



WEST VANCOUVER
FOUNDATION



2019

FOUNDATION HIGHLIGHTS REPORT

While this is a 2019 Highlights Report, our world was turned upside down by COVID-19 mid-creation, therefore this now includes both a look back at the West Vancouver Foundation's (WVF) 40th year anniversary and a look forward to the rapidly changing world of philanthropy.

If there ever was a time to give locally, it is now.

If there ever was a time for us to change the way we give, it is now.

The charitable sector, particularly those at the front line, serving our most vulnerable citizens, needs us to re-look at our giving priorities and practices. At the WVF, we believe that many of these changes will serve us well in the next era of philanthropy.

According to a May 2020 McKinsey & Company report, we must adapt by:

- accelerating the pace and volume of giving;
- reducing the burden on grantees;
- partnering with donors to go further faster;
- investing in local communities; and
- supporting the public sector.

Visit our website westvanfoundation.ca to learn how you can partner with us in philanthropy.

REPORT FROM THE CHAIR



Nancy Farran

Board of Directors

Nancy Farran, Chair
Carolyn Coleclough, Vice Chair
Geoff Jopson, Past Chair
Dave Mason, Secretary
John Parker, Treasurer
Mark Ballard, Director
Naomi Denning, Director
Darrell Ert, Director (2020)
Gordon Holley, Director
Sara Mohamadkhani, Director
Paul Robillard, Director

Honourary Governors' Council

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Merla Beckerman
Mary-Ann Booth, Mayor
Moh Faris
Pamela Goldsmith-Jones
Gerry Humphries
Mark Sager
Audrey Sojonky
Jo-Ann Wood
Ron Wood

The West Vancouver Foundation acknowledges that the land on which we live and work is the unceded traditional territories of the Skwxwú7mesh (Squamish), Səlilwətaʔ/Selilwitulh (Tsleil-Waututh), and xwməθkwəy̓əm (Musqueam) Nations and we are grateful for the opportunity to do so.

FORTY YEARS. And what a difference. In 1979, I made the leap from Montreal to West Vancouver. It was a time when the streets were a bit quieter but the sea walk was already well used. When local shops were closed on Sundays AND Mondays. Forty years ago a few of the leading philanthropists and community builders of West Vancouver got together and established their own West Vancouver community foundation. They could see that as our community was growing and changing, there was an opportunity to harness the generosity within the community, for local good, forever.

Over those forty years, the world became more complex. Words entered our lexicon like “collaboration” and now, notably, “pivot”. Your community foundation has been doing a great job of both.

COLLABORATION. We have built deep ties with North Shore charities over the years and have shifted our focus from simply a cheque writer to one of collaborator and partner. I am proud to say that today we have strong relationships with many of the excellent organizations serving the North Shore – charities, non-profits, local government, business entrepreneurs and corporations. More recently we have provided leadership and organizational management training through the Sea to Sky community including Bowen, Squamish, Whistler and the Sunshine Coast. We are an active member of Community Foundations of Canada, an umbrella organization that serves to further the role of each of us with creativity and vision. We continue to work with many community partners as we research and produce our Vital Signs reports – from the police to health authorities to educators and those representing a variety of stakeholders. This has helped us to develop a growing understanding of the community’s strengths as well as the areas that need our attention.

PIVOT. This year our world and our work changed quite dramatically. We had already recognized how important it is to be nimble and in fact had already revamped our granting process to reflect that. But oh boy, have we had to move fast lately. I am so proud of the team of staff and the Directors of the Board as we established a North Shore COVID-19 fund and were invited to distribute Government of Canada funds to the charitable sector serving vulnerable populations in North and West Vancouver. As the dust settles we were able to raise over \$500,000 in just over 2 months which has translated into 46 grants. And we know the needs will continue to grow.

GRATITUDE. I am honoured to serve this community as Chair of the WVF Board. We have a talented group of volunteer Directors who each contribute time, talent and treasure. A special note to a long-standing board member, Mark Ballard, who retired after a full nine years on the board. Mark did two incredible game changing things for us over those years – he helped form the culture of fun and he taught us the value of marketing and story-telling. Indeed, to not tell our story would be an injustice to the community. Thank you Mark. We are grateful to live in a community that is safe, generous, beautiful and caring. We must never take any of that for granted. Your West Vancouver Foundation seeks to make sure we stay that way.

Yours,
Nancy Farran
Chair

GIVE WHERE YOU LIVE

A TIMELY MESSAGE

With a focus on philanthropy, grants, and leadership, our vision is a healthy and vibrant West Vancouver, where everyone is valued, contributes and feels they belong.

"Give Where You Live" is a common sentiment in community-based philanthropy, it harnesses the energy of established funders, occasional donors, corporate partners, and empowers us all to make a meaningful and positive impact on the residents of our community, now and for the future.

West Vancouver Foundation has chosen to adopt this message more boldly, starting with an 8-week local marketing campaign which kicked off on National Philanthropy Day, November 15th, 2019.

The Gateway entrance area to West Vancouver was adorned with Give Where You Live street banners, and the message was further supported through social media, advertising, a community wide post card to homes, along with a bridge wave by our Board members and staff on Giving Tuesday. Our Give Where You Live campaign is a three year initiative.

Our thanks to all of you who recognize the importance of making local support part of your giving plans.

GIVE WHERE YOU LIVE has never meant more than during the COVID-19 pandemic. At the onset of the pandemic the West Vancouver Foundation responded by establishing a special purpose emergency fund and rapid-deployment granting process. The street banners were remounted, along with community signage, social media and advertising. We are committed to working with groups that serve all aspects of our community, providing needed services for vulnerable populations, and to help rebuild during recovery.

The West Vancouver Foundation is a leader in community-based philanthropy with three main priorities.

- Encourage community giving where individuals, families and companies can make a positive and lasting impact.
- Highlight the pressing needs facing our community through insights and engagement.
- Provide grants to support community initiatives funded through the generosity of our donors.



How do you want your generosity to change our community?

We all have charitable causes we care about deeply: health & wellness, the environment, arts, recreation, taking care of our young people and seniors - to name just a few. The West Vancouver Foundation helps people give back to the community by connecting generous donors with causes they are passionate about.

Contact us to discuss your own giving plan.



Check out the complete report online or request a copy.

West Vancouver's Vital Signs 2019 – Launched October 2019 A welcoming, liveable community where everyone belongs.

Each Vital Signs report shines a light on those aspects of community that we can be proud of, and also identifies areas that need support. The 2019 report builds on the findings from the 2016 and 2017 reports, which also provided baselines for many of the indicators, along with our 2018 and 2019 public engagements and dialogues.

The work was further informed by the insights and expertise of our Vital Signs Advisory Council; Jenny Benedict, Chief Constable Len Goerke, Rev. Simon LeSieur, Dr. Mark Lysyshyn, Wendy McCulloch, Charlotte McLaughlin, Jan Riddell, Barb McMillan (lead researcher) and Elaine McHarg (WVF). Cover photo courtesy of John Tak.

2019

FUND SUMMARY

DISCRETIONARY

Discretionary funds provide for grants as determined through our Community Granting program each year. There are nine discretionary funds, the largest of which is the Howard Martin Fund.

Market Value: \$4,089,481

Adine Mees & David Van Seters Family Fund
Denning - Chunn Family Fund
Fred/k E. Russell Fund
Hender Family Fund
Howard Martin Memorial Fund
Irene Carpenter Fund
Mrs Kay Meek Fund
Thunderbird Marine Corp Fund
Caring Community Fund

DONOR ADVISED

Donor advised funds are usually established by individuals, families and groups who would like to be actively involved in granting decisions. These are a simple solution to a private family foundation.

Market Value: \$2,848,484

100 Women Who Care Endowment Fund
100 Women Who Care Spend Down Fund
Indigenous Youth Sport Legacy Fund
Bird Family Fund
Bonnie J McLaren Memorial Fund
Bradley T Bowles Scholarship Fund
British Pacific Properties Scholarship Fund 2031
Capilano Golf Club Fund
Capilano Golf Club Endowment Fund
Daphne Nicholson Charitable Foundation
Faris Family Scholarship Fund
Ian and Rosemary Mottershead Fund
Ian and Rosemary Mottershead Endowment Fund
Millerd Family Fund
Music Matters Fund
Musica Nautica Fund
Nancy Farran Compelling Opportunities Fund
Small B Family Fund

DONOR DESIGNATED

Donor designated funds are granted to specific, named charities.

Market Value: \$2,184,436

Black Creek Old Growth Environmental Fund
Capilano Rugby Club Building on Success Fund
Caring Community Art Fund
Caring Community Environment Fund
Caring Community Health, Wellness & Safety Fund
Caring Community Sport and Recreation Fund
Caring Community Youth Endowment Fund
Caring Community Youth Spend Down Fund
Danny Possee Memorial Fund
District of West Vancouver Arts & Culture Fund
District of West Vancouver Environment Fund
District of West Vancouver Parks Fund
District of West Vancouver Youth Fund
Donald & Marjorie Lanskill Fund
Ernie & Audrey Kershaw Memorial Fund
Gertrude and Christina Lawson Scholarship Fund
Holly & Beke Burne Fund
James A. Inkster Leadership Award Fund
Jeremy Dalton Rugby Fund
Jerry Beckerman Memorial Fund
Joshua Goos Memorial Fund
Linda Harrison Youth Fund
Mayors Endowment Fund
Michael & Marilyn Leckie Endowment Fund
North Shore Field Hockey Facilities Fund
Robertson Taylor Endowment Fund
Ron and Barbara Howard Memorial Fund
Tom & Judy Baillie Fund
Trajan James Martin Memorial Scholarship Fund
WV Artists Fund Endowment
WV Nature House Fund
WV Public Art Fund
WV Football Club Facilities Fund
WVFC Memorial Scholarship Fund

PLEDGE FUNDS

Pledge funds allow a donor to make contributions over a period of time to reach \$10,000 for a permanent fund.

Market Value: \$16,563

Howe Sound Biosphere Region Initiative
Kay Meek Arts Centre Development Fund
WV Art Museum Fund

Donors and agency partners have access to a host of charitable giving resources – including the Foundation's knowledgeable staff – for timely, personal advice and assistance about charitable giving and planning.

Market Values as of December 31, 2019. For full financial information and fund details please visit westvanfoundation.ca.

AGENCY FUNDS

Agency funds are managed on behalf of a registered charity that are seeking to benefit from professional support and create a stable source of permanent income. The Foundation accepts donations on behalf of these organizations.

Market Value: \$7,652,126

365 Give

Enhanced Learning Opportunities Fund (WVSD45)

First Aid Ski Patrol Fund

Gift of Music Fund (WVSD45)

Harvest Project Fund

Kurt Kirmse Memorial Fund (WVSD45)

North Shore Keep Well Society

North Shore Rescue Team Endowment Fund

North Shore Rescue Spend Down Fund

North Shore Rescue Tim Jones Legacy Fund

North Shore Stroke Recovery Centre

Paul Sugar Palliative Support Foundation

Robert K Iwata Fund (WVSD45)

Rotary Club Sunrise Fund

Sheila Tripp Memorial Fund (WVSD45)

St. Francis in the Wood Fund

WV Art Museum Permanent Fund

WV Marine Rescue Society Fund

WV Place for Sport Fund (WVSD45)

WV Police Department Fund

WV United Church Permanent Trust Funds

WV United Church Endowment Fund

WV Youth Band Fund

CAPACITY BUILDING

Capacity Building funds support the administration and growth of the Foundation.

Market Value: \$1,391,489

William Patrick Memorial Fund

WVCF Administration Fund

WVCF Capacity Building & Growth Fund

WVCF Capacity Building and Growth Unrestricted Capital

WVCF Grant Stabilization Fund

Customize your giving through the West Vancouver Foundation.

The West Vancouver Foundation offers a full range of fund options to meet the needs of individuals, families, groups, and other charitable organizations. The funds we manage support a broad range of programs, projects and initiatives across the arts, education, health, community service and the environment.

Helping you support the causes that that you are passionate about is what we do best. We can tailor a fund to the specific interests and needs of you, your family, organization, or company. Choose from options which reflect how involved you wish to be in grant decisions, and the timeframe of your gift.

13 new funds established in 2019

Donor Advised - 5 new funds

- Donors work with Foundation staff to find the type of programs or charities they and their families are interesting in supporting based on current needs in the community.

Donor Directed - 8 new funds

- Donors provide direction on the specific charities or areas of giving. Staff then match up grant requests.

New Funds

Ian and Rosemary Mottershead Endowment & Donor Advised Funds

Millerd Family Fund

Capilano Golf & Country Club Fund (Endowment & Club Fund)

Caring Community Art Fund
Caring Community Environment Fund
Caring Community Health, Wellness & Safety Fund
Caring Community Sport & Recreation Fund

District of West Vancouver Arts Fund
District of West Vancouver Environment Fund
District of West Vancouver Parks Fund
District of West Vancouver Youth Fund

Discover the power of your generosity.
Email; mylegacy@westvanfoundation.ca

DONOR STORIES

STORIES FROM 2 NEW FUND HOLDERS

Millerd Family Fund - Inspired by Community



Don Millerd was born and raised in West Vancouver, Mary has been here over 45 years, and together they have raised their family here, always fully participating in the community. The Millerds have been involved in the fishing industry for over 100 years. Don grew up in the Great Northern Cannery at Cypress Creek, had his own salmon cannery on the North Shore, and remains active in salmon processing. Don did all his schooling in West Vancouver, and Don and Mary's four daughters did all their schooling and activities in the West Vancouver community. Persuaded by the Foundation's

"Give Where You Live" campaign, the Millerds were compelled to give back to the community that has been so good to them and contacted the Foundation.

"It's been pretty simple (to give back). The community has been good to us."

The Millerds wanted to do something to help ensure future generations were able to enjoy this community too. They opened the **Millerd Family Fund** and have already donated to causes such as an at-risk youth employment training program.

Should you wish to set up a new fund, we can tailor it to the specific interests and needs of you, your family, organization, or company.

*To discover the power of your generosity email
mylegacy@westvanfoundation.ca.*

Remembering Henrik Moberg-Parker - Tribute Gift

Henrik Moberg-Parker passed away on February 5, 2020 at the age of 18. He was enrolled and living at UBC, studying Kinesiology. Henrik had a passion for doing activities with people - always with a smile. He was a leader on both his hockey and soccer teams. He loved his work as a sailing coach for children at Hollyburn and Kitsilano yacht clubs. From age 11, Henrik was one of the provinces' best sailors, and until 2019 competed nationally and internationally representing Canada. With his passing there was an outpouring of support from across the North Shore and Henrik's family

created the Henrik Moberg-Parker Excellence Fund - a scholarship fund to support excellence in youth sailing and honour the memory of this exceptional young man.

"We want to give kids who share his passion the encouragement to keep going with some financial support"

The fund's goal was to raise \$50,000 and already it has reached \$54,000, ensuring it will be able to help many young sailors for years to come.



THANK YOU

TO OUR MANY VOLUNTEERS + DONORS

Community Grants Committee

In 2019 we issued 37 Community Grants and in 2020 we received over 70 grant applications. The grants committee spent many hours adjudicating the grant applications, ensuring that the generosity of donors is directed to the causes that inspire them and to the issues that matter most in West Vancouver, as identified by the 2019 Vital Signs report. The 2020 committee members are; Sara Mohamadhani (Chair), Alex Chunn, Nancy Farran, Geoff Jopson, Dr. Janis McCaffrey, Liisa O'Hara, and Yang Wang.

Thank you to the many charities across the North Shore providing vital services!

Neighbourhood Small Grants

The Neighbourhood Small Grants (NSG) program is a grass-roots grant making program that helps build community and strengthen connections in West Vancouver. In 2019 there were 35 NSG projects ranging from emergency preparedness meetings to block parties, beach clean ups to a writers support circle. In 2020 the program was modified to the 'Responsive' NSG program, moving online and virtual, in response to COVID-19. The 2020 Resident Advisory Committee members are; Arzoo Babul, Hoon Choi, Eleanor Cramb, Lorna Duncan, Tamara Leger and ChiChi Wang.

Thank you to the 2019 project leaders!



North Shore COVID-19 Emergency Response Fund Donors

When the pandemic was declared in mid-March, we recognized that many vulnerable populations on the North Shore would be impacted and the charities providing services to those groups would be seeing a large increase in demand. In March the North Shore COVID-19 Emergency Response Fund was launched and in May the Emergency Community Support Fund, funded by the Government of Canada, began.

Over \$500,000 has been raised in donations from 120+ amazing community members, plus the Government of Canada. 46 grants have been issued to charities on the North Shore that are providing urgent services such as meal delivery programs to low income seniors, outreach programs for vulnerable youth, and crisis counselling services to those in need.

To donate to the North Shore COVID-19 Emergency Response Fund, go to:

westvanfoundation.ca/covid19



**WEST VANCOUVER
FOUNDATION**

2019 HIGHLIGHTS

2019 was a year of continued growth for the West Vancouver Foundation. We started off the year with a generous donation from Rosemary and Ian Mottershead. Established philanthropists supporting initiatives across Canada, the Mottersheads chose to transition their family foundation to endowment and donor-advised funds at the West Vancouver Foundation. Through the year we furthered our discussions with families, individuals and groups in the community to assist them in their giving programs. We expanded our community engagement to include youth & young adults, and issued our second comprehensive Vital Signs report examining the aspects of a liveable community. Building upon 2018, we further refined our process of community granting and also expanded the Neighbourhood Grants program allowing more groups to participate. Importantly, in this our 40th year, we also took time to celebrate the vital role of philanthropy in our community and the vision and hope that the Founding Board had for all of us in caring for each other.

For more highlights, or to view the West Vancouver Foundation 2019 audited financial statement, please visit westvanfoundation.ca. The Foundation provides careful stewardship of the funds given over to our care.

\$4.54
million
grants since 1979

\$18.2
million total assets
under administration

93
total funds
under administration

13
new funds
opened in 2019

7.4% 10 year
return
annualized investment
returns (post fee)

\$1.75
million in gifts
received this year

Thank you to our 2019 partners



**BRITISH PACIFIC
PROPERTIES**

*Founding Corporate Partner
& Vital Signs Partner*

LARCO

PARK ROYAL

*Vital Signs Intercultural
Engagement Partner*

 **Leith Wheeler**
INVESTMENT COUNSEL LTD.

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