Biemans  
 Raymond Gill  
 Bauman Fund

## Legacy Club

### MEMBERS 2010:

Henriette Piche	Criterion Catalysts & Technologies Canada Inc.
Al & Tanis Garden	
Murray & Margaret Sihvon	Leahann Rawleigh
Nora Way	Gilda Valli
Phyllis McLaughlin	Hargrave Ranching Co. Inc.
Ian McLaughlin	Ben & Kathy Hern
Denise Earl	Jean McDougald
Sandy & Jane MacKay	Jacque Penner
Cenovus Energy	Mark Lewall Professional Corporation
TELUS - Dollars for Doers	Harry Zeller
Rod Wutch	William P. Taylor Professional Corporation
Bob & Judy Herring	Uwe & Anke Krickhahn
Tom & Cathy Peter	Jerry & Diane Smith
Doug & Shirley Heine	Keith & Donna Crush
Kelly & Barb Byers	Shann Snedden
Kenneth Blair Professional Corporation	Hargrave Ranching Co. Inc.
James & Sharran Kungel	Brian & Gwen Rothwell
Craig Elder	
Lloyd & Audrey Olsen	

## COMMUNITY FUNDS

### \$1,000 Plus

Glen & Bonnie Christensen  
 Roy & Leona Neubauer  
 Peter and Marg Mazerolle Fund  
 D. Brand & Family  
 Albert & Yvonne Anctil Family  
 Bill Morrison Memorial Fund  
 Couillard Family  
 KR (Bob) & Joyce Lentz  
 Bruce, Janice and Jayne Dynes  
 Dr. H. F. (Mac) MacKenzie Family  
 Ken & Rita Graumans Family  
 Barry & Janet Neubauer  
 Don & Christa Cameron  
 Dr. Nick Douvis Family  
 Lt. G. "Bud" Olson Memorial  
 Pahl Livestock Ltd.  
 Conrad Sonntag Fund  
 Patterson/Harding Family  
 Gordon H. Sissons  
 Jeery & Diane Smith  
 Clem & Kathy Kuntz  
 Gene & Linda Weber  
 Rick & Bonnie Hanson  
 John Ignatius Memorial Fund  
 Thomas and Constance Sissons (Community)  
 Bill & Bobbi Dearborn  
 Elder Family  
 Bill & Marilyn Milroy  
 Tom & Cathy Peter\*  
 Wilkinghoff Family  
 George & Vera Kowalchuk  
 Wayne & Bernice Chesley  
 James & Sharran Kungel\*  
 Wenzel Family  
 Ethel Helgeson  
 BT Honda - Wayne Knodel & Eileen Lange  
 Transit Paving - Dean Dinning & Harvey Neigum  
 Wutch & Giddens Families  
 Jack & Carol Snedden & Family  
 Nandy Family Fund  
 Perry & Lois Yanke  
 Short Grass Ranches Ltd.  
 Ed & Bonnie Hole  
 Fred & Clara Weinheimer & Family  
 Rob & Sharon Lefever

## COMMUNITY FUNDS

### \$10,000+

Derbyshire  
 Ann Yuill  
 Un-named  
 Doug and Brenda Nerland  
 White Family  
 John & Mata Rinke  
 Doug & Shirley Heine Family\*  
**\$20,000+**  
 Jeff Peckham Family Fund  
 Vera Bracken Fund  
 Donna MacLean Fund  
 Lewall Family  
**\$30,000+**  
 G.W. & Lil Murray, Mack & Anne Murray,  
 and Families  
**\$40,000+**  
 Alex & Jean McDougald  
 Dean & Edna McKelvie  
**\$100,000+**  
 R.Hargrave and C.J. Mitchell Fund  
 Anonymous - Fisher  
 Lavern & Marianne Kurpuweit  
**\$500,000+**  
 Donald and Milta Hawthorne Fund  
**\$1,000,000+**  
 J.P. Ignatius

## DESIGNATED FUNDS

### UNDER \$5,000

Mack Higdon, Austin & Ethel Currie  
 John Ignatius Jenner 4H Multi Club  
 Fund  
 Armstrong & Havarad  
 - Rotary Music Festival  
 Cultural Alliance  
 Merelie & Melodie Armstrong Memorial  
**\$5,000+**  
 Big Country Allied Arts Association Fund  
 Thomas and Constance Sissons  
 Donna MacLean S.P.C.A. Fund  
 Bill Sellhorn Memorial Fund  
 Theresa Kope Memorial Fund  
 Alberta Legal Heritage  
 Rawleigh Family  
 Communities in Bloom  
**\$10,000+**  
 Donna MacLean Participation House -  
 Toronto Fund  
 Donna MacLean Museum Fund  
 Donna MacLean Grasslands Naturalists  
 Fund  
 Donna MacLean Library Fund  
**\$20,000+**  
 Donna MacLean Ontario College of Art  
 & Design  
 Donna MacLean Southern Alberta  
 MediAir Society  
 Donna MacLean War Amps Fund  
 Brock and Brenda Millions

## DESIGNATED FUNDS

### \$30,000+

Alex & Jean McDougald - Salvation Army Fund  
 Alex & Jean McDougald - Food Bank Fund  
**\$40,000+**  
 TX Ranches - Baseball  
 TX Ranches - 4H  
**\$90,000+**  
 Rotary Club of Medicine Hat Music Festival Fund  
 Rehabilitation & Employment for Developing  
 Independence  
**\$140,000+**  
 Lavern & Mary Kurpuweit Fund

## DONOR ADVISED FUNDS

### \$10,000+

Freedman Fund

### \$15,000+

Frost Family Fund

### \$25,000+

Niwa Family Fund

## FIELD OF INTEREST FUNDS

### \$5,000+

Margaret Houlston Hydrocephalus Fund  
 Brooks & Area Community Fund  
 Savanna Drilling - Brooks & Area Community Fund  
**\$10,000+**

Mayor's Community Fund

Megan Wahl Memorial

Roy and Elaine Wiedemann

### \$20,000+

Methanex Social Investment Fund

The Zelmor Fund

Growing Active Kids

Environmental Legacy Fund

### \$40,000+

Saamis (Medicine Hat) Teepee Association Fund

Claude Bishop Fund

### \$100,000+

Medicine Hat 2008 Alberta Summer Games Fund

### \$150,000+

Rural Youth and Recreation Fund

## SCHOLARSHIPS

### \$5,000 & UNDER

Eugene and Ruth Eaton Scholarship

Sara Michaud Scholarship

### \$10,000+

Dr. F.W. & Harriet Gershaw Fund

### \$20,000+

Zirka Ukrainian Dance Ensemble

Loretta and Joe Laycock Scholarship Fund

Drowning Ford Grazing Assoc.

### \$30,000+

Chief Gordon Earl Leadership Legacy Fund

Jardine Bursary Fund

### \$40,000+

Medicine Hat Canada Cup Society

Valli Family Scholarship Fund (The)

### \$350,000+

James & John McConnell Scholarship Fund

## YOUTH IN PHILANTHROPY

### \$1,000+

TD Canada Trust (YiP)

### \$5,000+

Snedden/Mayer Family (YiP)

### \$10,000+

Dr. Ken Blair Professional Corp. (YiP)

### \$40,000+

Lavern & Marianne Kurpuweit Fund (YiP)

### \$175,000+

Youth Endowment Fund (YiP)

## OPERATING FUND

### UNDER \$2,000

Rotary Club of Medicine Hat Sunrise

Royal Bank of Canada's Employee

Volunteer Program

Walt Sauve Memorial

McCoy Safe Grad 2005

MacKay Family Fund

Joan & Walt Sauve Families

Frew/Wannamaker Family

Snedden/Mayer Family\*

### \$2,000+

Myers Norris Penny Fund

White Family

Investors Group

### \$5,000+

Canada Trust Fund

Canadian Fertilizers

Gordon H. Sissons

Mayor Ted Grimm Roast Fund

### \$10,000+

Board and Staff Fund

Bauman Fund

### \$20,000+

William J. and Anne Morrison

### \$150,000+

Estate of Dorothy Joan Lehr

### \$450,000+

John P. Ignatius

Operating Endowment Fund

## AGENCY FUNDS

### UNDER \$1,000

Arts & Heritage Fund

Medicine Hat Family Service Fund

United Way of Southeastern Alberta

### \$2,000+

Big Brothers/Big Sisters Association of  
 Medicine Hat

### \$5,000+

Medicine Hat Public Library

### \$10,000+

Canadian Mental Health Association

-Alberta Southeast Fund

### \$20,000+

Friends of Medalta Society Fund

### \$50,000+

YMCA of Medicine Hat Heritage Fund

### \$100,000+

C.O.R.E. Association Fund

CORE Gilles Piche Memorial Fund

CORE Jason Mauch Memorial Fund

\*Indicates Legacy Club 2010 Member on listings pages 4, 5, 6, 7



# Helping Neighbours

In the summer of 2010 the Community Foundation started accepting donations for the Flood Relief 2010 Fund, in support of those affected by the devastating flooding in Medicine Hat, Irvine, Cypress County and surrounding areas. Total donations received were \$82,559.00. Among the first to donate were the Medicine Hat Realtors Charitable Foundation. Very generous donations followed from local businesses, service clubs, churches and caring local citizens.

Mike Christie, Executive Director of the Community Foundation, stated "it was amazing to watch citizens band together and pool their many resources to assist those so desperately in need after the June flooding."

While several organizations took care of flood victims' immediate needs, the board of directors of the Community Foundation decided to focus assistance on the mid to long-term needs of flood victims.

A utility rebate program was created in partnership with the Cypress County and the

City of Medicine Hat. The \$61,385 received assisted 43 County residents while the City of Medicine Hat received \$9,100 for seven Medicine Hat residents who were heavily impacted by the flood. The intention was to help them get through the coldest part of the winter.

In addition local community group Kid-sport received \$2,500 to provide five children the opportunity to participate in sports programs. Twenty Mile Post Historical Society accepted \$6,000 to go towards uninsured restoration costs which helped to keep the museum open. The Irvine Ag Society received \$3,574 for their generous support to Irvine during the worst part of the flood.

"We are very proud of the work we have done in Southeastern Alberta, beginning with that very first grant to the City of Medicine Hat for flood relief in 1995. This is why we are here" said Les Erikson, Community Foundation Board Chair (2010).

## Immediate Assistance Flood Fund Donors

### \$10,000+

Medicine Hat Realtors Charitable Foundation  
Johnston, Morrison, Hunter & Co.  
German Honorary Consul

### \$5,000+

Saamis Rotary Club

### \$1,000+

Alexandra School Council  
Lutheran Foundation of Medicine Hat  
TD Canada Trust  
Economic Development Alliance of Southeast Alberta  
Alberta Society for Sustainable Water Management  
and Related Technologies  
Big Country Agricultural Society  
Sterling Trailer Sales  
St. John's Presbyterian Church  
Lavern Kurpjuweit  
Medicine Hat Co-op Limited  
Elaine Wiedemann  
Davis Pontiac Buick GMC (Medicine Hat) LTD.  
Buffalo Ladies Friendship Circle

### \$500+

Dean & Edna McKelvie  
Don Reid  
Al Garden  
Barry & Janet Neubauer  
Mark & Kathy Carry  
Cypress View Foundation  
Original Joe's  
Big Boys Toys & Cycle Shop Ltd

### \$250+

Brian & Gwen Rothwell  
Janice Blair  
Shann P. Snedden  
Kelly Byers  
Saamis Employment Training Association

### \$100+

Len & Gladys Gieser  
Peter & Marg Mazerolle  
Gene Weber  
Yakimi Saka  
Beth Miner  
Trevor Lecuyer  
James & Sharran Kungel  
Sharron Lewis  
Ben Sayler  
Janice Neigum  
Bar JD Ranch  
Erv Hamilton  
Tammy Semenok  
Doreen Getz  
TD Canada Trust  
St. John's Presbyterian Church  
Medicine Hat Skateboarding Association  
David Rasmuson  
June and Gary Burns  
Medicine Hat & District Chamber of Commerce

## COMMUNITY FUNDS

### \$1,000 Plus

Art's Excavating  
John & Shelly McLeod Family  
Johnston, Morrison, Hunter & Co  
Porter Family Fund  
Kent & Patsy Walker  
Brian, Gwen & Erin Rothwell\*  
Randy & Linda Lehr Family  
Pat Valley Memorial Fund  
Don Weiss Family  
Park City Toyota  
Susan & Ken Feick Family  
Phyllis McLaughlin\*  
Bright's Prosthetic Laboratory Fund  
Richard & Lenore Kowalchuk Family  
Stein Family Fund  
Don Morris/Gas King Memorial  
Krickhahn Family  
Alex McDougald Memorial  
Comm Family Fund  
Hargrave Ranching\*  
Harry Zeller Family\*  
Gwen & Harold Congram  
David & Jean Nitchke & Family  
Burns, Valkenburg, Schwab  
Bill & Marg Taylor and Family\*  
Kelly & Barb Byers Family\*  
Ian & Phyllis McLaughlin\*  
Roy & Peggy Archibald  
Audrey & Lloyd Olsen

### \$5,000+

Arnold & Thelma Johnston  
Dr. Murray & Beryl Cowan  
Rotary Club of Medicine Hat Sunrise  
Carter Family Fund  
J & B David Fund  
Tom and Emmy Droog Fund  
Altwasser Family Fund  
Telus\*  
Criterion Catalysts\*  
Bob & Judy Herring\*  
Les Little Family  
Patzer  
Archie & Joan MacPhail Family Fund  
Kathy Mandeville and Ben Hern Fund\*  
Canadian Fertilizers Community Fund  
Valley Family  
Al & Tanis Garden and Family\*  
Wutch Family Fund\*  
MacKay Family Fund (Community)



## *The Financial Times...*

The past year (the 12 months covered by this report) has certainly been one of the best in terms of performance that we have experienced. Simply put we achieved a 12.9% return on investment.

This is very good news and for the first time since 2007 we are back in the black. In other words most of the investment gains erased our negative position. To be clear that means that the market value of the investment portfolio has exceeded the contributed capital.

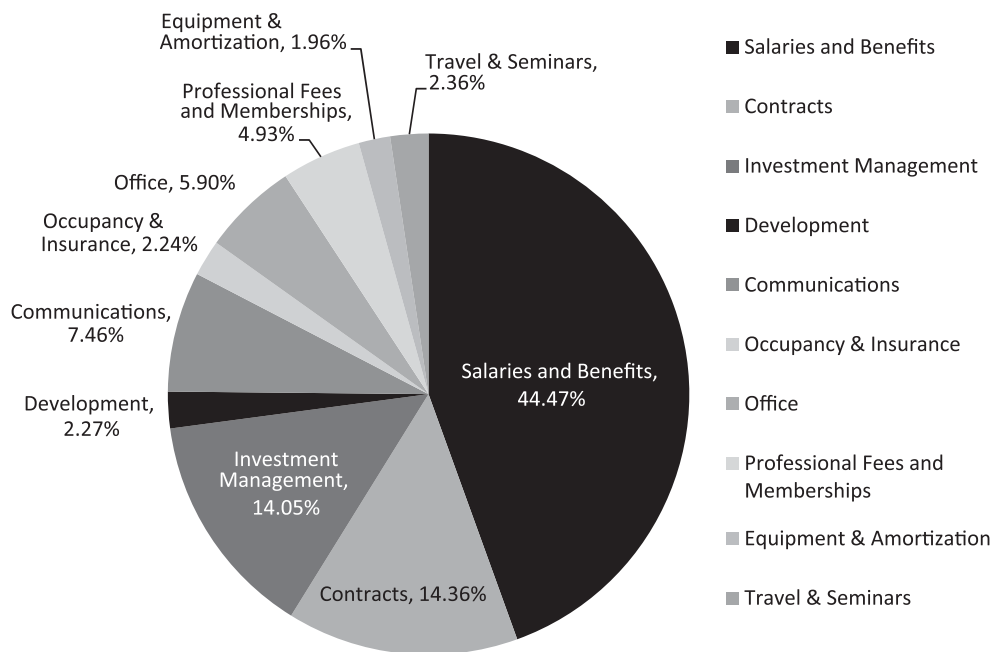
Part of this better result is due to the Foundation's discipline and rigour in setting policies and selection of investment manager. Certainly fluctuations in the markets are still with us and no doubt will continue for some time to come as the economy recovers. The Foundation will continue to carefully monitor the portfolio performance and adjust our strategies where necessary.

Grant making continued during 2010/2011 and returned to near normal levels. Details are

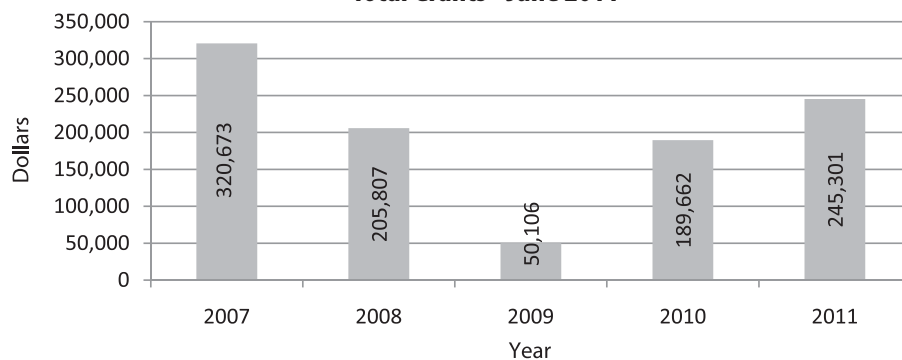
provided in this annual report.

A sound local economy and a good tax environment are essential elements to maintaining a high level of charitable giving not only to the Community Foundation but to the local charitable sector. Gifts of securities are still one of the most tax efficient methods of giving and if you would like to learn about this contact your professional advisor or the Community Foundation. Changes to the Income Tax Act announced in March 2010 federal budget gave greater flexibility in how charitable gifts can be used. Term endowments are now possible. As an example a gift of \$10,000 for a scholarship of \$1,000 per year for the next ten years is now possible with the Community Foundation. If you would like to learn more about terms endowments or have any other questions about the Foundation's financial performance, please contact the Foundation office at 403.527.9038.

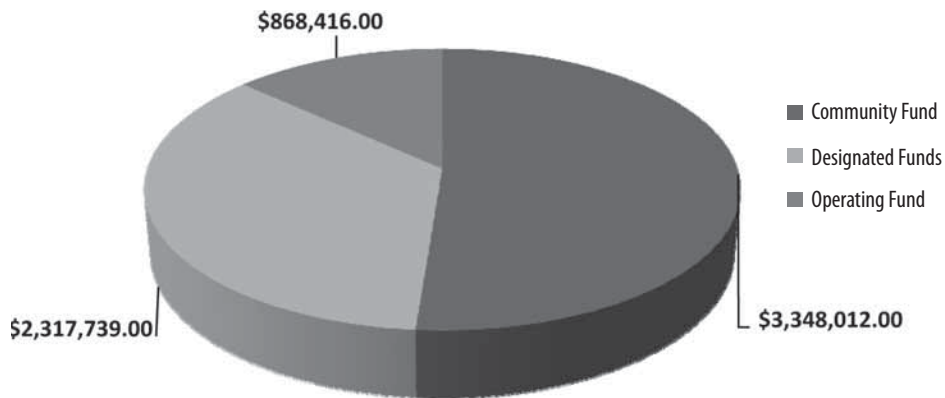
### 2010/2011 Administration Costs: \$269,256



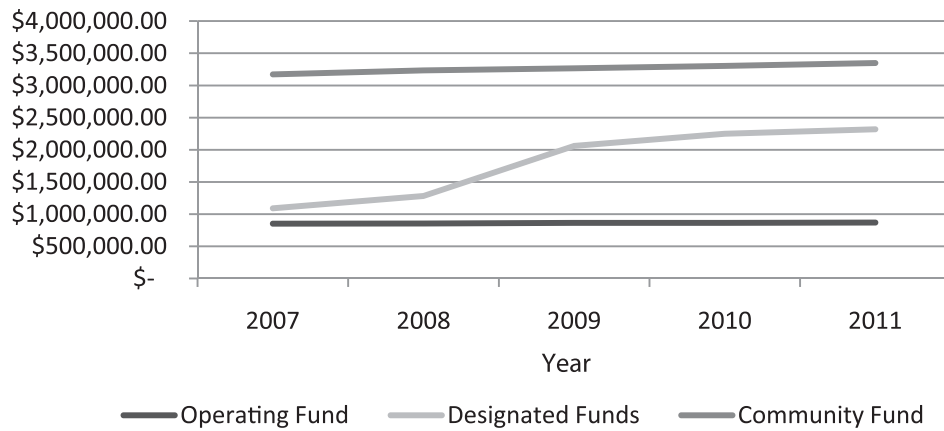
### Total Grants • June 2011



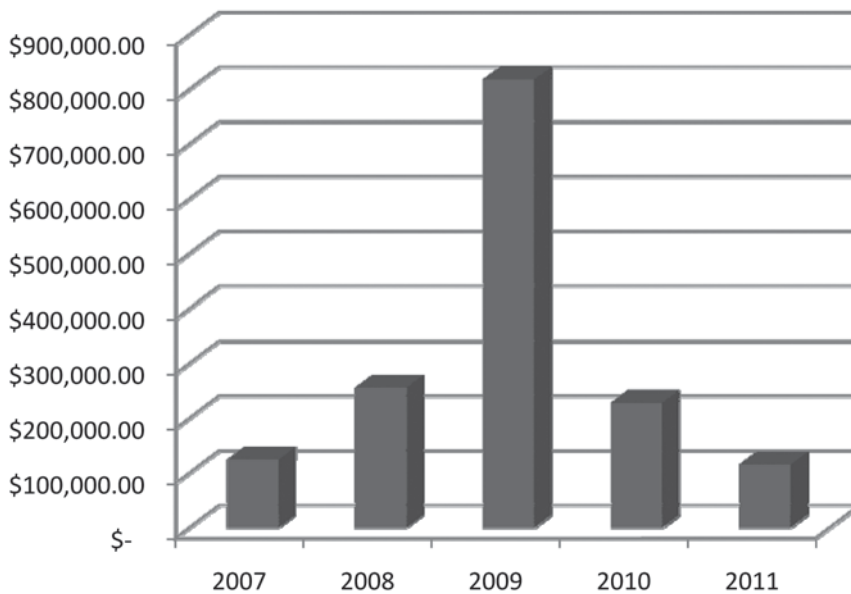
### Total Endowment Funds • June 2011: \$6,534,167



### Market Value • Total Endowment Funds • June 2011



### Total Donations by Year



# Fall 2010 & Spring 2011 Community Grants

ORGANIZATION	PROJECT/SPECIAL FUNDING	AMOUNT
• Alberta Easter Seals Society (Amount includes \$288 from the "Mayor's Community Fund")	Equipment & Support Services MH Project	\$3,000.00
• Alberta Science Literacy Association/ Praxis	Operation Minerva	\$1,500.00
• Prairie Gleaners Society (Amount includes \$877 from the "Environmental Legacy Fund")	Industrial Forklift	\$5,500.00
• Canadian Red Cross Society (Amount includes \$374 from the "field of interest" funds)	Barrier free access for building	\$2,700.00
• CORE	Kitchen Utensils	\$300.00
• SPEC Association for Children & Families (Amount includes \$164 from the "Brooks Community Fund")	Leaps in Technology	\$2,000.00
• Children's Wish Foundation (Amount includes \$353 from the "Elaine Wiedemann Fund")	Granting Wishes in the MH Community	\$2,500.00
• Miywasin Society (Amount includes \$841 from the "Growing Active Kids Fund")	Youth Development Program	\$5,000.00
• Big Country Agricultural Society (Amount includes \$2,500 from the "Rural Youth and Recreation Fund")	Crossroads Centre Storage Facility	\$7,500.00
• Kidsport (Amount includes \$5,153 from the "Rural Youth and Recreation Fund" & \$3,740 from the Medicine Hat 2008 Summer Games)	Continuing Funding	\$10,000.00
• #15 Air Cadet Squadron Sponsorship Committee	Activity Support	\$4,000.00
• Canadian Mental Health (Amount includes \$1,848 from the Claude Bishop Fund)	Computers and DVD Replacement	\$2,509.00
• Society of Friends of the Monarch Theatre (Amount includes \$935 from the Medicine Hat 2008 Summer Games)	Digital DVD Projector and Support System	\$9,107.00
• Medicine Hat Public Library	Microform Scanner/Digitizer	\$6,000.00
• Saamis Immigration Services Association	Concrete Repair	\$2,690.00
• Medicine Hat Catholic Board of Education (Amount includes \$1,420 from Saamis Teepee Association)	Aboriginal Day Celebrations	\$1,500.00
• Medicine Hat and District Citizen Advocacy Society	Community Advocacy Program (CAP)	\$6,500.00
• Persian Dreams and Canine Themes Rescue Society (Amount includes \$685 from Methanex Social Investment)	Feral Cat Colony Control Program	\$685.00

## Scholarships

ORGANIZATION	PROJECT/SPECIAL FUNDING	AMOUNT
• Zirka Ukrainian Dance Ensemble	Medicine Hat School District No. 76/ Medicine Hat Catholic Board of Education	\$733.00
• Lions Club of Irvine	Irvine School	\$170.00
• Dr. F.W. & Harriet Gershaw Fund	Scholarship Chosen by Family	\$446.00
• Valli Family Scholarship Fund	Grasslands Public Schools	\$1,268.00
• Drowning Ford Grazing Association	Prairie Rose School Division	\$805.00
• French Immersion	Medicine Hat School District No. 76	\$43.00
• James & John McConnell Scholarship	Chinook School Division - Nursing & Trades	\$12,459.00
• Baseball Canada Cup		\$1,321.00
• Chief Gord Earl Leadership Legacy Fund	Medicine Hat School Districts	\$978.00

# Designated Grants

ORGANIZATION	PROJECT/SPECIAL FUNDING	AMOUNT
• TX Ranches (John Ignatius) Medicine Hat Big League Baseball	Player Scholarships	\$1,479.00
• TX Ranches (John Ignatius) Cactus Country 4-H Club	4-H Member Scholarships	\$1,479.00
• John Ignatius Jenner 4H Multi Club Fund	Trophy for Grand Champion Calf	\$45.00
• Big Country Allied Arts Assn.	Oyen Public Library	\$166.00
• Rawleigh Family Trust	MHSD #76	
• Lavern & Mary Kurpjuweit	Health Foundation	\$1,641.00
• Lavern & Mary Kurpjuweit	Whispering Pines Camp	\$1,641.00
• Lavern & Mary Kurpjuweit	Church	\$787.00
• Lavern & Mary Kurpjuweit	Church	\$787.00
• Brock & Brenda Millions	Church	\$787.00
• Alex & Jean McDougald Fund	The Salvation Army	\$1,056.00
• Alex & Jean McDougald Fund	Food Bank & Services	\$1,089.00
• Dr. Robin Houlston		\$164.00
• Redi Enterprises	Endowment Distribution	\$3,466.00
• Freedman Fund	Symphonic Society	\$366.00
• Zelmor Fund		\$820.00
• Jardine Bursary	Special Areas	\$1,218.00
• Joe Laycock Scholarship	Special Areas	\$819.00
• Rotary Club	Various Awards	\$3,936.00
• Rotary Club	Managed Fund	\$654.00
• Legal Archives of Alberta	Alberta Legal History	\$210.00
• Donna MacLean, Bill Morrison, Peter Armstrong, Orv Kope	City of Medicine Hat Parks & Outdoor Recreation	
• Donna MacLean Grasslands Naturalists Fund	Communities in Bloom	\$248.00
• Donna MacLean Library Fund	Grasslands Naturalists	\$514.00
	Medicine Hat Public Library	\$546.00
	Purchase of Art Instructional Materials	
• Donna MacLean Museum Fund	Medicine Hat Museum & Art Gallery	
	School Art Annual Award	\$546.00
• Donna MacLean SPCA Fund	Medicine Hat SPCA	\$174.00
• Donna MacLean Participation House Fund	Participation House in Markham	\$382.00
	Their Choice - Use of Funds	
• Donna MacLean Southern Alberta MedicAir Society Fund	Emergency Medical Helicopter	
• Donna MacLean War Amp Fund	Service for Southern Alberta	\$764.00
• Donna MacLean Ontario College of Art & Design Fund	CHAMP Program	\$764.00
• Tom & Constance Sissons Fund	Scholarship to Support Life and Portrait Study	\$764.00
	Salvation Army	\$168.00

# Agency Grants

ORGANIZATION	PROJECT/SPECIAL FUNDING	AMOUNT
• Friends of Medalta	General Operating Expenses	\$758.00
• Big Brothers/Big Sisters	General Use	\$68.00
• Friends of the Family Foundation	General Use	\$36.00
• United Way	General Use	\$36.00
• YMCA	General Use	\$839.00
• CORE	General Use	\$34.00
• CORE - Jason Mauch Scholarship	Support for Art Program	\$155.00
• CORE - Gilles Piche Scholarship	Scholarship for CORE Staff	\$1,749.00



*Our grants at work:*

# *Roots of Empathy*

As innocent and pure as a newborn baby always is, it can be easy to forget just how rapidly they absorb their surroundings from the moment of birth. If a child is born into a negative environment they begin to adjust in a negative way, whereas if a child is shown the right way to treat and love others right from that first day, the likelihood is they will grow up and act accordingly. That's where Roots of Empathy comes in. It is a classroom-based program that assists infants and children alike in learning empathy. Over the past six years, new parents in Medicine Hat have been taking their babies into local schools and teaching children how babies respond to emotion.

"(This program) isn't there to teach anything to you parenting wise," says local Roots of Empathy representative Melanie Connellan. "It's actually teaching the baby. Essentially the whole thing is about improving empathy amongst kids, helping to reduce future issues like bullying and aggressive behaviour as they grow up." Connellan says the baby is also teaching the parent through this program. Because babies can only express their wants and needs through emotion, the baby needs to learn the best ways to do this, while the parent needs to learn what these different emotional signs really mean. Roots of Empathy also helps guide the parent and child toward non-aggressive responses to those feelings and to help create an early, unbreakable bond based on love and respect.

The Medicine Hat Roots of Empathy recently completed 15 programs within the region, including Brooks and Redcliff. In

order to provide that broad a service, and to ensure each family is given a dedicated, qualified instructor, money is needed for training. Thanks to \$6,000 from the Community Foundation, Roots of Empathy was able to train three new instructors, thus expanding the organization's capacity to provide its services.

"The entire amount from that grant went towards training instructors," says Connellan. "That really helped us to be sustained because we were kind of in limbo there. It just gave us that boost we really needed to move forward."



# Community leadership at work: Executive Directors' Network



by Mike Christie

The lead staff person in a charity or not-for-profit (NFP) organization often holds the title of Executive Director. Although as many of us in that role discovered recently the position title may also be CEO, General Manager or President. For the purpose of this article I will use the title Executive Director or ED for all my lead staff colleagues.

EDs are very different people with a wide range of skills and experiences. For example, the ED at the Women's Shelter has a social work background; at the Stampede Company a background in the agriculture world is obviously needed, and the same could be said for the Library, Chamber of Commerce, Economic Development or any of the other nearly 30 organizations that operate locally with a full-time ED.

The environment in which an ED must function contains as much, if not more, regulation than a private or public organization. An ED operating in the so-called third sector is surrounded by such things as: the Income Tax Act, CRA Regulations, Charities Accounting Act, Charitable Fund-Raising Act, PIPEDA, Trustee Act, Societies Act, Corporation Act, and I could go on, and all this is before considering regulations specific to the nature of business that the organization is involved in.

So having satisfied the legal framework, the ED must then ensure the organization has everything it needs to function. Recruiting good quality staff and somehow retaining them is always high on the agenda. However, for many, recruit-

ing and retaining volunteers is equally important and that includes Board Members and learning to work with a diverse group of people who are tasked with policy and strategy that the ED must then implement. So other items on the "to do list" include budgets, accounting, audit, insurance, computers and other information technology, marketing, grants and fundraising.

These are the type of issues that are common to all EDs and why the Community Foundation saw an opportunity to create a local ED Network. The membership is restricted to EDs in full time positions, who employ staff and who report to an independent board of directors. The concept is to have a safe place for EDs to share best practice and discuss issues that are common to everyone and learn from each other.

The ED Network first met just over a year ago. It was decided meetings two or three times a year would be sufficient to serve the purpose. I chaired the first meeting and as my ED colleagues arrived I realized that while I knew them all, they did not know each other. The meeting went well and as a group established the topics for discussion. As we concluded, I noticed two EDs are talking privately and agreeing on a joint partnership for an upcoming event. This is clear evidence to me of the value of networking or building social capital. The network has now met several times and like other similar professional networking groups will continue to assist EDs to operate in the regulatory quagmire and reduce the size of the dreaded "to do list"!



## MEDICINE HAT'S

# VitalSigns®

This year marked the fifth anniversary of Vital Signs in Medicine Hat. On October 4th Vital Signs was released nationally in 22 different communities. Each of these report cards is community specific and expanded on 11 issue areas from Health to the Gap between Rich and Poor to the Environment. Nationally there was a focus on many indicators including obesity and high school completion rates. Locally, the number of people considered homeless or at risk of homelessness was shocking to many.

Vital Signs is a tool that many community leaders and business people have come to rely on for information about Medicine Hat. Special to the fifth edition was its focus on the trends over the years using indicators from past reports. After five years we are able to see where we have been, how we are currently addressing key issues and where we are headed.

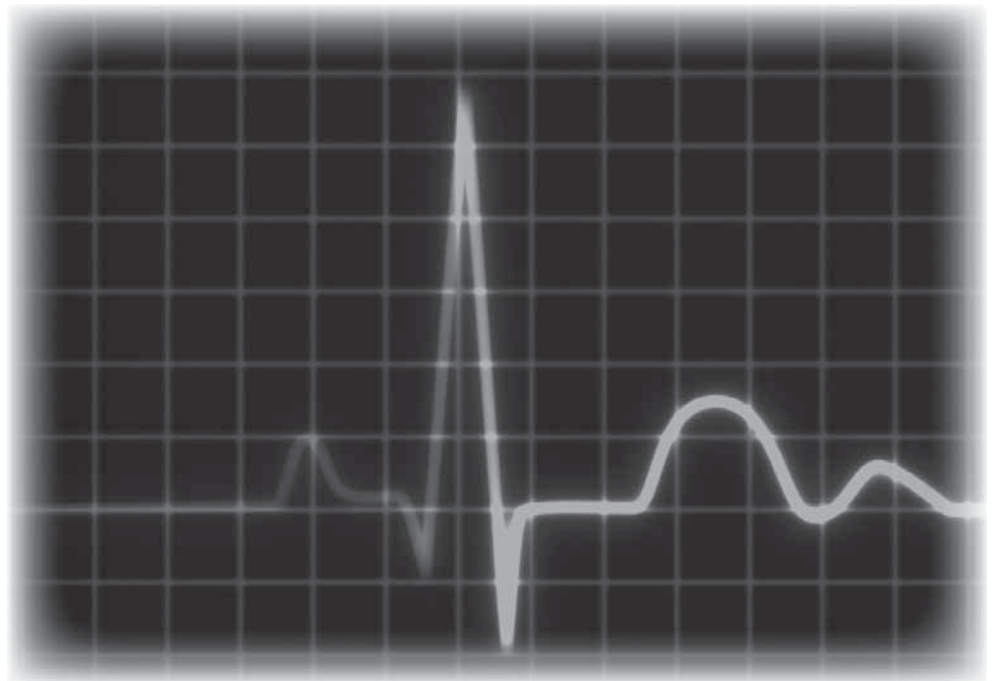
Vital Signs is more than a publication for the Foundation. The report allows us to understand the hot points in the community, allowing us to identify areas in which to focus our leadership role and grant making process. We take this publication very seriously and require grant applicants to indicate how their project will address issues in current and past reports.

As an extension of Vital Signs, the Foundation has created Vital Activity. Included in Vital Activ-

ity are Vital Munch and Vital Kids. Each of these programs take indicators discovered within Vital Signs and allowing members of the community to discuss these issues with concerned experts. For Vital Kids the Foundation staff takes Vital Signs to the classroom and discusses with students what is happening in the community.

The Foundation is very proud of the Vital Signs initiative and the leadership role it plays within the community. This year we were pleased to partner with Jim Pattison Broadcast Group on a series of clips aired on Chat TV. These clips included information about smoking, spit tobacco and healthy eating. Please watch for and participate in other exciting initiatives throughout the year. The Community Foundation creating a better community: Today, Tomorrow, Forever.

As special thank you to our sponsors this year: City of Medicine Hat, Meggitt, Canadian Western Bank, River Dental, Criterion Catalysts & Technologies, Medicine Hat College, Bernie Leahy Real Estate



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