



**surreycares**  
COMMUNITY FOUNDATION

**Annual Report**  
**December 31, 2016**





Our Vision:  
A giving connected community

Our Mission:  
We inspire donors  
We grow endowments  
We invest in people



## What we do

- We work at understanding the needs of our community so that we can best invest in the people in Surrey.
- We help donors direct their wealth and charitable giving, investing those donations wisely and annually granting to Surrey charities - making a difference forever.
- We manage endowment funds so that charitable and philanthropic work can sustainably continue to serve our community.

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## 2016 Board of Directors

### **Jeff Hector, Chair**

Senior Wealth Advisor, Assante Financial Management Ltd.,  
Assante Vancouver Centre and  
Family Enterprise Advisor, Legacy Family Office

### **John Lawson, Vice Chair**

Senior Wealth Advisor, Assante Capital Management Ltd.

### **Bilal Kathrada, Treasurer**

Partner, Clearline Chartered Accountants

### **David Boulton, Past Chair**

Wealth Management Advisor,  
Retired

### **Mike Bose, Grants Chair**

Agricultural Entrepreneur, Bose Farm, Surrey

### **Linda Stromberg, Communications Chair**

SheTalks

### **Kevin Scott, Director**

Barrister, Kane, Shannon & Weiler

### **Peter Unruh, Director**

Barrister, Kane, Shannon & Weiler

### **Jeff Borkowski, Director**

Panorama Legal LLP

## Finance Committee

Lee Francis  
Bilal Kathrada  
Vern Sandhu

## From the Chair

SurreyCares has had a fantastic year of growth through 2016.

With our strategic focus on capacity building, we were pleased to see progress both financially, and in community relationships.

The year saw us reconnect with many “Friends of SurreyCares” in an informative and informal reception.

Moving forward, our strategic focus continues to be on building capacity in order to serve. Our ultimate goal is to increase the amount of money granted out to the community. We realize that this will be achieved with appropriate human and financial resources.

I am very pleased, therefore, to have welcomed three



*Jeff Hector  
Chairman of the Board*

members to the Board of Directors in 2016, who bring diverse skills and proven Board experience. Office capacity has also grown, as the Executive Director notes in her report.

## From the Treasurer

The year ending 2016 showed an increase in the funds that we manage for our endowment fund holders to roughly \$6,087,000 in capital (\$195,000 in the income fund). This increase came about both by donations and by adding a portion of their interest earned back into the capital fund. Fund holders also were able to grant out from their endowments funds.

The fair market value of the investments held is roughly \$6,869,000 with roughly a \$700,000 unrealized capital gain.



*Bilal Kathrada, Treasurer*

Our fees for managing funds remain at an affordable 1%, and with tight budget management we are able to maintain service.

# Investing in Community



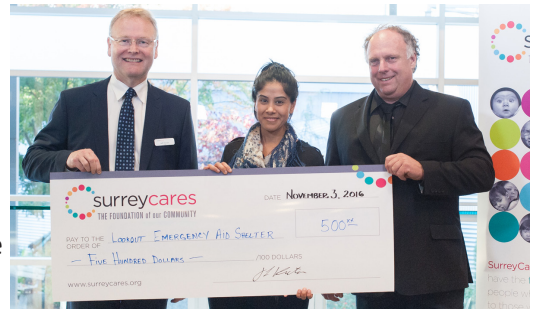
Mike Bose  
Grants Chair

## Grant Presentation Ceremony

SurreyCares Community Foundation is more than a charity for charities. We are a champion for the community, and actively highlight the amazing work that is done every day through the charitable sector.

Our grant-giving is just a part of that process, as we are able to fund excellent work. But also important is the opportunity that we provide our grant recipients to showcase what they do, and to take the spotlight. Our annual grant awards ceremony is in the Fall, a well-attended event that celebrates the work being done in our community.

We are very pleased to grant out up to \$5,000 per organization, in order to change lives.



## Spotlight on a Grant Recipient

### Zajac Ranch Society



In the summer months, Zajac Ranch for Children provides camps for children and young adults with chronic, life-threatening and/or debilitating conditions. These experiences give participants the opportunity to explore the outdoors while developing greater social and environmental awareness, increased self-confidence and positive growth in attitudes towards physical activity.

Zajac Ranch welcomes children and young adults with a variety of medical conditions and disabilities to our summer medical camps from June to August.

**A**ll year long, Hayley is accompanied almost everywhere because her seizures are not well controlled. When she is at camp, she feels independent and stronger, able to try new things and stretch herself.

*Hayley was really scared of climbing the rock wall and it took her a long time, but she made it halfway up and was proud of herself. Camp is really the highlight of her summer and it has made her more confident*

*and boosted her self-esteem. We can't thank you, your sponsors, partners and donors enough.*  
- Jacqueline, mother of Hayley, Down Syndrome, Epilepsy, and Muscular Dystrophy camper



## Where does this grant money come from?

SurreyCares manages a permanent collection of endowed funds, the earnings of which are used for the long-term benefit of our community, in perpetuity.

## How endowment funds work for your organization

*Grants to community.*

A fund is established by a philanthropist, or a fundraising campaign (for example) for the general good of the community. The interest from the fund is granted out according to the wishes of the benefactor/s. This may be directed to area of greatest need, youth, education, health, or another charitable purpose meaningful to the donor.

*A funding tool for your organization.*

A charitable organization starts a self-directed endowment fund, with all earned interest going towards their greatest need. This can be a great fundraising tool, attracting donors who prefer to fund sustainability.

## Create a legacy fund

Whether you want to address an urgent need in the community, support the memory of a loved one, or help out a charity with a project, we have a giving option to help you make an impact and improve the lives of others.

## Fundraising online

In 2016, SurreyCares partnered with 2MEvents to allow easy donations directly to each fund. In addition, fund holders can easily create a crowd funding campaign, with all funds going directly to their account. Goals can be set for the campaign and progress followed. Tax receipts are automatically issued.

## Grant Streams

**Vital Signs:** Grant applications should address gaps identified in the most recently published Surrey Vital Signs report. (Oct 2016: Newcomers)

**Community:** Programs that address general community needs.

**Youth:** Programs that address the needs of youth in Surrey.

**Special Needs:** This includes health and personal needs projects.

*SurreyCares has granted out over \$1,000,000 to our community!*

**Our Grants Committee** is comprised of a team of skilled volunteers who score each application individually, based on the merits of the application, and on how the project fits our annual criteria.



## Grants Awarded 2016

### AGENCY

Association of  
Neighbourhood  
Houses of BC

### PROJECT *(edited)*

*Youth Collective: Peer Leadership Training Program*

The Youth Collective is a diverse group of youth, aged 14 to 21, responsible for the planning of programs for the Youth Space in South Surrey. The Youth Space provides a safe, sober, and inclusive space for all teens to escape their troubles, develop leadership skills, give back, and alleviate boredom.

BC Centre for  
Elder Advocacy  
and Support

*Informing and Connecting Seniors in Surrey to Services & Benefits*

Workshops on benefits and services for Surrey older adults in collaboration with the DIVERSEcity Community Resources Society and other senior-serving agencies in Surrey.

The Canadian  
Cancer Society,  
BC & Yukon

*Camp Goodtimes*

An internationally acclaimed, summer recreation program for children with cancer, young survivors and their families, Camp Goodtimes provides a fun-filled, empowering experience for all participants. Participants build lasting friendships over meals, singing, water sports, campfires, dances and other fun activities.

Cerebral Palsy  
Association of  
British Columbia

*Dance Without Limits for Children with Disabilities*

A successful adapted dance program for children with disabilities in the Surrey area.

Community First  
Foundation

*Backpack Buddies Surrey*

Many students, who rely heavily on breakfast and lunch programs during the school week, go home to meager or no meals on the weekends. Backpack Buddies bridges this weekend hunger gap.

Guildford Park  
Community  
Group Society

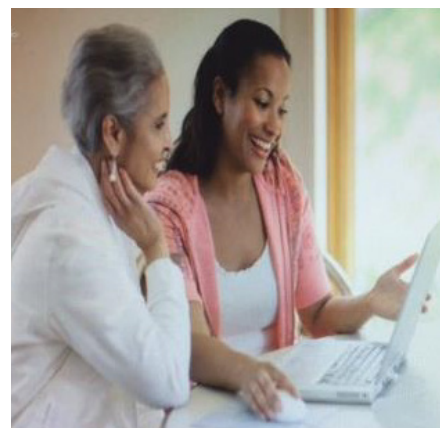
*After School Tutoring and Homework Program*

The Tutoring Program is an after school educational enrichment program for at-risk youth who live in our inner-city community in Surrey.

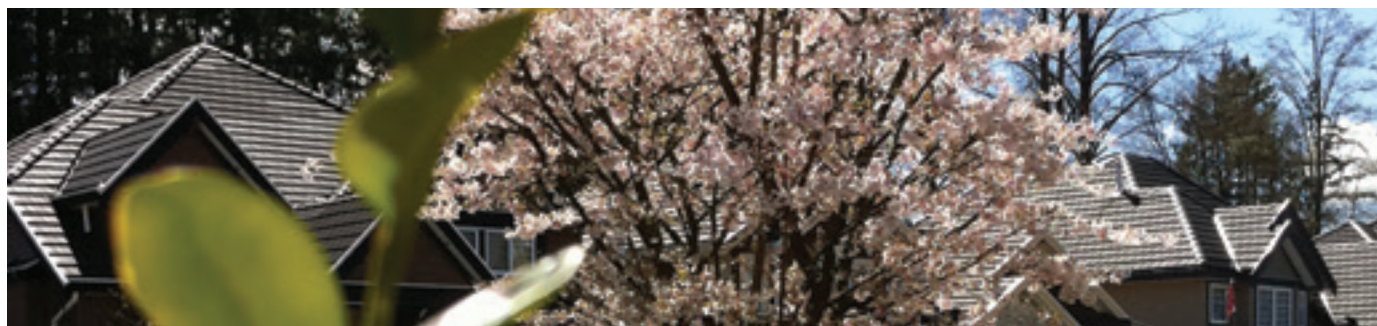
Junior Achieve-  
ment of British  
Columbia

*Delivery of Youth Business Education Programs in Surrey*

The challenges that our youth and economy is facing are the issues that JA addresses - workforce readiness, entrepreneurship and financial literacy. With over 800 dedicated volunteers, JA helps to transform the lives of our youth, as they learn life skills, and financial and business knowledge through JA programs.



*"Both of my girls have found a second home at Camp Goodtimes. For the one with the cancer diagnosis, it has meant meeting other kids who have had similar experiences to her. She has found a 'sameness' in others, which has helped her approach life with new confidence, and has allowed her to accept her differences with gratitude and pride. For my other child, camp has been just as important. She has been able to try new things in a safe and loving environment. She has also been able to come to terms with her own medical challenges (not cancer-related) because she knows that she is not judged by other kids or staff while at camp – something she doesn't always experience in the 'real world.' I really can't express how important Camp Goodtimes is to our family."*  
– Cheryl, parent of Camp Goodtimes participants





*What a great opportunity LMDSS has provided our family member's to learn beyond school. Kristina is in the Reading and Math program 2 days a week at the LMDSS office. I signed her up not knowing how this would impact her life (and mine too). She is being challenged to use her words when speaking. Those who know Kristina if she had a hard time saying a word she would be frustrated, give up trying, walk away and not speak her words. But now she is totally engaged in learning. She is also identifying numbers and is co-operating with the teacher who is very patient with her teaching skills. Thank you for making this program available.*

*"This my first year at Zajac Ranch. Thank you for helping with my camp fee. I had so much fun! I loved every part of camp – I was able to ride a black horse, I completed the low and high ropes course, archery was awesome, the pool was warm, and one night, we slept in the tee-pee. I even sang my favourite song at the talent show. I had so much fun at camp with my new friends I didn't have time to miss my family. Thank you, thank you, thank you!"*  
- Hillary, CNIB camper

*...The results of a pro-bono study by the Boston Consulting Group in 2010 determined that JA in Canada creates an annual return to society of \$45 for every dollar spent and that Junior Achievers are 50% more likely to start their own business. Both of these outcomes will positively impact the Surrey community...*

## AGENCY

Lookout  
Emergency Aid  
Society

Lower Mainland  
Down Syndrome  
Society

Pacific Post-Par-  
tum Support  
Society

Semiahmoo  
House Society

Special  
Olympics of BC

Tetra Society of  
North America

Zajac Ranch  
Society

## PROJECT *(edited)*

### *Hepatitis Day*

"World Hepatitis Day" raises awareness of hepatitis through educating at risk populations and raises awareness in the community.

### *Reading and Math Workshop*

The Reading & Math program provides one on one private sessions or classes up to 5 individuals to improve their reading and math skills.

### *Surrey Community Moms & Baby Talks*

Pacific Post Partum Support Society's Community Mom & Baby Talks for mothers in Surrey, improving early identification and treatment of PPD/A and performing timely critical interventions.

### *Bring Summer Camp to Youth with Special Needs through individualized Support*

Services, including recreations and leisure services, which offer a wide range of recreational and educational programs adapted to the unique needs and abilities of youths and adult with disabilities.

### *Uniforms and Equipment*

Our Local has 19 different sports offered to our very special individuals that need extra guidance in the sport or sports they have chosen.

### *Surrey Custom Assistive Devices*

Tetra volunteers create custom assistive devices to enhance the lives of adults and children with significant physical disabilities. Tetra creates volunteer-built assistive devices specifically for citizens of Surrey with disabilities.

### *Zajac Camper Allowance*

Zajac Ranch makes it possible for children living with chronic and many times life-threatening illnesses and disabilities from across BC to attend summer camp.



## Managed Endowment Funds

In most cases, donations to SurreyCares Community Foundation are endowed. That means they are permanently invested for long-term growth, with a portion of the growth granted out, and a small portion added to the fund for increase, thus making a difference forever. These are SurreyCares fund holders.

AGENCY	DESCRIPTION
70 Times 7 Fund	Supporting organizations and programs within the community aimed at assisting those suffering from mental illness, and in particular, those that provide addiction counselling, treatment and support services.
Arts Council of Surrey Endowment	Supporting the performing, visual and literary arts in Surrey.
Coast Capital Savings Youth Fund	Coast Capital Savings focuses on funding youth related projects.
Darts Hill Garden Park Fund	Darts Hill Garden is a legacy to the City of Surrey, with upkeep funded through this endowment.
Doug Hooser Heritage Fund	Benefiting local charitable organizations involved in Heritage with an emphasis on, but not exclusively related to weaving and associated educational purposes.
Health Fund	Supporting the City of Surrey's medical facilities.
Manjit Panghali Memorial Fund	This fund awards a scholarship to a student graduating from Panorama High School.
Jordan Powell Legacy Fund	We provide scholarships for Holy Cross Secondary School graduates pursuing music education.
Surrey Education Fund	BC Retired Teachers Association: A scholarship fund.

## From our files: the beginnings of the Arts Council of Surrey Fund



Mrs. Kathleen McIntosh  
Surrey, BC

Dear Mrs. McIntosh,  
Re: Arts Council of Surrey Fund

I am pleased to inform you the establishment of the Arts Council of Surrey Fund is now complete and your recent donation of \$10,000 will be doubled through the BC Arts Renaissance Fund Grant Program, sponsored by the BC Government.

In addition, we have received further contributions of \$3,650 and \$1,350 which have been included in the matched funds application which will bring the total of this fund to \$30,000. As the 2008 Cultural Capital of Canada, we are excited to partner with the Arts Council to promote the development of arts programs in our City.

Your contribution has planted a seed which the Foundation will nurture and grow!

*excerpt edited for length*



AGENCY	DESCRIPTION
Smart and Caring - Surrey Community Fund	Give to the area of greatest need in our community, to support general initiatives and projects of charitable organizations.
SRS Vocational Services Society	The SRS Fund continues to provide grants to charities which offer employment programs for adults who are disadvantaged. Granting is annually.
Surrey German School Endowment Fund	Supporting the activities of the Surrey German School.
Surrey Libraries	Inspiring people to build a better future through the power of knowledge. Surrey Libraries open doors to lifelong learning, information and ideas.
Surrey Art Gallery Association	Raises funds for Surrey Art Gallery's exhibitions, publications, programs, and projects.
Surrey Metro Savings Endowment Fund	Supporting the general initiatives of charitable organizations.
Surrey Minor Softball Endowment Fund	Supporting the initiatives of minor softball in Surrey.
Friends of the Surrey Museum Fund	Admission to your museum has been generously sponsored by the Friends of the Surrey Museum & Archives Society through Endowment Fund income.
Surrey Youth Endowment Fund	Supporting local youth programs and services.

## From our files: the Manjit Penghali Memorial Fund established



est 2007

Surrey's North Ridge Elementary school announced today the establishment of the "Manjit Panghali Memorial Fund" with the Surrey Foundation to provide an annual scholarship to a graduating student who attended North Ridge.

The scholarship fund was created in memory of Manjit Panghali, a Surrey School District teacher whose life tragically ended in October 2006. The memorial fund was initiated by Carolyn Convey, a colleague who taught a Grade 1 class with Manjit at North Ridge Elementary.

"Manjit's family has been overwhelmed by the love and support we have received from the students, staff, and parents of North Ridge Elementary," says Manjit's sister and family spokesperson Jasmin Bhambra. "Thanks to Carolyn Convey and the Surrey Foundation\*, Manjit's memory will always be honored and her love of teaching and children will continue to live on through this scholarship fund."

*\*SurreyCares Community Foundation*

### Investment Management

Investments are professionally managed in accordance with the investment policy of the Foundation by CIBC WoodGundy.

## At a Glance: Funds Managed 2016

Fundholders endowment capital (fundholders actual deposits)	\$6,087,215
Fair Market Value of endowments (reflecting investment earnings)	\$6,868,977
Funds granted out	\$193,708

# Vital Signs 2016

## Understanding the needs of our community

The 2016 Newcomers Vital Signs Project was published in October 2016, asking newcomers-to-Surrey about their experiences as a newcomer.

### Who is a newcomer?

Using five years as a benchmark (since 2011), for this year's survey, we included anyone moving to Surrey—from elsewhere in BC, Canada, or the world. For us, a newcomer was someone, whether alone or as part of a family, who chose to make Surrey home, for whatever reason, and stayed.



*Shirley Wilson*  
*Vital Signs Project Manager*

We know Surrey is a desirable location for newcomers and poised for growth. We also know that everyone needs to work together to address the concerns and issues raised by the newcomers we surveyed. While doing so, we need to continue to embrace and celebrate our great community.

Our vision is to lead a stronger, more meaningful, inclusive community connection into the future, and to build a resilient and resourceful community.

As in the past, we encourage you to gain insights and inspiration from the stories in these pages and then look beyond them.

With this report, we strive to provide information to philanthropists, grant-makers, leaders, program directors, and policy-makers in Surrey



that helps them select, craft, and fund intelligent policy and program plans that meet the current and future needs of

newcomers. Additionally, we use what we learn from this research project to guide our own annual grant-making programs.

## Vital Signs Newcomers 2016 Advisors

Felix Kongyuy, CEO,  
Baobab Inclusive  
Empowerment Society  
Tahzeem Kassam, COO,  
DIVERSEcity Community  
Resources Society  
Jennifer Mervyn, PhD,  
Doctors of BC  
Anita Huberman, CEO,  
Surrey Board of Trade

Connie Hong, Senior  
Settlement Program  
Manager, Options  
Community Services  
Society  
Devinder Chattha,  
Director, Language  
Studies, Settlement &  
Social programs

Progressive Intercultural  
Community Services  
(PICS) Society  
Dr. Charan Gill, CEO  
Tamam Hasan, Arabic  
Settlement Counselor  
Katarina Low, Program  
Assistant / Resource  
Advisor

Eva Touzard, Community  
Connections  
Coordinator BC  
Marnie Perrin, Artistic  
Director, Surrey  
International Children's  
Festival  
Surinder Bhogal, Chief  
Librarian, Surrey  
Libraries



# Wil and Cherry

Cherry and Wil moved to South Surrey from Richmond in 2012. Both were attracted by the green spaces and the slower pace of life. Wil is a professional in the high-tech industry. He has a longer commute to work, but says the move was worth it because he likes where he now lives.

## Saving for a Home of Their Own

Cherry says people are friendlier and more inclined to talk. Finding a rental home for their young family was difficult, as many places are for the over-55 age group. They are saving for a home but are concerned about affordability. "Though we like it here, we may end up moving to find a house," she says. Both say neighbours and the community have been welcoming. Cherry, a stay-at-home mom with two young children, says grandparents babysit when they are able to visit Canada.

Otherwise, due to cost, daycare is not an option.

Cherry wants to take courses, but transit, daycare, and waitlists for programs are all obstacles. "Safety is an issue. . . . In Surrey, there are areas you don't want to visit in the evening."

## Safety Matters to This Young Family

The family uses the local recreation centre and looks forward to using facilities more as their children get older. They feel there is more crime in Surrey than there was in Richmond. After their building was broken into, Wil joined Block Watch, the neighbourhood crime prevention program. They take the children to parks and playgrounds in the daytime. In the evenings, they don't find Surrey is as safe. Despite that, overall, the couple says their move was positive and they enjoy their life in Surrey.

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## Vital Signs Researchers

We are grateful to Surrey universities, and our close partnerships that have provided supervised graduate students to conduct research.

Simon Fraser University has been a strong partner from the inception of Surrey's Vital Signs, and we are thrilled to continue this partnership.

In late 2016, Kwantlen Polytechnic (KPU) and SurreyCares strengthened our partnership as we formed the community Advisory and began the pre-work for the 2017 First Peoples Vital Signs.

Thank you!

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## Three key questions from Vital Signs newcomers

- How can we foster a greater sense of belonging among newcomers?
- How can we ensure newcomers find suitable and satisfying employment?
- How can we assure affordable and appropriate housing and child care for newcomers?

### *Surrey Vital Signs topics:*

2015: Youth Vital Signs

2016: Newcomers Vital Signs

2018: First Peoples Vital Signs

launch event in February





## From the Executive Director

*Karen Young*

2016 was a year of growth and change.

With many thanks to an anonymous donor, we were able to pursue our strategic goals to build capacity, a necessary step towards increasing grants to the community. We increased staff hours and welcomed new team members in both paid and voluntary capacity. We were sorry to bid farewell to longtime staff member Karen Roberts, an office mainstay for 10 years, and grateful that she stays connected!

A few highlights of the year:

- Vital Signs Newcomers report published
- Granted out almost \$194,000, and celebrated
- Forged wonderful new partnerships in the community
- Webpage updated, with a crowd funding feature added for fund holders

Thank you to everyone who is with us on this journey as together we change people's lives in our *giving connected community*.

## Giving through the Foundation

Donating to your favourite causes through SurreyCares takes the guesswork out of your charitable giving. You may make a gift to the Foundation to be added to an existing open fund of your choice, or donate to the area of greatest need. You may establish a new fund for the charitable purposes specified by you. To start a new fund, a minimum donation of \$10,000 is required, received as a lump sum or in installments over a period of time. The fund can be tailored to your specific interests and wishes.

*Please discuss your proposed gift with a lawyer and/or a tax advisor to understand all aspects of your donation. It is not our intention to provide legal or tax advice.*

## Partners

A huge thank you to our donors, to our partners and sponsors whose generous support allows us to serve our community.

A special recognition to the following gold-star partners.



**SurreyCares Community Foundation**

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