

OKANAGAN COLLEGE FOUNDATION

Annual Report 2009/2010

empowering the promise



Lisa Plamondon
2010 Governor General's Silver Academic Medal Winner



The Difference Makers

We believe in students. Every year we see the power of helping, whether it is funding a semester of tuition fees, putting food on the table, or equipping a classroom or building. Okanagan College Foundation exists to help students succeed. In 2009/10, nearly 1700 students received \$1 million in support in the form of bursaries, scholarships or other awards. That support may be a starting point for a student entering a program or emergency aid to help someone through a crisis and complete their studies. Often it is a life transformed.

We are also dedicated to supporting the College as it develops the innovative teaching spaces and technologies it needs to deliver new and existing programs.

Our Campaign efforts have largely focused on the Centre of Excellence in Penticton. It is a world-class \$28 million building focused on leading edge sustainable building technologies and Renewable Energy Conservation. We need to raise \$5 million to provide the additional funding to complete and outfit the building.

The common denominator of the Foundation's work is the community of generous donors who are the difference makers.

Your contribution multiplies in the long-term as students graduate and become the new generation of health care workers, trades people, technologists and business owners, providing services and new wealth in the communities where they live and work. You make a difference, one person at a time.

Thank you for investing in our Foundation and the next generation of learners, buildings and programs.

Powerful Results

Thanks to our generous supporters, since 2005 Okanagan College Foundation has:

- Awarded nearly \$3.4 million in scholarships, bursaries and other awards to over 4300 recipients
- Built an endowment that exceeds \$6.8 million
- Recognized over \$3 million in gifts planned to be received in the future



Steve Tuck
President



Kathy Butler
Executive Director

Believing in Katrina

Katrina Neufeld always wanted to be a nurse. While working full time in a support position at Interior Health, Katrina's pursuit of her goal began when she started taking evening classes at Okanagan College to give her the prerequisite courses she needed. When her boys turned 17 and 20, Katrina's dream became a reality as Okanagan College accepted her in the Practical Nursing program in September 2009.

A full year of study and practicums, it is a demanding program, leaving precious little time for family and a paying job. It is a lot to cover in one year given the increasing level of skills required and workload of the profession.

Katrina is one of 24 students in the class based at the Kelowna campus. There are also classes offered in Penticton, Salmon Arm and Vernon. Okanagan College currently enrolls 134 Nursing students each year throughout all four regions. It is a popular program with over 540 qualified applicants this past year. Our graduates experience almost 100% employment rate in many areas of health care. As retirements in health care increase there will be an even greater demand to meet the need for skilled nursing professionals.

For Katrina, it was extra hard as an upgrading program through her employer and union was discontinued, leaving her with even less funding than planned. Nearing the end of her program and her financial resources and contemplating returning to work, Katrina learned that she was the recipient of the Gorman Bros. Lumber Rotary Club of Kelowna \$5,000 bursary.

The bursary helped ease the financial hardship she and her family faced and allowed her to concentrate on her studies.

"This generous bursary will allow me to achieve my ultimate goal to graduate from the Practical Nursing program at Okanagan College, which may not have been financially possible without this support."

– Katrina Neufeld



A Student's Story - Lisa Plamondon

For one Okanagan College accounting student, her education was all about the numbers – the scholarship numbers that is. Lisa Plamondon knew at the age of 16 that she wanted to pursue a career in business and accounting after job-shadowing her older sister. After graduating as the Valedictorian and Governor General's Bronze Medal recipient of Immaculata Regional High School in Kelowna, Lisa headed off to Okanagan College to pursue her degree at one of Canada's best business schools.

However, Lisa grew up in a single parent family, and college tuition was not in the budget. "Education was very important to my mother, and she really pushed for my sister and me to pursue post secondary education" said Lisa. So, instead of putting her dreams of conquering the corporate world on hold, she began looking for alternative sources of funding, including student loans. With her sister acting as a mentor, she soon discovered that the Okanagan College Foundation was a veritable treasure trove. The Foundation's website became a regular haunt for the rising young star who applied for every scholarship and bursary she qualified for – and even a few she didn't – en route to her degree.

In the four years she attended Okanagan College to earn her Bachelor of Business Administration, Lisa only paid for one semester of tuition personally. "I never had to worry," she said. "Every November, I knew there would be two or three envelopes waiting for me." This enabled her to focus on her studies, leading her to graduate as the top student in the institution in June 2010. Her hard work literally paid off, and she was awarded the Governor General's Silver Academic Medal and Business Administration Medal at her convocation.

Lisa admits that college is a balancing act. "It was nice to know that my tuition and books were covered by scholarships both by the Foundation and other sources." This allowed Lisa to dedicate time to giving back to her community, and attend various events sponsored by the CGA Association of BC and CFA Okanagan Society.

Lisa is thankful for every moment of her time at Okanagan College. "I had a fantastic college experience. The smaller class sizes enabled me to become actively involved with my courses, and I was able to forge relationships with my professors and peers." The result: She's graduated into an accounting position with MacKay LLP Chartered Accountants straight out of school with minimal debt, and is actively pursuing the Certified General Accountant designation.

The string of awards Lisa received was lengthy and when all is said and done, it was enough to keep the accounting specialist in the black and on a path to a very bright future.

"My education has been invaluable and has helped me to make the transition into the business world, but I could not have attained my degree without the support of my family, scholarship donors and the Okanagan College Foundation."

– Lisa Plamondon

Lisa Plamondon with Don Turri

Ed Schratter Giving Back

It's difficult for anyone, strong student or weak, athletic phenomenon or one with an artistic streak, to get started in life without a few skills to fall back on. This is where the community college can help and Vernon-based Fulton Secondary School teacher Edward Schratter says he is a prime example of why a college education proves a solid investment. As the son of math teachers, this proud math (and sometimes physics) instructor knows that learning is a very powerful tool.

His father, Jack Schratter, taught math and physics for Okanagan College and has a memorial endowment established in his name which generates an annual award for a Kalamalka campus student pursuing a career in math, physics or engineering.

The family believes strongly in the education the College has to offer and Ed says he is sure his experiences on the smaller campus set the stage for his success. He now sits on the institution's North Okanagan Advisory Committee helping make the connection for this new generation of students.

"I'm a big believer that small colleges do a lot for our kids," he said. "I know I just got a really good foundation so that when I went to university, I was ready to take it on." With smaller classes, closer to home, the College offers students a chance to ask questions and really learn the material they are working on, whatever the subject matter, before moving to the university system. "It's more conceptual learning and less rote learning," he said. "It's hard for professors to spend any time with individual students whereas at the College, the instructor can make sure you really understand the material."

Heading to Okanagan College first helped ensure he had a grasp of the fundamentals of the math he was learning before he was expected to sit in a lecture hall with hundreds of other students to learn new concepts. And as an added bonus, it saved him a lot of money – a point he likes to make with his own students. Schratter makes a point of talking to his classes about that time period after high school. With the right foundation, many of his average students can go on to make great contributions to their community, he says, noting he thinks the college system is often a better option to help students develop as people, before they are expected to take on adult life in a place far from home.

Back when Schratter went to school, tuition and books cost significantly less. With tuition and cost of living what it is today, making ends meet is significantly tougher for the students he now teaches, he said. This is part of the reason the Okanagan College Foundation was established. The Foundation helps students with bursaries and scholarships to help offset the cost of getting their first few years of post-secondary education under their belts.



Clare McManus & Michael Griffin

From the moment she left high school, Clare McManus wanted to be a teacher. An early aptitude test pointed her towards a career in computer science, but McManus chose her path to psychology early. "Teaching, to me, was always a dream," she said. "I believe really strongly that teaching is a way of helping the next generation come along and explore ideas and develop values that will promote a good society."

As a college professor in the psychology department of Okanagan College, McManus got to shape that process. Psychology, she believes, is one of those areas every educated person should know something about and a subject almost any student finds interesting. Her partner, Michael Griffin, who worked as an English professor at the College, had a different take on their work. "It gave me an opportunity to read," he joked. "But it really did turn out to be a good thing. Teaching was something that I really enjoyed."

After retirement, the pair began working with the Okanagan College Foundation to set up a scholarship for college students going on to university. "I spent my whole adult life teaching people university courses and I really believe in the value of that kind of education, no matter what field you go into," said McManus.

Their donation will be made posthumously and the Foundation will ensure it goes to a student who proves both need and merit. It's a lasting way to give to a cause they dedicated their lives to and know that future generations will continue to benefit from their work.



Gifts by Will

The most common planned gift, a charitable bequest, is a donation made through your Will. By designating the Okanagan College Foundation as a beneficiary in your Will, you can create a lasting legacy for the future without diminishing your assets today.

A Will enables you to distribute your money and property exactly as you choose, securing your family's financial future and acknowledging individuals and organizations by specific bequests.

A bequest to the Okanagan College Foundation can provide a tax benefit to your estate and can take one of the following forms:

- An unrestricted bequest allows Okanagan College to use your gift where it is needed most
- A restricted bequest is a gift with a specific purpose. You may, for example, specify the gift be used for a particular area of interest in a specific school, such as scholarships and bursaries.

If you plan to include the Okanagan College Foundation in your Will, we would like to hear from you. We can then review the terms of the bequest with you to ensure that we will be able to comply with your wishes.

Gifts can range from a cash donation to more complex gifts, such as property, publicly traded securities, specific assets or personal possessions.

If you are interested in funding student awards, your gift could become a prize, award or scholarship, all of which are awarded to students on the basis of academic achievement; or a bursary which is awarded to students based on their financial need. In addition, your gift may be an endowed fund, named for yourself, a friend or family member. In this scenario, only a portion of the earned income is used, thus allowing your gift to continue in perpetuity.

There are several options for determining the amount of your gift. Some donors prefer to state a specific amount in their Wills. Other donors give a specified portion of their estate. Through a bequest you may be able to contribute at a significantly higher level than you thought possible – building a lasting legacy for education.

We would be pleased to assist you and your lawyer or notary with bequests to the Foundation. This assistance includes providing you with customized sample Will wording for your gift to Okanagan College Foundation as well as information on endowments, student awards, capital project opportunities and the array of other funding possibilities that exist on campus.



For further information on leaving a bequest or any other planned giving method, please contact:

Anne Kirkpatrick
Telephone: (250) 862-5630
Toll Free: 1 (888) 650-6968
Email: plannedgiving@okanagan.bc.ca



Ron and Priscilla Russell

In Memory of Ron Russell

We were deeply saddened by the sudden passing of Ron Russell on January 27, 2010. He was a good friend of Okanagan College and the Okanagan College Foundation, including participating on the Foundation's Planned Giving Advisory Committee. We were very fortunate to benefit from his caring counsel and friendship over the years.

In Memory of John Patrick Moss

In 2009, Okanagan College Foundation was the recipient of a legacy gift from John Patrick Moss, a long-time Kelowna resident who was engaged in the community in many ways. His bequest will go towards the College's award fund for distribution to worthy recipients. Student support is an investment in our youth, the future entrepreneurs, innovators and leaders who will see the Okanagan prosper and grow. Mr. Moss' legacy will help our students achieve their dreams and at the same time help ensure our communities stay strong and vibrant for generations to come.

Centre of Excellence Campaign

The Okanagan College Centre of Excellence in Sustainable Building Technologies and Renewable Energy Conservation, now under construction in Penticton, will play a fundamental role in keeping young people and future leaders in the region. If the Okanagan is to grow and prosper we need to address the fact it has a growing aging population and will experience a larger labour shortage than other parts of the province in the next decade. Statistics also indicate a trend of 19 – 26 year olds leaving the Okanagan Valley for advanced education or job opportunities – many of them never return. The Centre of Excellence is an answer to the challenge.



CEI Architecture Planning Interiors

The Centre will...

- Provide additional space for more students to enrol in new and expanded courses
- Create more opportunities for students to study and stay in the area and subsequently become future business and community leaders
- Address workplace demands for more job ready graduates with expertise in green building technologies, sustainable construction techniques and energy conservation in British Columbia, throughout Canada, and internationally
- Contribute to the College being recognized by potential students and the construction industry as the foremost place to study green and sustainable construction
- Facilitate the research, development and commercialization of new approaches and methods of building construction and alternative energy production, including new start-up companies in the Okanagan Research Innovation Centre incubator
- Lead to increased buying power of more students, staff and faculty, maintaining the College's reputation as a major economic driver



Supporting the Centre

The Centre of Excellence \$5 million fundraising campaign will go a long way in helping the College educate and train more students who will choose to live in the South Okanagan. Graduates will see an exciting future ahead for themselves and their families, due in part to the opportunities and doors opened to them by the expansion of Okanagan College through the Centre of Excellence.



Yasmin and Rick Thorpe,
Honorary Co-Chairs



Campaign Leadership

Yasmin and Rick Thorpe, *Honorary Co-Chairs*
Jim Henderson, *Campaign Chair*
Doug Carnegie, *Canadian Home Builders' Association South Okanagan*
Jane Drapeau, *Manager, National Bank Financial*
Chris Gibbons, *Finance Manager, Westhills Aggregates Ltd.*
Walter Huebert, *Chair, Regional Advisory Committee*
Brian Hughes, *Investment Advisor, RBC Dominion Securities*
Randy Kowalchuk, *President, The Benchlands Naramata*
Jonathan Kruger, *Chief, Penticton Indian Band*
Andre Martin, *General Manager, Penticton Herald*
Barry Reid, *Senior Consultant, PERC*
Donna Lomas, *Regional Dean, South Okanagan-Similkameen*
Kathy Butler, *Executive Director, Okanagan College Foundation*
Anne Kirkpatrick, *Development Officer, Okanagan College*



Jonathan Kruger, Chief, Penticton Indian Band

The opportunity for band members to become more involved in the trades and business communities is what led Jonathan Kruger to become involved.

"More spaces means that more of our band members can upgrade or change careers without having to move away from home and that's very important as home is a very special place for us," he points out. Jonathan feels that the Centre's expansion will encourage more of his band members to pursue an education particularly as Okanagan College offers such a diverse variety of educational opportunities. "Anything to make it easier to get an education is welcome by everyone, not just our band members."

For information or to donate visit www.okanagan.bc.ca/centreofexcellence

Or contact:
Donna Lomas

Regional Dean, South Okanagan Similkameen
Okanagan College, 583 Duncan Avenue West, Penticton, BC V2A 8E1
(250) 492-4305, ext 3216 • Or the Okanagan College Foundation 1 (888) 650-6968

Friends of the Centre of Excellence

We are grateful for the support already received for the Campaign for the Centre of Excellence.



A \$150,000 donation from the BC Wine Information Society pushed the \$5 million Centre of Excellence fundraising campaign over the \$1.4 million mark at the end of March 2010. BC Wine Information Society Board President, Keith Bevington, says the Society's donation reflects the importance it places on the College and in particular, what the Centre of Excellence will bring to the area.

(Left to right) Jim Hamilton, President, Okanagan College; Lance Kayfish, Chair, Okanagan College Board of Governors; Keith Bevington; Jim Henderson, Campaign Chair.

FortisBC announced a \$50,000 contribution to support the Centre of Excellence campaign. The donation will create a dedicated classroom for students entering the electrical apprenticeship program. Joining the announcement are electrical students from Okanagan College.

(Left to right) John Walker, CEO and President of FortisBC and Terasen Gas Inc.; Jim Hamilton, President, Okanagan College; Jim Henderson, Campaign Chair and Steve Tuck, Foundation President.



RBC Royal Bank announced its \$135,000 contribution in March saying, "RBC is pleased to join the growing network of community-minded donors, both citizens and corporations, who share a vision for education, innovation and sustainable growth in the Okanagan."

(Left to right) Karen Borring-Olsen, Regional Vice President RBC Royal Bank; Barrie Pachenski, RBC Vice President; Lance Kayfish, Chair, Okanagan College Board of Governors; Jim Henderson, Campaign Chair; Jim Hamilton, President, Okanagan College.

Organizations:

Andrew Sheret Limited
Astral Media Inc.
BC Wine Information Society
Black Press
BMO Financial Group
Canadian Home Builders' Association South Okanagan
City of Penticton
Diamond Jubilee I.O.D.E. (Violet Tea)
Forever Young
FortisBC
Investors Group
National Bank Financial
Osoyoos Indian Band
Pattison Sign Group
PCL Constructors Inc.
Penny Lane Society
Penticton Auto Dealers Association
Penticton Board of Trade Building Association
The Okanagan Valley Newspaper Group
Penticton & Wine Country Chamber of Commerce
RBC Financial Group/RBC Foundation
Ramada Inn & Suites and Coast Penticton Hotel
Real Estate Foundation of British Columbia
RONA Foundation
TELUS Communications Inc.
TELUS Corporation
Valley First Credit Union
Windsor Plywood

Individuals:

Robin & Janice Agur
Kathleen A. Butler
Susan G. Connaghan
Jim Cookson
Debbie M. Cutt
Robert Dantzer
Jackie Dewar-Pine
Jane Drapeau
Joanne H. Grimaldi
Jim & Elizabeth Hamilton
Kathy Hamilton
Norman & Yvonne Harding
Jim & Sandra Henderson
Annie Hillard
Walter Huebert
Brian Hughes
Steve Jenkins
Sandy & Gerry Karr
Anne Kirkpatrick
Tony & Judy Lloyd
Donna Lomas & Tom Beardsley
Andre Martin
Barry McGillivray
Ben & Laurie Minuk
Clifford Nelson
John H. Pankiw
Roy & Marlene Phillips
Barry C. Reid
Frank A. Richter
Harold & Donna Schellenberg
Robert Searle
Sheilagh Seaton
David & Janet Shaw
Mary C. Seipp
Dave Smith
George Solomonides & Family
Steve & Terry Tuck

Plus anonymous donors

Canadian Home Builders' Association South Okanagan contributed \$10,000 to the Centre of Excellence and \$3,000 for new student awards.

"We believe this is an important investment in the future of our youth and of this region recognizing that investing in students and in the construction of the Centre of Excellence will deliver a large payback to the local economy."

– Michelle Price, President



(Left to right) Randy Werger, Associate Dean of Trades and Apprenticeship at Okanagan College; Donna Lomas, Regional Dean, South Okanagan-Similkameen; Michelle Price, President CHBA South Okanagan; Doug Carnegie, Treasurer CHBA (also member of the Campaign Committee).

Expanding Student Opportunities

Donors established 17 new award funds between April 1, 2009 and March 31, 2010.

Endowments

- CGA - BC Educational Foundation Fund
- Creative and Performing Arts Awards
- Harley Biddlecombe Legacy Award
- Jacobsen Pontiac Buick Lou Simonelli Achievement Award Fund
- Leo and Peggy Plamondon Family Entrance Award for Trades
- Ella May Metke and Henry Edward Metke Bursary Fund
- Morgan Family Award
- Len O'Neill Memorial Scholarship Fund
- Marietta Stanley Memorial Bursary

MacKay LLP Chartered Accountants established two new scholarships totalling \$5,000, one to be known as the John Bayer Memorial Scholarship. Recipients will be students taking accounting in the Business program at the Kelowna Campus. Don Turri, Partner of MacKay LLP and a Distinguished Alumnus (2008) of Okanagan College, announced the new award.



Don Turri

Annual Awards

- Carsten Construction Ltd. Home for Learning Fund
- Heartwood Homes Ltd. Home for Learning Entrance Bursary
- Ikon Office "You Make A Difference" Scholarship Fund
- Emily Mildred Markle Nursing Award
- Sandy Dore and Lee Claremont Grassroots Activism Award
- MacKay LLP Chartered Accountants Scholarship
- Okanagan Wine Festival Society Event Marketing Prize
- British Columbia Secondary School Mathematics (Okanagan Region) Contest Prize Fund

Donors can opt to set up their own scholarships, make one-time contributions or give an ongoing amount. The Foundation also accepts donations to help add new facilities and technology to the College to ensure the education students receive is cutting edge.

To find out about how you can help, please contact the Okanagan College Foundation at 1 (888) 650-6968 or visit the webpage www.okanagacollegefoundation.ca.

Sarah Carew joined by her daughter Jorja received the Judy McRorie Memorial Bursary, established to support a student in the Practical Nursing program.



Financial Report – April 1, 2009 to March 31, 2010

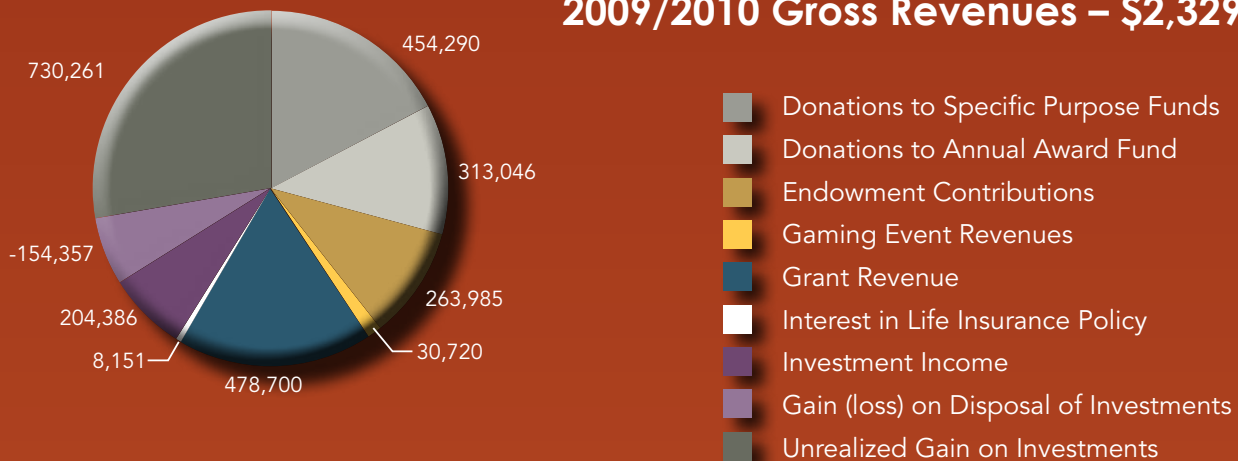
Support for the Okanagan College Foundation ensures that many of our students will receive essential funding for books, tuition and living expenses. Last year the Foundation's gross revenues exceeded \$2.3 million and awarded nearly \$1 million to over 1700 student recipients.

Donations are also helping add new facilities and technology to the campuses to ensure the education students receive is cutting edge. In Penticton, for example, Okanagan College is raising the bar in green building with its Centre of Excellence, being built to meet the Living Building Challenge and becoming the premier teaching site for sustainable building technologies and renewable energy conservation in Canada.

The Salmon Arm Trades Training Centre is undergoing a \$1 million expansion. The Foundation is raising money to equip the teaching facility.

Number of endowments held as of March 31, 2010	176
Number of annual award funds	204
Number of donations received	809
Value of Gifts-In-Kind received	\$148,566

2009/2010 Gross Revenues – \$2,329,182



2009/2010 Expenditures – \$1,693,242



Leadership

Okanagan College and Okanagan College Foundation appreciate the time, expertise, support and commitment provided by our volunteers and the Advancement Office staff.

Volunteer Leadership

Senator Ross Fitzpatrick, Honorary Patron
Mike Roberts, Honorary Campaign Chair
John Walker, Capital Campaign Chair
Rick Thorpe, Honorary Penticton Campaign Co-Chair
Yasmin Thorpe, Honorary Penticton Campaign Co-Chair

Directors

Dr. Steve Tuck, President, Central Okanagan
Jim Henderson, Vice-President, South Okanagan
Robert Eby, Secretary-Treasurer & Vice-President, Finance & Administration, Okanagan College
Charles Albas, South Okanagan
Dr. Beverley Busson, Shuswap-Revelstoke
Susan Connaghan, Central Okanagan
Jim Cookson, North Okanagan
Jim Hamilton, President, Okanagan College
Dr. Andrew Hay, Vice-President, Education, Okanagan College
Steve Jenkins, Central Okanagan
Paul Johnson, Central Okanagan
Lance Kayfish, Chair, Okanagan College Board of Governors
Frank Richter, Central Okanagan
Dr. Peter Schultz, Central Okanagan
George Solomonides, South Okanagan
Sigrid-Ann Thors, North Okanagan
Lynda Wilson, Shuswap-Revelstoke

Directors Retiring in 2009/2010

Alex Fong
Rick Roberts
Janet Shaw
Keith Williams

Directors Joining in 2010/2011

Denny Kaulback, Shuswap-Revelstoke
Lorraine McGrath, Central Okanagan
Vern Nielsen, Central Okanagan

Advancement Staff

Kathy Butler, Executive Director
Anne Kirkpatrick, Development Officer
Dawn Douglas, Administrative Assistant & Board Secretary
Katarina Hay, Alumni & Community Relations Coordinator (on leave)
Erin Kavanagh, Alumni & Community Relations Coordinator
Jackie Edwards, Donation Processing & Database Clerk
Marcy Nelson, Database Clerk
Suann Brown, Campaign Assistant

Credits

Jennifer Smith, Contributing Writer
Chris Stanford, Photographer

Mission

Okanagan College Foundation helps students gain access to education by developing scholarships and bursaries, and raising support for capital projects at Okanagan College. The Foundation receives and manages charitable gifts and builds relationships with communities to foster greater awareness of and support for Okanagan College.



Okanagan College Foundation

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