

## Goings on

- The Foundation recently challenged community funders and dozens of businesses in the Yarrow Building to contribute consumables to *Project Connect*. A popular service fair, *Project Connect* is geared to helping the hundreds of people living homeless and in poverty in the Capital Region as they prepare for winter on the streets. The program provides one-stop access to a variety of services for people in need in the community.
- The Foundation is proud to announce its role as one of the founding members of the new Victoria Community Funders Network. One of the Network's goals is to encourage more collaboration in order to avoid duplication amongst community funders.
- As part of this year's *Victoria's Vital Signs*® launch the Foundation partnered with Victoria CoolAid Society and FrontRunners to feature world class marathoner Dick Beardsley as keynote speaker. Aside from delivering an emotive presentation to launch attendees, Mr. Beardsley also gave presentations at local high schools to deliver his message of the importance of youth involvement in the community.
- A record number of volunteers – from athletes and local celebrities to politicians and TC staff – raised money for education and literacy in this year's Raise-a-Reader campaign. The final tally was over \$239,000, including \$12,500 raised in the downtown core and at four participating Peninsula Co-op locations in Greater Victoria. Congratulations to the Victoria Foundation team who placed first for most funds raised.
- October 6th marked the fourth annual release of *Victoria's Vital Signs*®, our report card aimed at measuring the vitality of our city. Major issues facing our region were identified as homelessness, housing affordability and availability, and the ability to earn a living wage. Thanks to the support of the TELUS Victoria Community Board, our Vital Signs report included its first ever youth section. Indicator areas included in this section demonstrated just how aware youth are of their opportunities and challenges in our community. Go to [www.victoriafoundation.bc.ca](http://www.victoriafoundation.bc.ca) to find out more.

### Let us know

We encourage readers, on an ongoing basis, to submit letters or ideas for articles in *Connections*. Fax, call or write Shannon Drew-Burrows, Director of Communications with any suggestions.

The purpose of this newsletter is to provide information about ongoing activities at the Victoria Foundation and throughout the community. If you have any questions about the Foundation or would like to discuss making a gift, establishing a fund or applying for a grant, please contact:

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Are we addressing you correctly? Would you prefer that we send our newsletter via email? If there is a better way for you to receive the Foundation's information, just let us know. Please help us keep our mailing list accurate and your mailing method preference up-to-date by calling us or sending us an email at the contact information above.

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## Lots to think about



Sara Neely,  
Director of Philanthropic Services

The economic events around the world over the last year may have given you lots to think about. As you look at meeting the immediate needs for the well-being of yourself and your family, you may wonder what the future will bring. Perhaps you have reexamined your priorities of what is important – what you value most. While you may have simplified your life in some areas, you might also be looking at the “bigger picture” of your financial

well-being during your lifetime and the legacy that you can leave through their estate planning.

People often begin their planning when significant events and changing life circumstances occur in their lives. Marriage, divorce, remarriage and the addition of children or grandchildren, as well as the death of loved ones, can prompt the planning process. Significant financial events, such as the sale of a business or an inheritance, are other times when we think about the bigger picture.

This past year, the Victoria Foundation has seen an increase in the number of individuals who are thinking about the bigger picture of their own legacy giving. They see the needs in the

community now. By creating a designated fund at the Victoria Foundation, these individuals are ensuring the organizations they care about are also looked after in the future.

It is easy to do. Your Will provides for a charitable gift of a specific amount, or a portion of the residue of your estate, to your named fund at the Victoria Foundation. The designated fund agreement, signed during your lifetime, clearly sets out your intentions for the allocation of the annual grant from your fund to one or more federally registered charities in Canada. This gives you the flexibility to change the allocations during your lifetime without having to change the terms of your Will. At the end of your lifetime, when your estate gift is received into your fund, the Victoria Foundation's Board of Directors will ensure your wishes are honoured.

*Disclaimer: This information can help facilitate discussions between you and your advisor. It is not intended as legal or financial advice. We encourage you to seek advice from a qualified professional.*

Connecting people who care with causes that matter®

## Connections



VICTORIA  
FOUNDATION

#109 - 645 Fort Street Victoria, BC V8W 1G2

## CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER®



## Connections

The Victoria Foundation's Newsletter

Winter 2009

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## Reflecting on 2009

This has been an important year for the Foundation and we have participated in many exciting opportunities.

In February, we launched Every Step Counts (ESC), a running program for people experiencing numerous barriers and challenges. Born from a vital grant, this program enables participants to draw on the many benefits of running and team work to foster self-esteem and positive growth.

In October, we unveiled *Victoria's Vital Signs*®. Over 270 youths embraced the chance to take part in a new section we included to provide a voice for their thoughtful and articulate comments and suggestions.

During the economic recovery, the Foundation worked to improve its ability to be responsive to inevitable changes in the future. On October 29th revisions to the Victoria Foundation Act received Royal Assent. These changes to the Act will enable us to balance the protection and purchasing power of the endowments with the needs of the community today and tomorrow.

We are pleased to report our investment returns for 2009 to September 30th climbed to just over 13%. Moving forward we will continue to follow our prudent, long-term investment policy and adhere to another year of cautious spending. Our granting rate for 2010 will be 3.0%.

As 2009 winds down, I would like to thank out-going Board members Tom Burley, Deborah Curran and Janet Erasmus, as well as our out-going Chair, Chuck Burkett. I would like to welcome our new Chair Steve McKerrell, and new Board members Sandra Harper, Andrew Jackson and Mark Litwin.

In closing, I would like to thank all our donors, of every capacity, as it is through their continued support that the Foundation is able to demonstrate the on-going importance and impact of philanthropy in our community.



Sandra Richardson  
CEO



VICTORIA  
FOUNDATION

## Vital grants

In late October the board approved close to a half million dollars in discretionary grants to 41 local organizations. Here is a small sampling of some of these great grants that link to our Vital Signs priorities and broad fields of interest:

### BC Families in Transition \$20,010

To assist with piloting First-Response Services for High-Conflict Families and provide crisis intervention, vital information and counselling referrals to 12,000 CRD residents.

### Together Against Poverty Society \$11,200

To create a new case for support, donor materials, and a more accessible website as part of strategic planning, and provide workplace training of TAPS volunteers drawn from low-income people with disabilities.

### Mayne Island Conservation Society \$8,500

To coordinate volunteers with the Island's eelgrass habitat monitoring program and forage fish spawning surveys and map kelp forests as part of the community's plan to conserve threatened marine ecosystems.

### Belfry Theatre \$9,500

To support outreach efforts and the SPARK Festival of "mini plays" featuring local emerging artists, play readings, and Belfry 101 Live – a new piece of theatre conceived, developed and presented by high school students.

### Friends Living and Learning Through Loss \$10,000

To enable two additional educational, healing and supportive programs to youth ages 13 to 18 years experiencing issues of grief and loss. The program is free and open to those who may otherwise not have access to healthy avenues for discussing and dealing with bereavement.

### Hulitan Social Services \$20,010

To enable a support worker to work with inner-city families in the new George Jay school pilot of the Journeys of the Heart – a cultural educational program for preschool Aboriginal children.

## Tsay Keh Dene First Nation establishes \$16 million endowment fund

Following the ratification of the final agreement and subsequent one-time \$21 million payment from BC Hydro, the Tsay Keh Dene First Nation announced that just over \$16 million of the payment has gone towards the establishment of an endowment fund with the Victoria Foundation. The Tsay Keh Dene First Nation will also receive annual payments of approximately \$2 million from BC Hydro, with future adjustments for inflation. The Victoria Foundation will provide Trustee Services to Tsay Keh Dene for these funds as well.

The agreement reached between Tsay Keh Dene, BC Hydro and the Province addresses historic damages stemming from the creation and operation of the W.A.C. Bennett Dam and the Williston Reservoir. The reservoir, which was created by the construction of the W.A.C. Bennett Dam that was completed in 1967, is the largest body of water in British Columbia and the ninth largest man-made lake in the world.

The Tsay Kay Dene First Nation, based in the Peace River Valley, traditionally travelled by river, which allowed them access to food and provided them with a way to communicate with the surrounding communities. The construction of the dam and reservoir flooded out the Tsay Keh Dene community at Fort Grahame, forcing the First Nation to move elsewhere in their traditional land. The flooding also destroyed traditional hunting grounds, gathering sites and burial grounds.

"We are pleased with and proud of our relationship with Tsay Keh Dene First Nation," said Victoria Foundation Board Chair, Chuck Burkett. "We look forward to building on this relationship through the creation of positive change and broad reaching benefit for their community."

Returns from the \$16 million endowment will be used by Tsay Keh Dene First Nation for community related purposes, including:

- economic and social welfare
- health care facilities and programs
- education facilities and programs
- cultural facilities and programs
- community facilities and programs
- recreation facilities and programs
- other benevolent and charitable enterprises for the benefit of Tsay Keh Dene, and
- general administration and governance of Tsay Keh Dene.

Victoria Foundation CEO Sandra Richardson added, "The commitment between Tsay Keh Dene First Nation and the Victoria Foundation exemplifies the history the Foundation has of supporting the development within Aboriginal communities. As we move forward, we will work together to ensure that the outcome of this collaboration creates beneficial opportunities for the Tsay Keh Dene community now and on a long-term basis."

## Provincial funds update

### Former youth in care receive funding for education

One hundred and eighty-six youth formerly in government care received over \$1 million this year to assist them in pursuing post-secondary education and training. The funds are from a Youth Education Assistance Fund held by the Victoria Foundation.

The Youth Education Assistance Fund provides up to \$5,500 a year for up to four years for expenses such as tuition, books or living expenses while attending college, university or vocational training.

Since 2002, the Ministry of Children and Family Development has provided the Victoria Foundation with \$7 million for the Youth Education Assistance Fund. With distributions of \$4.7 million and a fund balance of \$3.2 million, an additional \$900,000 will benefit former youth in care as a result of this fund being invested and managed by the Foundation.

### Scholarship Society awards over \$250,000 to Aboriginal students

Working in partnership with the Victoria Foundation, the Irving K. Barber BC Scholarship Society provides scholarships to students attending public post-secondary institutions both throughout the province and internationally.

As a result of a new program designed to improve Aboriginal access and achievement, 94 BC Aboriginal students received awards of \$1,000 – \$3,500 each for study in British Columbia this fall.

In announcing the awards, Society Chair Jim Reed said, "These awards are an investment in the skills and talents of BC's Aboriginal students."

In addition to the Aboriginal awards, this fall the Society has awarded:

- Sixteen scholarships of \$5,000 each for students transferring from one post-secondary institution to another to complete their degree,
- Two scholarships of \$10,000 each for students from China to study in BC, and
- One scholarship of \$20,000 for a BC student to study abroad.

To date, the Society has awarded over \$2.2 million in scholarships.



Tanner Shaw and Nicholas Fuches, Transfer Scholarship recipients

As the giving season approaches, are you considering a gift to your fund or a pass-through gift of cash or publicly-traded securities to provide an immediate benefit to an organization? If you are contemplating a gift of securities, please contact us before December 11 to ensure a 2009 tax receipt.

## More than money

Responding to granting inquiries in 2009 often involved creative solutions. Our community advisors volunteered countless hours at non-profits – assisting with strategic planning, budgeting and more. Foundation staff also came forward to assist in ways that went beyond the scope of their usual roles.

A stand-out example is the work of Foundation IT Manager, David Heron, who sprang into action when our IT support organization asked if he knew of any non-profits that could use donated computers. With numerous "hand-me-downs" available, Heron facilitated the donations in his spare time.

"It was an easy project," said Heron. "Not all non-profits have access to computers and I knew that often the ones they had were so dated, they were more of a hindrance than an asset!"

Once deemed "clean," Heron loaded the systems with Open-Source Office software. Recipients could then provide services such as outreach, IT training and job searches to their clients.

To date, 27 systems have benefited 11 organizations throughout Vancouver Island.



## Please contact me

**I am interested in the Victoria Foundation! I would like to learn more about:**

- How I can support my favourite charities right now with a pass-through gift to the Victoria Foundation
- How I can make a charitable gift of publicly-traded securities
- Establishing a named fund
- Including the Foundation in my estate planning
- 1% For The Planet
- Youth in Philanthropy

**My area of interest is:**

- Arts, Culture & Heritage
- Community Service
- Education & Literacy
- Environment
- Health & Recreation

- I would like to add \$ \_\_\_\_\_ to my existing fund.
- I would like to give \$ \_\_\_\_\_ to the Victoria Fund.
- I would like to make a pass-through gift of \$ \_\_\_\_\_ to \_\_\_\_\_ (name of charitable organization)

Name \_\_\_\_\_

Address \_\_\_\_\_

Postal Code \_\_\_\_\_ Phone # \_\_\_\_\_

Email \_\_\_\_\_

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