

Mission Community Foundation

AGM REPORT 2023



Building Community Through Philanthropy



Mission Community Foundation

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History

Mr. G.W. (Bill) Harris, a long-time Mission resident and former Mayor, recognized the need for an organization where Mission residents could donate funds, to be held in perpetuity, for the benefit of this community and its citizens.

This organization became known as the Mission Community Foundation – a non-profit charitable organization for the benefit of the citizens of Mission.

Mr. Harris, together with others who had a similar vision, approached the then Dewdney Constituency M.L.A.s for their support. Austin Pelton and Norm Jacobsen sponsored Bill Pr404 and the Mission Foundation was born. Financial assistance during its early years was provided by the Mission Rotary and Kinsmen Clubs, McKnight Johnson and Partners and by the Founders: Norman Cook, G.W. Harris, Albert McMahon, Gordon Ruley, G.W. Walker, and John Weisgerber.

The first fund entrusted to the Mission Foundation came through the estate of the late Margaret Erskine in the amount of \$228,000 to support students pursuing post-secondary education. The Foundation has grown exponentially since then, thanks to the many incredibly generous donations made by community members.

The Mission Community Foundation is managed by a board of eleven. There are six elected volunteer members and five appointed members representing Mission City, Mission Public School District, Mission Regional Chamber of Commerce, Mission Community Services Society and Fraser Valley Regional District.

The Mission Community Foundation Board of Directors relies upon a professional team, including a Wealth Management Group, Bookkeeper, Auditor and Executive Director to provide advice, ensure legal requirements are met and to look after the day-to-day administration.



Our Mission

To bring together generous benefactors and the strength of our community to enable the disbursement of scholarships, bursaries, and grants for Mission citizens.



About Mission Community Foundation



Mission Community Foundation was founded on June 26, 1987, with monies donated through the estate of Margaret Erskine. Unlike other Foundations in BC and Canada, our Foundation was created by an Act of Parliament through a Private Members Bill. It serves the City of Mission and all areas included in School District #75's catchment.

It has representatives from the City of Mission, Mission Community Services Society, Mission Regional Chamber of Commerce, Fraser Valley Regional District, and School District #75, who sit on our Board of Directors with six (6) elected individuals. Together they manage the funds entrusted to the Foundation via Committee recommendations and a dedicated investment management team.

MESSAGE FROM THE BOARD CHAIR



Shelley Carter
Board Chair
Mission Community
Foundation

Mission Community Foundation is located on the Traditional, Ancestral, Unsurrendered, and Shared territories of Sto:lo People, Leq'amel, Sema:th, Mathxwi Sq'ewlets, and Quo:ltl'e'l First Nations, stewards of this land since time immemorial.

The year saw many changes. We had the Executive Director finish with her work at the Foundation mid-year. We were very fortunate to have our Vice Chair Bernadine Babuik step into the role. With her 30 plus years as an executive assistant within school districts, Mission for years, the Foundation was running smoothly. We can't thank her enough for her time and dedication.

We saw new additions to the Board of Directors and some that said farewell, as they are on to new life adventures. We were very saddened with the sudden death of Brent Rock who had sat as a Board member and committee member.

I want to thank the 2023 Board for all your support and keen sense of what the community's wants and needs are. Your passion for this community shines through.

Colleen Hannah, worked alongside Lucas McKinnon, Bernadine Babuik and myself, to sit for 3 full days of 95 student interviews. 1 every 10 minutes. We had such amazing applicants, and even the ones that did not

receive a scholarship this year, should be very proud of themselves and we look forward to hearing all the success stories moving forward into the future. We were very proud of all the students. We were able to give out 91 scholarships in the amount of \$104500.00.

We saw 32 Middle school students receive Cooke Awards for excellence in Math and Science. So very proud of the students that can become future scholarship applicants.

We also had a very heartfelt Grant Cycle 1. We gave out more than \$87,500 to well-deserved community groups that had applied for so many needs in the community.

Grant Cycle 2 was \$78,100.00. Different applicants, but still the need is there in this community.

We want to thank the RBC investment team, Lonny, Nik, Mark, and Elijah. We could not do this work without your guided expertise and compassionate support, to get us to the best place, which is supporting this awesome community and of course us. You have provided the best guidance and decision making with our finances. We are a healthier larger Foundation because of you. THANK YOU! We are in good hands.

We also thank our bookkeeper for the day to day, and the Audit team, for being very accessible to the Board of Directors. You help us in so many ways. So, appreciated.

MESSAGE FROM THE BOARD CHAIR

CONTINUED

Wow the community members that sit on our committees. You make this job so much fun. You are all so knowledgeable with community history and your true advocacy. We can lean on you to learn from and have great discussions with the easy to difficult decisions that comes at the committee level to make good recommendations to the Board of Directors.

Finally, THANK YOU, THANK YOU, THANK YOU, to the Benefactors. There are no words worthy enough to convey our sincere gratitude for allowing us to look after your funds to make money to benefit the residents and this city. There have been such momentous moments this year and past years, watching a student be blown away by the scholarship they received even if it was a smaller dollar amount. You truly could see on all students faces, the pride on the parents faces, that it makes it all worthwhile. We also must give a great big thank you to the school staff that help the students and the support staff that help the students fill out the applications for the scholarship process.

We also want to thank all the people that take the time to fill out the application for their community groups needs with the 2 Grant Cycles we provide to make real change in the City of Mission and surrounding areas. We are again so grateful to walk alongside all of you to see the major changes that happens in the lives of the recipients from all your generous help.

Please, have a look at the new website coming soon. We are very excited with the updates and changes we are making at the Foundation.

So, a big thank you, from a good mind and a good heart.



Shelley Carter

Board Chair

Mission Community Foundation

On behalf of the present Board of Directors

Lucas McKinnon - Vice Chair

Michael Roux - Secretary/Treasurer

Christine Armstrong - Member at Large

Linda Hamel – MPSD Rep

Carol Hamilton – City of Mission Councilor

Stephen Evans – MRCC

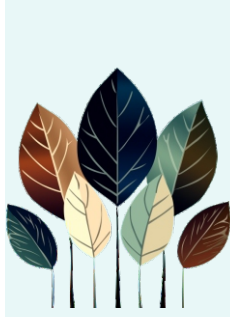
Julia Renkema – Board member

Executive Director – **Jamie Hayes** – Staff

2023 BOARD MEMBERS



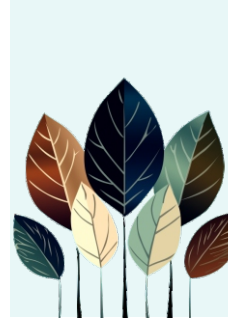
Shelley Carter
Board Chair
FVRD rep



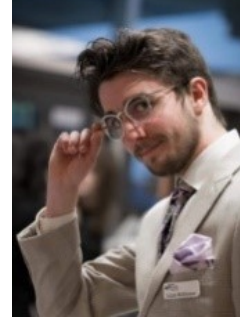
Bernadine Babuik
Vice Chair



Brent Rock
Secretary
(finished term 2023)



Gurdeep Toor
Treasurer



Lucas McKinnon
Member At Large



Carol Hamilton
City of Mission Rep



Colleen Hannah
MPSD Rep
(finished term 2023)



Stephen Evans
MRCC Rep



Obi Onyemaobi
MCSS Rep



Erin Osterberg
Board Member



Michael Roux
Board Member



Linda Hamel
MPSD Rep
(Fall 2023)



Christine Armstrong
Board Member



Angie Hetlinger
ED (Employment
end date June 2023)



Mission Community Foundation

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MCF COMMITTEES

Each of our Committees has at least one Board member who agrees to serve as chair and represent it at the Board meetings.

Bursary & Scholarship

Colleen Hannah – Chair

Shelley Carter, Lucas McKinnon, and Bernadine Babuik

(Colleen Hannah finished committee term Spring 2023) (Linda Hamel filled vacancy)

Development (Governance & Publications)

Bernadine Babuik - Chair

Sherry Cannon, Louise Lacerte, Eleanor MacDonald, Rosemary Nemanishen, Denyse Tavener, and Shelley Carter

Publications - Bernadine Babuik, Rosemary Nemanishen and Denyse Tavener

Governance - Bernadine Babuik, Rosemary Nemanishen and Shelley Carter

(Eleanor McDonald and Denise Tavener finished committee term Fall 2023)

(Linda Hamel and Christine Armstrong filled vacancies)

Distribution

Shelley Carter – Chair

Brian Antonson, Graham Black, Candie Thorne, Gloria Tyler, Brent Rock and Erin Osterberg

(Brent Rock finished committee term Spring 2023) (Michael Roux filled vacancy)

Investment

Bernadine Babuik – Chair

Shelley Carter, Gurdeep Toor, Don Calnek, Stephen Evans,

RBC Group – Lonny Andrews and Nik Venema

E.D. - A. Hetlinger attended all Committee meetings till June 2023 (Staff)

(Bernadine Babuik stepped in as transition support for the Board of Directors until new ED was hired)



HEPTONSTALL FAMILY FUNDS

In early 2020 Mission Community Foundation was advised that it was named the primary beneficiary of Jack Heptonstall estate. The estate consisted of 120 acres in a prime location in Hatzic Prairie and Jack left the Foundation his property with instructions to sell and create 6 funds from the proceeds. It was his desire to forever memorialize the family name in the community where he lived, with his sister Barbara, and loved all of his life.

Over the years the Heptonstall family was known for their community spirit. They were involved in the dairy board, diking board, schools, Rotary. The farm was also known as the place to go when there was a flood. They had the first tractor in the Valley and helped other farmers as time allowed.

During the 1948 flood many people moved their furniture and livestock to the Heptonstall barns as the land was above the flood levels. In 2021 when the Atmospheric River hit the Fraser Valley, the farm was called upon again to help the neighbours.

In 2023 the Mission Community Foundation received

\$3 million dollars

from the **Heptonstall** estate.

**Starting in 2023 the following
funds became available for use:**

Jack Heptonstall Bursary

is available for
students entering Scientific fields of study

Barbara Heptonstall Bursary

is available for
students entering Nursing

George Cox Heptonstall Bursary

is an adult bursary for
ages 19+ who live in Mission and want to go
back to school to improve their marketability

William & Edith Heptonstall Bursary

is an educational bursary
open to any field of study

Elsie Dale Bursary

is an educational bursary
open to any field of study

Heptonstall Family Fund

is a granting fund for
registered charities in Mission

The Mission Community Foundation would like to acknowledge this incredible gift and how it will support the City of Mission, FVRD, and surrounding areas. This bequeath will be a game changer for the Foundation as it is exponentially expanding the existing endowment, and therefore making the Foundation's ability to help students, registered charities, and nonprofits in Mission.

SCHOLARSHIP FUNDS

We are thrilled to have distributed \$104,500 in scholarships to Mission grade 12 graduates and mature students in 2023. This would not be possible without the generous support from our scholarship benefactors.

Adair Family Fund
Albert McMahon Memorial Fund
Annette Fitch Memorial Fund
Barbara Fehrmann Scholarship
Barbara Heptonstall Bursary
Bernice V Cordick Fund
Carlo J Billinger Fund
Carly Rae Jepsen Bursary Fund
Circle of Wisdom Society Fund
Clint Lobb Shake & Shingle Industry Fund
Cynthia Verhulst Memorial Scholarship
David Fryer Fund
Debbie Mattson Memorial Fund
Derrough Fund
Dirk Boswyk Memorial Fund
Elizabeth O Stevens Memorial Fund
Ellis Family Fund
Elsie Dale Bursary
Esther Claire Kathleen Clemo Scholarship Fund
Fenmo Boswyk Music Fund
Finch Memorial Fund
George Cox Heptonstall Bursary
Gerry Potter Memorial Fund
Hannah Dodd Memorial Scholarship Fund
Harris Family Fund
Heptonstall Family Funds
Hollister General Scholarship
Hollister TWU General
Hollister TWU Health Science
Hollister TWU Post-Secondary (2nd year)

Hollister UFV Science & Tec Entry Scholarship
Jack & Mary Brown Fund
Jack Cannon Memorial Fund
Jack Heptonstall Bursary
James Patty Special Education Fund
James Slusarchuk Memorial Fund
John & BJ Pearson Fund
LeDuc Bursaries
Lee & Park Family Fund
MacDonald – Robertson Fund
Marco Corbin Scholarship Fund
Margaret Erskine Bursary Fund
Marilyn McClinton Memorial Fund
Michael & Cynthia Butcher Fund
Mission Granite Club Fund
Mission Hillstompers Terry Cox Athletic Bursary
Mission Loggers Sports Association Fund
Chamber of Commerce Business Legacy Fund
Paula Chmilar Memorial Fund
Ralph Babuik Fund
Robin & Fran Sorrell Fund
Robson Fund
Rock Family Pharmacy Fund
Ross Allan Memorial Fund
Rotary Sustaining Scholars Fund (2nd year)
Skillicorn-Melanchuk Bursary Fund
Vic & Hilda Hollister Fund
Vivian Crist Memorial Scholarship
Wayne Douglas MacLean Memorial Scholarship
William & Edith Heptonstall Bursary
Yum Science Fund



GW COOKE AWARDS

George Willoughby Cooke was a long-time friend of Bill and Shirley Walker. During his lengthy friendship with Bill and Shirley Walker, Mr. Cooke extended many kindnesses to them. As an honour to his name and in remembrance of his friendship and generosity, Mr. and Mrs. Walker established this fund to share with others the type of kindness George Willoughby Cooke shared with them.

The George Willoughby Cooke Fund was established in 1992 by Bill and Shirley Walker of Mission and is administered by Mission Community Foundation. Its purpose is to recognize students in Grades 7, 8 and 9 for achievement in Math and Science. Recognition medallions and certificates are provided to the recipients at our annual scholarship event.

Although this fund is intended to honour individual achievement, friendship and kindness are also significant factors when choosing award recipients.

George W. Cooke



32 Mission Students received GW Cooke Awards in 2023



GRANTING FUNDS

The Mission Community Foundation holds 2 Grant Cycles each year. In 2023, we were able to award **\$165,600** in grants to the Mission Community. These grants would not be possible without the generosity of our many benefactors.

Albert McMahon Mission City Rotary Club Fund

Animal Welfare Fund

Beaton Patience Drug & Alcohol

Abuse Prevention Program Fund

Bill & Linda Clark Sports Fund

Caring Fund

Cliff & Marjorie Rock Family Fund

Community Fund

Crimestoppers Perpetual Fund

Derrough Fund

Donald & Doreen Lanoville Fund

Fenmo Boswyk Music Fund

Friends of the Library

G.W. (Bill) Harris Fund

George Willoughby Cooke Awards

Glen Kask Theatrical Legacy Fund

Heptonstall Family Fund

James Patty Special Education Fund

Johnson Bequest Fund

Marilyn Boswyk Memorial Fund

McPherson Family Community Fund

Mission 2014 BC Winter Games Legacy

Mission District Historical Society Archives Fund

Mission Hospice Society Endowment Fund

Mission Lifetime Learning Association Fund

Muir (James) Family Fund

Muir Hospice Fund

Negrin Community Fund

Norma Kenney Fund

Public Art Endowment Fund

Reel on the River Fund

Rock Family Food Fund

Rotary Legacy Fund

Rotary Literacy Endowment Fund

Ted Brown Animal Welfare Fund

Youth Centre Fund (MY House)



RECOVERY FUND 2023

Thanks to Community Foundations of Canada and the Federal Government, we were able to offer \$216,000 in grants to the Mission Community. The fund supports Community Service Organizations, including non-profit organizations, Indigenous Governing Bodies and Registered Charities located in Canada. The Community Services Recovery Fund was built to respond to what charities and non-profits need right now and support them as they adapt to the long-term impacts of the pandemic.

The following Mission organizations received grants from this fund:

Hope Central
Mission Association for Community Living
Mission City Farmers Market

Mission Friendship Centre
Mission Seniors Association
SARA for Women





Thank you.

September 13, 2024

It is a privilege and pleasure to work with the Mission Community Foundation to help guide prudent investment decision making. Our multi-decade process at Siemens and Matties Consulting Group of RBC Dominion Securities is rooted in downside risk management, careful growth and compliance with robust governance practices to ensure accountability.

We welcome dialogue to illustrate why you, as donors, can feel confident that your important, community-building gifts are being stewarded by proven practices to grow carefully and consistently while standing the test of time. Thank you for investing with us in the good work being done every day by your Community Foundation here in Mission.

With long term growth, short term capital preservation and sustainable, perpetual distributions in mind, we are pleased to report year-to-date net returns greater than 9.00% from a balanced, globally diversified, multi-manager, multi-style allocation of equities, fixed income and cash.



We achieve our goals by surrounding ourselves with the people who can help make it happen.
Thank you, Mission Community Foundation and donors, for your trust in our process.

Mark Siemens *Elijah Matties* *[Signature]* *Marian Lewis* *[Signature]* *[Signature]*



I am Jacquie Johnston and my current position with Mission Community Foundation is a contracted bookkeeper.

What do I bring to the table?

The following is a short rendering to assist with the answer to that question.

I am the Principal and Owner of From Red to Black Progress Expert Inc. and have facilitated quite a few different industries/organizations in my over 40 years of this career as a professional bookkeeper.

I am also the Vice President of the Canadian Bookkeepers Association. Our main focus is to ensure our members have resources to assist them in accomplishing their goals as a professional bookkeeper.

We (From Red to Black Progress Experts Inc.) have been in business since July 2008, and as principal of From Red to Black Progress Experts Inc, I want to ensure our clients have the solid financial foundation that is required to assist the business/organization with moving forward.

We feel that professional bookkeepers are the architects and facilitators of that financial foundation. If the financial foundation of any business or organization is not solid, then they are inviting failure.

We also provide advisory services, restoration of bookkeeping, and provide support and mentorship, coaching and training for graduates of bookkeeping educational courses and Start up Small Business'/not for profits.

Throughout my career, as a Professional Bookkeeper, there have been many educational courses through Community Colleges, Webinars, Workshops at various conferences and stand alone. These have all been absolutely transformative, however, the best teacher is still experience, in my humble opinion.

Some of my prior experiences that assisted my education also are:

Province of British Columbia where my tasks were to process and track expenses and payroll for a specific Ministry. Keeping in mind the budget and spending and payment authorities. This work experience lasted for over 25 years. I was educated and trained by professionals in the gov't finance department and Ministry as well as outside courses.

Dr. Peter Aids Foundation where I was the finance department. My tasks were to restore the employee retirement account as well as payroll for the regular staff and the nursing staff and the regular day to day bookkeeping and government filings. This work experience was a couple of years.

Current Clients other than Mission Community Foundation:

Children's Organ Transplant Society

Luckachoo (toys)

Nick and Kym Spencer – Farrier and Farm

The Move Man Moving Services

Young Entrepreneurs – educational not for profit

The following organizations were supported by Mission Community Foundation in 2023.

Grant Recipients 2023



Mission Hospice Society
when time matters most



Recovery Fund 2023



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**Mission Community
Foundation**

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