



COMMUNITY COMES FIRST

ECF

30

The first
30 years
of Edmonton
Community
Foundation



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Contents page photo: ECF signed on to be the title sponsor of Sphinxes, an improv troupe showcasing Rapid Fire Theatre's cast of female, trans and non-binary performers.

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► The Belcourt Brosseau Métis Awards was established in 2001, making an investment in education that would help ensure the long-term success of Métis students in Alberta, including Taneiya Mahe and Ramsey Mudryk.



PROLOGUE

◀ *Sisters Liuting, Liuyoon, Liushien, Eleanor and Jacqui Goon, and Siauping Goon Yeung, say the Goonchen Family Fund was inspired by the two people who had instilled a philanthropic spirit in the family for decades—their parents.*

THIS HISTORY of the first thirty years of formal operations of the Edmonton Community Foundation (ECF) is told as one narrative, but in reality it represents thousands of stories. This book commemorates an overarching story of community success, though only in the same way a photo album captures a small part of what might comprise a family's entire history. ECF is an organization, but it is also the accumulation of the stories of every donor, every grantee, every employee, every volunteer—practically every Edmontonian from the last three decades of astonishing life and growth and excitement and challenge this city has faced during these three decades. We are all story-telling beings; it's how we communicate who we are, what we value, what we aspire to. Both metaphorically and in

reality, ECF is a receptor and channeller of stories. Edmontonians have shown time and again how important their community is to them, and ECF has grown alongside them to help realize their desire to have as meaningful a contribution as possible. Today, in 2019, ECF is a vital and dynamic organization with thousands upon thousands of ordinary citizens contributing to its success in so many ways—from setting up family funds, to volunteering, to making donations, to creating programs ECF can support. We will always bear in mind as we tell our story that although we can't tell every one of those stories, each one of them matters as much as the next. Each story we tell symbolizes the value of every contribution, because every contribution, large or small, whether in time or in money, idea or energy, is integral to the success of ECF, today and as we move into the future.

Community foundations like ECF go back to roughly 1914, at least in North America, when Frederick Goff formed the Cleveland Foundation. It was Goff who devised the essential pillars of what a community foundation should do—that gifts for use in the community were to have a common pattern; that distributions of income ought to be handled by a governing body representative of the public interest; that community organizations should involve a permanent endowment for common benefit; that a foundation should serve all types of programs; and that community organizations should publish a publicly accessible annual report. These remain the basic principles to which all those who contributed over the decades to the founding and continued success of ECF have adhered. As we shall see, later, the Cleveland Foundation is still considered the model on which many others fashion themselves.

ECF is now so woven into Edmonton's fabric it is hard to believe it has only been operating for 30 years. But ECF is also proof of one thing above all else: that Edmonton is a city like no other, with a special character that lends itself to community building, philanthropy, volunteerism and a quiet pride in making the world a better place. In order to best understand how ECF makes its mark today, we must look back to understand what it grew out of.

When Tevie Miller was working as a lawyer in Edmonton in the late 1960s, it must have been clear to him and his peers that Edmonton was a city on the edge of dynamic change. To understand the vision

they had for the future of our city, it is important to appreciate the character of Edmonton as it was then. ECF has always been a reflection of its hometown—back when Harry Strom was premier and ECF was just a notion, and today, in 2019, in its 30th year of formal operations, as it approaches endowment holdings of nearly \$600 million.

The late 1960s and early 1970s were times of vast change in Edmonton and Alberta, times of political upheaval and provincial redefinition. Ernest Manning, after seven consecutive terms as Premier, had handed the reins to Strom in 1968, and it was clear to everyone the political landscape was shifting. The Socreds were a predominantly rural party, whereas the Peter Lougheed Progressive Conservatives were urban. Lougheed was young, articulate, forward-thinking, progressive, and probably more moderate as a Progressive Conservative than many liberals are today. It was in the 1967 election that Lougheed's party took six seats and the Socreds earned under 50% of the popular vote. This combination laid down a marker for Manning, which was that Alberta was about to change from a rural to an urban province, from a place of farmers and ranchers to a place of ideas and technology, from a place that preserved the ways of the past to one that hungered for the promise of the future. After that 1967 victory, Manning, always savvy, retired. Strom was then soundly thumped in August of 1971 by Lougheed, who went from 26% of the popular vote to nearly 50%, and from six seats to 47. Though the final numbers weren't known until the night of the election, there had been no denying in the months leading up to the election that change was afoot.

It was a period of dramatic shifts across the board. In 1971, Edmonton's population, including the outer ring communities, was roughly 500,000 people. Today, it is close to 1.4 million. Oil had been flowing out of the Athabasca sands for a few years, but it was still a turbulent time, given the 1973 oil crisis and the tension between Alberta and the Trudeau government. It was, in short, a period when the city of Edmonton was trying to figure out what it was and what it was going to be.

In the two and a half years between Manning's retirement in 1968 and Lougheed's victory in 1971, Alberta went through a social upheaval that only comes along once every generation or two, so it was hardly

surprising that a group of savvy citizens were feeling that. Modern times were bearing down fast. Looking back, it makes sense that citizens were starting to imagine new ways of doing things. It was during this period of energy and uncertainty that people gathered to talk about new and exciting ideas like community foundations.

CHAPTER

1



Frederick Goff is credited with founding the community foundation model after he formed the Cleveland Foundation in 1914.



1970–1988

THE FIRST ATTEMPT

Tevie Miller was the catalyst behind the idea of forming ECF. Though his attempts to form the Foundation in the 1970s were ultimately unsuccessful, his vision and tenacity helped pave the way for future efforts to succeed.

IN THE LATE 1960S, over informal lunches and coffees, there were discussions about starting a community foundation. ECF archives contain a few letters between the “Members of the Interim Committee to Establish a Community Foundation” printed on United Community Fund (UCF) [now United Way] letterhead, which identified the energetic community participant Tevie Miller as the UCF Honorary Solicitor. Other prominent names mentioned in the correspondence included local lawyer Louis A. Desrochers and Ross Munro, the publisher of the *Edmonton Journal*.

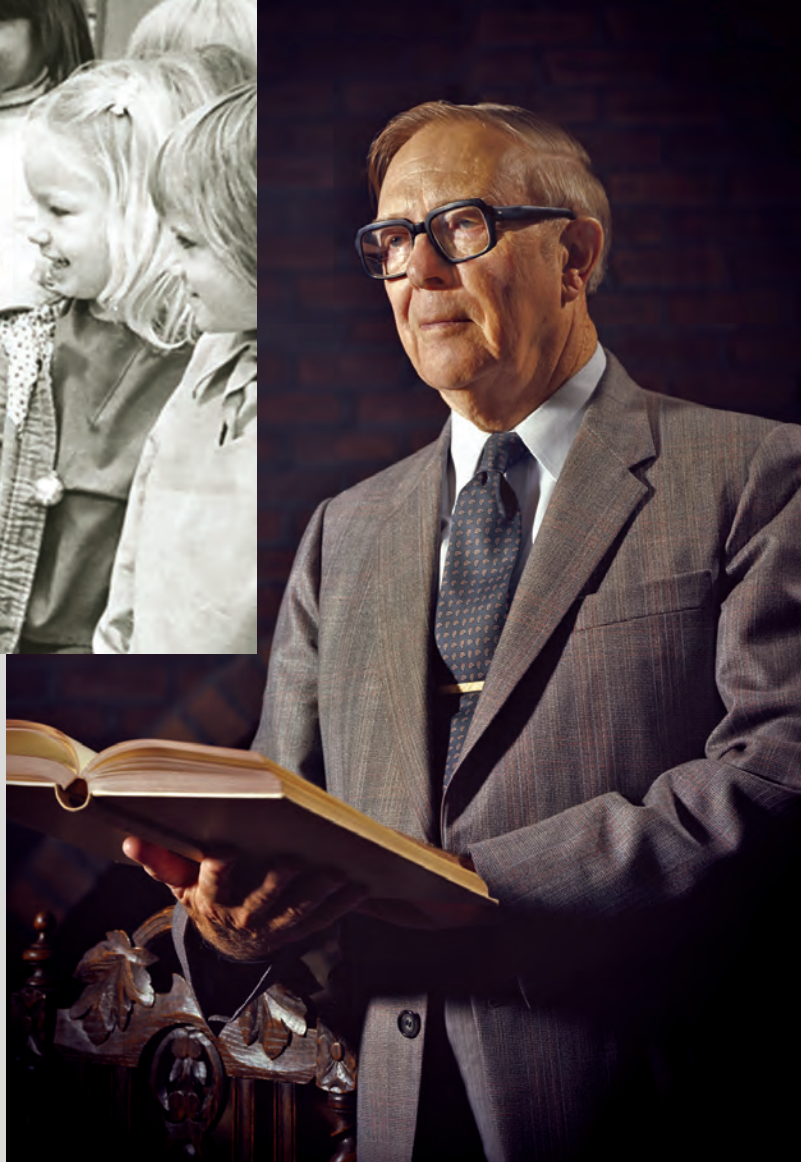
The correspondence makes it clear that original push came out of the offices of the UCF. This is only fitting, given that decades later ECF and the United Way would go on to become strong collaborators on so many important initiatives. Many years later, John Slatter, the man who would one day do so much to reanimate ECF, interviewed Tevie Miller. He reported that Miller told him that the formation of ECF was really intended “as an instrument of United Way of which he was Vice



Dr. G. Richard A. Rice, founder of Sunwapta Broadcasting Ltd., was one of a number of formal petitioners who presented a Private Members' Bill to establish ECF to the provincial legislature in 1971.



Mayor Ivor Dent and Senator Ernest Manning were also members of the group of formal petitioners who presented a Private Members' Bill to establish ECF to the provincial legislature in 1971.



President at the time. In 1970, two bequests (from the Monaghan estate and the Loeb estate) were made to them...of which United Way was to use the income. They decided United Way was not equipped to administer that sort of money and that they should form a Foundation and hand the bequests over for management, hoping that there might be further bequests and that they could raise further funds.”

That spring, the Interim Committee decided to explore how to go about setting up a foundation. Their first step was to contact the provincial government. Tevie Miller, demonstrating his great vision as well as his dedication to the idea, wrote to the Provincial Secretary in the summer of 1970, saying,

A number of concerned citizens in the City of Edmonton have had a couple of meetings recently to discuss the possibility of forming an organization called the Edmonton Foundation. This would be patterned along the lines of similar foundations in the cities of Winnipeg and Vancouver and would be designed to provide a vehicle whereby citizens of the City of Edmonton could leave specified or unspecified bequests or gifts to the Fund for proper management and distribution. These Foundations have performed a very useful service in other centres, and it is now thought that Edmonton has reached the size where a similar organization would provide a very useful service for the city of Edmonton and its citizens. After canvassing the situation very thoroughly and looking at the setups in Vancouver and Winnipeg, it is thought that the best procedure would be to seek a Private Bill at the next sitting of the Legislature. Both Vancouver and Winnipeg operate on this basis. A small committee of the group involved would like to meet with you at your convenience to discuss this concept and the Private Bill and I would appreciate if you could fix a time when you would be available to receive our delegation.

The government responded favourably a couple weeks later.

There was clearly a great deal of work done throughout the fall of 1970 to prepare the Private Bill for presentation early in 1971, and much of it fell to Tevie Miller. He named people such as Mayor Ivor Dent, E.A. James, Senator Ernest Manning, Joe Forest, Michael English, G.R.A. Rice, Ross Munro, Hugh Harvey, and himself as formal



Tevie Miller spearheaded the effort to present a Private Members' Bill to establish ECF to the provincial legislature in 1971.

petitioners for the Bill. The petition, dated January 20, 1971, read, "That the object of the Foundation is to accept, hold, use and administer property and funds for charitable, recreational, educational, athletic, cultural, historical and other purposes which may be for the benefit and advantage of members of The Edmonton Community. Wherefore your Petitioners humbly pray that Your Honourable Assembly may be pleased to pass an Act for incorporating such a Foundation."

The ECF archives are full of Miller's correspondence back and forth with any number of interested and connected parties. Reading all the correspondence around the founding of a community foundation in Edmonton, what impresses one most is that despite the enormous amount of work involved, he was able to perform his real job so ably as to be named a judge in 1974. Miller was a dynamic individual. Born in Edmonton on first day of 1928, he attended law school at the University of Alberta, where he acted as the U of A's student union president; he went on to become president of the Alumni Association and ultimately Chancellor from 1986-1990. Besides trying to get ECF off the ground, he also chaired the boards of the Edmonton Jewish Community Council, the United Way and the Edmonton Symphony, and was heavily involved in organizing the 1978 Commonwealth Games and the 1983 Universiade Games.

Knowing that they had to get a draft Bill ready roughly by the end of January, Miller's group arranged a meeting for January 15 at the Edmonton Club. The Committee's first attempt at drafting a Bill included the Objects of the proposed Foundation. The committee had done their research. The first-ever stated objectives of the Foundation were:

- A. To use the funds entrusted to it for such purposes as will in the sole discretion of the Board most effectively provide care for needy men, women and children, and in particular the sick, aged, destitute and helpless.
- B. To promote educational advancement in scientific or medical research for the increase of human knowledge and the alleviation of human suffering.
- C. To better underprivileged or delinquent persons.
- D. To provide such other purposes as may in the discretion of the Board appear to contribute to the mental, moral, cultural, and physical improvements of the inhabitants of the Edmonton district.

Nearly fifty years later, the driving impulse of ECF still contains the outlines of that fundamental code. Certain values endure.

There were hiccups along the way. In mid-January, the City of Edmonton administration heard about this new idea and tried to convince the still-unformed ECF that the City's newly proposed cultural funding body join forces with this new group. In the end, this "merger" didn't happen, primarily because the Foundation didn't want to be associated solely with cultural causes. Ironically, a few months later, immediately prior to the amended Bill going before the Legislature, the city's four main cultural bodies—the Symphony, Art Gallery, Opera and the Citadel—met with Tevie Miller and strongly objected to the possibility that a new foundation might receive government grants to fund cultural organizations. They were so adamant that this was not the function of a foundation that they threatened to hold up the Bill in the Legislature if clause D was not altered. Miller explained in a letter to Joe Shocter that it was "not the intention of the Originating Group involved with the Community Foundation to become arbiters as to the distribution of funds amongst the performing arts." Of course, the new group had every intention of supporting cultural activities, but because it did not want to get involved in seeking or distributing operating grants from government funding bodies such as the Alberta Foundation for the Arts or the Canada Council, they agreed and the clause was removed.

In early January 1971, as the time was nearing to put the Bill forward, the group sought to register the name. The committee's first choice, "The Edmonton Foundation," was not available. But their second choice was "Edmonton Community Foundation," and it was available. The Sacred MLA, Dr. Lou Heard, agreed to sponsor the Bill in the Legislature, and the Clerk of the Legislative Assembly let the committee know in February that the Assembly had received the "Petition for a Private Bill respecting The Edmonton Community Foundation." Sadly, Dr. Heard was never able to see ECF come to fruition, as he passed away in 1988.

After clearing various other small hurdles, such as having to redraft the Bill to pass legal scrutiny, the Bill was resubmitted on March 10, 1971. It received two readings through late May and April, and received its third and final reading on April 22, 1971, at which point it became

1971

CHAPTER 117

THE EDMONTON COMMUNITY FOUNDATION ACT

(Assented to April 27, 1971)

Preamble

WHEREAS certain citizens of the City of Edmonton have by their Petition prayed for the passing of an Act incorporating The Edmonton Community Foundation, and that the said Foundation be empowered to receive and administer donations in trust for the purposes hereinafter described;

AND WHEREAS it is expedient to grant the prayer of the said Petition;

THEREFORE, Her Majesty, by and with the advice and consent of the Legislative Assembly of Alberta, enacts as follows:

Short title

1. This Act may be cited as The Edmonton Community Foundation Act.

Inter-pretation

2. In this Act,

(a) "Board" means the Board of Directors of the Foundation as constituted pursuant to this Act;

(b) "Edmonton Community" means the City of Edmonton and such other areas in Northern Alberta as the Board may from time to time by resolution include for the purposes of this Act;

(c) "Foundation" means The Edmonton Community Foundation incorporated by this Act.

(d) "Governors" means those persons provided with a power of appointment under section 7(1);

(e) "Policy By-law" means a by-law enacted by the Board, under section 11(3) or (4), designated by the Board as such, establishing a basic policy regarding administrative procedures of the Foundation and, subject to the provisions of this Act, the distribution of the income of the Foundation and the manner in which the funds of the Foundation are to be invested;

(f) "Sponsor" means an individual, organization or trust that before September 1, 1990, on terms accepted by the Board, donates or commits to donate within a period of not more than 5 years, a sum not less than \$1 000 000 to the Foundation.

official. It was done—the Edmonton Community Foundation existed. However, if the “Interim Committee” thought the hard part was over, they were soon cured of that notion.

► The first challenge the Interim Committee faced was to assemble a board. It was hard to find dedicated volunteers who were esteemed in the community and who also had the spare time to do the work needed to set up a foundation. While prominent figures like Ivor Dent and Ernest Manning supported the idea, they simply couldn’t commit to building a new foundation.

Late in May 1971, Hugh Harvey sent a letter to Tevie Miller explaining that it was probably a good time to officially transfer the proceeds from the Monaghan Estate to the ECF. This represented the first funds ever assigned to ECF. Through the spring and summer of that year, the interim committee tried without much success to gather and name an official Board. As autumn rolled around, John Janzen at the City of Edmonton asked whether the new ECF would take over the City’s cultural granting activities. Tevie Miller wrote back to Janzen saying that, in relation to cultural granting activities, “it is the opinion of the organizing group behind the Foundation that it neither has the authority to distribute operating funds nor would it wish to get involved in this area at the present time.”

By November, Miller was still trying to establish a Board. Miller wrote in his personal notes that Manning’s secretary called to say that the Senator might be available over the Christmas holidays, but couldn’t promise. This pattern repeated itself for months with other requests as well, until Miller simply chose a date—April 10, 1972—and told everyone to attend. And as if he wasn’t already doing enough, he was working to secure charitable status with the Department of National Revenue. It was this correspondence, incidentally, that ultimately led to the exclusion of athletic activity promotion, as the Department insisted prior to the granting of charitable status that it wouldn’t support those activities. On July 6, 1973, ECF received its charitable registration number.

When April 10 came around, those in attendance talked about their progress to date and about gaining charitable status, but there must not have been that many in attendance, because the process of naming

officers was tabled until a future meeting. Little progress was made over summer and in November 1972, Miller wrote the group to tell them the UCF had transferred the Monaghan funds, which meant the ECF actually had money in the bank. He suggested the group get together again and “make some plans to launch the Foundation and to notify the Community of its existence.” He called for a meeting on December 12. At that meeting, Miller was appointed as President, Ethel Wilson as Vice President, J.H. Forest as Secretary and E.A. James as Treasurer, all in lieu of an actual Board.

Sadly, that represented almost the peak of their activity. The next few years saw a series of stalls, delays and frustrations, with the always politely persistent and inspiringly tenacious Miller struggling time after time to generate momentum and participation. In the fall of 1973 he wrote to the group that “it has become impossible to arrange an evening meeting with the interim Directors of the Edmonton Community Foundation as we never seem to be able to get sufficient people to attend,” adding that he thought it was “imperative” they get together soon. By early 1974, with charitable status and a bit of money in the bank, almost three years had passed since the actual passage of the Act. By now, the Lougheed years were in full swing. The economy was strong and evolving. It was an exciting time, and Miller kept trying. They hired an advertising company, Vickers and Benson, to create a brochure. They suggested two mottos to go along with a logo: “Nothing can be created out of nothing” (Lucretius) and “Our deeds determine us, as much as we determine our deeds” (George Eliot). Both seem apropos even for today’s ECF.

Miller wrote to the organizing group again in September 1974, noting how difficult it had been to get them all together to make decisions and he asked for them to make “a special effort to attend” the next meeting. There are no notes from that meeting and we don’t even know if the group met.

Starting a foundation takes money and manpower, neither of which the ever-optimistic and energetic Tevie Miller had at his disposal. What he did have, on top of now being on the verge of becoming a judge, was an extra workload without anyone to do the work. By the mid-70s, Revenue Canada was threatening to revoke ECF’s status unless it provided Returns of Information for previous years. Miller

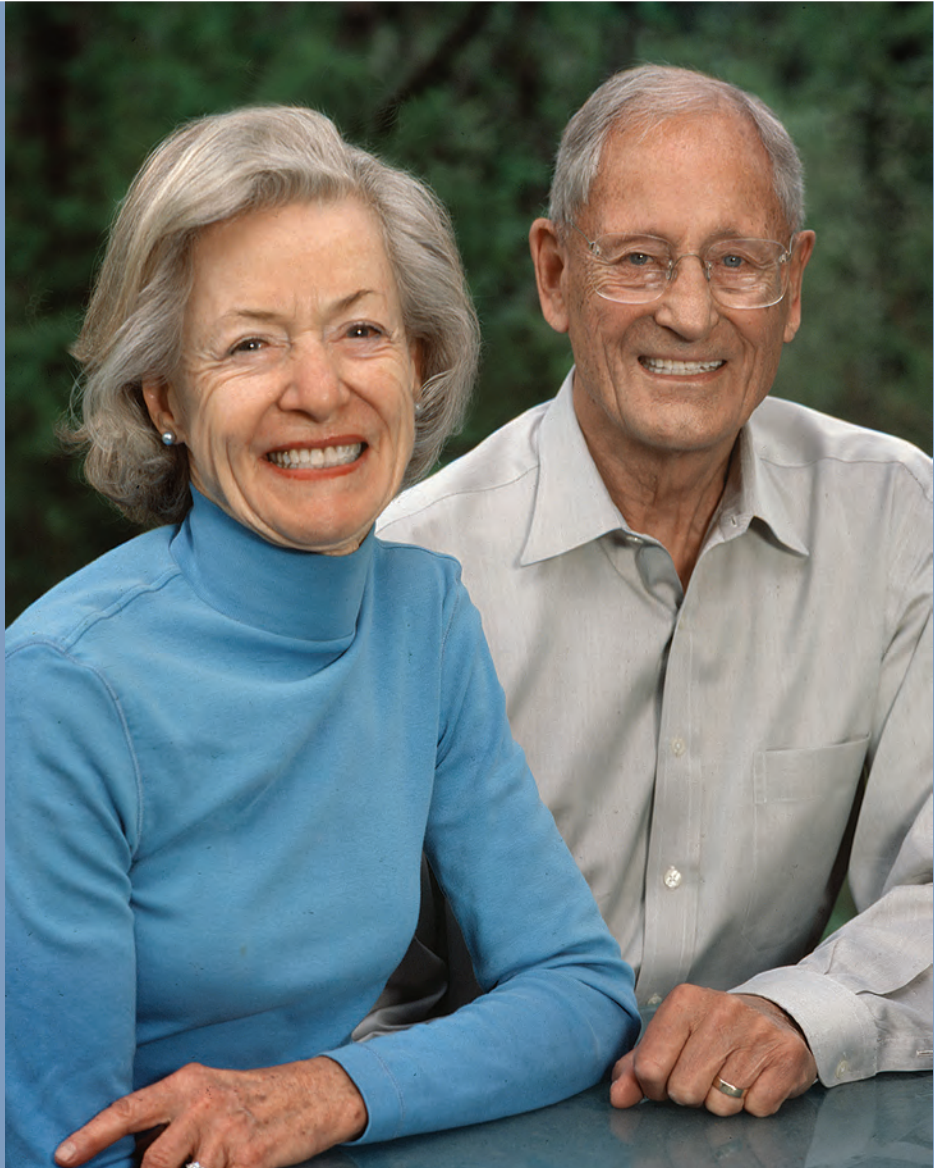
got them the information and the threat was removed. Very little of note happened in 1976, perhaps because it was right around this time that Miller was named to the Alberta bench and was now Justice Miller. By 1978, it had become clear it was not the right time for ECF to bloom.

In 1978, Miller wrote to Ross Munro, the former publisher of the *Edmonton Journal* and a member of the original committee, but who had retired to Ontario. “There is little point, at this time,” wrote Miller, “in trying to explore the reasons for our inability to get the Foundation organized.... Speaking for myself I regret that we have been unable to make the Foundation a viable operation for I am still of the opinion that it has a place in our community, but, in my present position, I am unable to carry the matter forward and no one else has expressed any interest in devoting the large amount of time that would be needed to make it work.” When he spoke with John Slatter nearly two decades later, Miller told Slatter it had all come to naught because “there was no one driving the bus.” Miller did, however, offer a hopeful prediction for the future. “The Act will still remain on the statute books of the Province,” he wrote, “in case some other interested group ever wants to come along and attempt to revive the Foundation.”

And so, in 1978, the first attempt to create an Edmonton Community Foundation came to a formal end when the group asked the Department of National Revenue to withdraw their charitable status. A full board was never created. No AGMs were held. No funds were accepted from the community. No grants were disbursed. Despite the early energy, the goodwill, and the collaboration, it all came to nothing. The decade came to a close and the concept effectively disappeared.

It would take another decade for someone else to find it and coax the magic out of the bottle.

CHAPTER 2



1988–1989

REINVIGORATION

John and Barbara Poole, along with two other Edmonton families, reinvigorated Edmonton Community Foundation in 1989 with a combined donation of \$15 million.

LOOKING AT THE STORY of how ECF was reactivated in 1989 introduces us to many inspiring and committed citizens whose individual stories could warrant chapters or even books of their own. ECF, and Edmonton, owe these people a debt that cannot be repaid for devoting their energy and gifts to improving the lives of those around us without asking for anything in return. That's what makes ECF strong—the collective spirit of the enterprise.

Having said that, as you dig deeper into ECF's history, you inevitably come across the names of a handful of individuals who dominate the early years. Among them, in the late 1980s and early 1990s, was John Poole.

Of course, we also know from having them grace our community for decades, that John Poole rarely did anything of significance in the philanthropic community without first consulting his wife Barbara. Together, they paved the way for others who, through their ingenuity,

enthusiasm and integrity, turned Edmonton from a small regional city of the post-World War II era into the thriving centre it is today.

Many in Edmonton knew John and Barbara and are aware of how committed they were to our city and its people, but even those who knew them may not be fully aware of just how deeply they influenced the city during their six-decade-long relationship with Edmonton. They were integral to ECF's creation and success, and to engendering the respect it has earned in the community today.

As far back as the early 1970s, John and Barbara Poole supported the dynamic maturation of Edmonton as a city. They loved Edmonton and saw how they could be a part of its growth. For the Pooles, it was both literal and figurative city-building. It's fascinating to imagine John Poole, who was co-chairing Poole Construction with his brother George, building an office tower downtown at the same time he and Barbara might have been talking with friends about how providing support to the symphony could help "build" the city in other ways. They saw what was going on around them—the incredible charge of a city finding itself—and were delighted to immerse themselves in it. They believed (and never wavered from this belief) that Edmonton gave them their lives and families and livelihoods, and so they should give back to their community.

Of course, one of the many ways in which they participated in the maturation of their city was through their philanthropy. Peter Poole has fond childhood memories of visiting the Salvation Army's Citadel building with his parents to help set up chairs for the evening's theatre performances. This was just one small way the Pooles contributed to their community. In the bigger picture, John and Barbara believed that establishing what they considered peak arts organizations—ballet, opera, symphony, etc.—were key in attracting and retaining strong talent to the city. John Poole developed his philanthropic skills in much the same way he developed his business skills—through mentors and experience. In 1962, the Calgary businessman Eric Harvie was supporting the Glenbow Museum, and he also engaged in the occasional bit of art and artifact trading with John's father, Ernie Poole, the man who founded Poole Construction. Ernie and Eric knew one another as collectors, as art lovers, as businessmen, and as friends. John Poole met Eric through his father,



Ernie Poole (left) and Eric Harvie (below), helped introduce John Poole to the endowment model as a way to give back to his community in perpetuity.





▲ *In 1989 Robert Stollery became the Foundation's first Board Chair.*

▶ *George Poole and his wife Rae believed that Edmonton needed a community-based focal point for giving and in 1989 they helped reinvigorate ECF with a gift of \$5 million.*

and Eric shared with John many of his ideas and insights about foundations and endowments. John chose to make a \$25,000 donation to Eric's foundation, which was not an insignificant sum for the time. He chose to donate it as an endowment. We're not quite sure why he did that, but it certainly leads us to wonder whether perhaps John Poole, even as far back as the 1960s, was aware of and believed in the notion of endowed giving. His \$25,000 seed gift has grown into one of the largest endowments of any museum or gallery in Canada. John understood the mathematics of geometric growth and the stability that endowments provide to organizations that must weather unpredictable budget cycles.

Perhaps even more importantly, Eric Harvie had under his employ a man named John Slatter. John Poole and John Slatter became friends and colleagues, and their friendship proved to be of great significance to ECF.

In 1977, John and his brother George Poole decided to sell Poole Construction to a group of 25 employees, who changed the company's name to PCL. It was one of the few major sales of a company to its employees in North America, a sale that deliberately sought no competitive bids (and with very few caveats, though one was that the company's headquarters remain in Edmonton; again, evidence of John Poole's commitment to Edmonton). John and George Poole, along with Bob Stollery (one of the 25 employees involved in buying the company) and the rest of the company's senior management, arrived at the decision that a sale of this nature would be the best way to honour three core "Poole's Rules," the set of rules that Ernie Poole had always worked by: "Employ the highest-grade people attainable;" "Give encouragement and show appreciation;" and "Be fair in all dealings." Bob Stollery took over as chairman, president and CEO, which pleased John greatly. He once said, "the smartest thing we ever did as a company was hire Bob Stollery." This was yet another working friendship that would ultimately prove extremely valuable to ECF.

John Poole continued to advise PCL from time to time, but, being barely over 60 and in no way ready to retire, he made giving back to the community his new job. He operated an office in downtown Edmonton. There was no number on the door, no name plate. He did all his own research. He employed no gatekeepers. He threw himself

Shirley and Robert Stollery, one of three Edmonton families to reinvigorate ECF with a combined gift of \$15 million in 1989.



into his philanthropy full time. But there is one detail that reveals something important about how John Poole went about his giving: The pencil. He would do his own research about what causes to support and then he'd have meetings with friends, family and advisors, and at those meetings he always had a pencil at hand. He put great stock in the views of people he trusted and knew one of them might make a good case that would sway him. He needed his pencil to make changes on the spot. This was John sending a message: No matter what our surface circumstances, you and I are equal so let's make the world a better place together.

John and Barbara contributed to so many aspects of our community that it would be difficult to say they prioritized a single one, but certainly their deep love of the arts was apparent from the start. Barbara's love of theatre and dance was tied to her love of music. As a practicing photographer, John had a keen photographic eye, which drew him to visual art. They attended concerts, befriended many artists,

and supported many, if not all, of the city's smaller theatre troupes. Significantly, they didn't just give money but also showed up to sell tickets and unfold chairs. It was this kind of immersion into the arts world—not just the monetary support of it—that earned John and Barbara various accolades. In 2004, they were joint recipients of the Alberta Order of Excellence, a high honour, but even more unusual in that they were among the first to receive this award for arts and culture, as opposed to the more-often recognized worlds of business and politics.

Throughout the 1980s John and Barbara, along with George and Rae Poole, as well as Bob and Shirley Stollery (who were also establishing themselves as significant philanthropists), were engaged in what we might call personalized giving. John and Barbara's way of giving back reflected the family's specific interests and concerns, whereas John and George felt the city needed a community-based focal point for giving, something around which all Edmontonians might gather.

John Poole always took the long view. He had an uncanny ability to see a path to success, whether in business, in philanthropy, or working with people. "In this province, where all too many people and politicians believe in the survival of the fittest, and the doctrine of every man for himself, John Poole believed that every man owed a duty to his fellow citizens," wrote Paula Simons in the *Edmonton Journal* after John had passed away at age 90. "He understood that living in a city isn't just about occupying space—it's about participating in the life of a community. It's about taking responsibility for the future."

If Edmonton came of age through the generation of talent that has emerged in the last fifty years, it would be no exaggeration to say that John and Barbara Poole were instrumental in making it so. "Their fingerprints are everywhere," says former ECF CEO Doug McNally. "For starters, there would probably be no Edmonton Community Foundation."

But there is an ECF, and the story of how John Poole instigated and supported its reactivation in the late 1980s is inspirational, not least because he kept it behind the curtain of anonymity for so long. Yet John and Barbara Poole weren't the only ones who were there at the start, nor the only ones trying to deflect credit. If John and Barbara Poole are two names we think of first when we think of ECF's revitalization,



John Slatter played an instrumental role in re-invigorating ECF in 1989.

there was only one name John Poole uttered when he felt it was time to move from dream to reality: John Slatter.

► As fantastical as it may seem, a fair portion of ECF's DNA probably evolved out of the smaller towns and cities of post-World War II South Africa. Organizations are a reflection of the people who run them as well as those who created them. If the ECF is known for being both in touch with today as well as attuned to the future, highly organized yet willing to take chances, moral yet never moralizing, it is because of what John Slatter brought to the job in his own quiet way. John Slatter was born in Pietersburg, South Africa, in 1919, and grew up in Pretoria. He was the youngest son of the local freight master for the South African Railways, and early on in his life he took on the motto "Aanhouer Wen," which is Afrikaans for "He who perseveres, wins." If slow and steady wins the race, John Slatter was a winner and ECF was the beneficiary. Slatter's path to ECF was a circuitous one, but it had a profound effect on ECF. To begin with, Slatter never did actually study law in university. He clerked for a local solicitor in South Africa and was set to do so for five years when World War II interrupted. He joined the Air Force for the duration of the war, ending his service with the rank of Captain. He also met his future bride during the war years. They married in 1945 and were together 56 years.

After the War, Slatter resumed his articles at the same law office. He was admitted as a solicitor in 1946, and eventually formed a successful practice in both Pretoria and Johannesburg. The family and business grew apace, but he became increasingly troubled by the political climate. On the form he filled out upon arriving in Canada, he said of the decision to leave, "I was unable to reconcile my views with those of the government in power."

"He had strong beliefs in rights of all to equal opportunities," says his son Frans Slatter. "And as a lawyer he was also concerned about restrictions on due process, human rights and freedom of the press."

When he left South Africa in 1961 with his wife and their four children, aged 11, nine, seven and five, Slatter left behind his practice, his professional qualifications, and most of their savings, not to mention extended family. They had no home or job waiting and knew no one in

Charity begins at home

Edmonton's first community charitable fund gets underway with \$15 million

"Defy your first impulses," advised 18th-century French count, Casimir de Montrand, "as they are always generous ones." Sensible advice, it was argued at the time, for a member of an aristocratic family forced by its declining fortunes to dispense with *noblesse oblige*. On the other hand, of course, the needs of worthwhile projects always outstrip the money available to pay for them. And fortunately the idea of *noblesse oblige* is not dead. Earlier this year three groups of Edmontonians anonymously raised \$15 million to establish the Edmonton Community Foundation (ECF).

This month, the foundation will receive its first funding applications from cultural societies, historical groups, medical foundations, environmental lobbies and other Edmonton organizations in need of private support. "It's high time the city had a community foundation," says foundation secretary John Slatter. "Edmonton deserves it."

Former Alberta premier Ernest Manning thought so too. In 1971, he and Edmonton lawyer Tevie Miller, who is now associate chief justice of the Court of Queen's Bench, helped establish the first Edmonton Community Foundation. But that first attempt never really got off the ground. The internal organization was weak, and the foundation had an initial endowment of only \$40,000. By contrast, the revived foundation, established by an act of the legislature last fall, has a solid core of business-wise directors willing to commit their time to put its hefty nest-egg to work. Mr. Slatter worked with Calgary's Devonian Foundation before co-ordinating the ECF. Foundation director Eric Geddes served 10 years as chairman of Alberta's largest public endowment fund, the \$300-million Alberta Heritage Foundation for Medical Research. Eight other men and women representing a broad cross section of Edmonton society will serve as directors.

Among them is Ann Dea, a director of the privately funded Clifford E. Lee Foundation and the ECF's first chairman of the distribution committee, the group responsible for allocating profits raised by the investment of the endowment. Of the \$15 million

already raised, says Mrs. Dea, about half has been designated for specific projects and causes. "The rest is up to the discretion of the committee," she adds. "We won't, of course, touch the principal. That is left intact, and will grow over time as people realize the foundation's aim is to improve community life in Edmonton. It's an extremely flexible, exciting concept."

Mrs. Dea points out that community

them in Canada," she says, "but they are excellent ways to raise money for community projects, especially in light of government cutbacks to social services." On the other hand, given that there are already 60,000 Canadian charities, does the city really have room for another? "Well, yes," says Mr. Slatter. "But remember, our foundation is not like most fund-raising groups. We don't go out on funding drives. Ours is mostly a

JOHN LUCAS



Secretary Slatter: *The city deserves this.*

foundations have long been successful in other western Canadian centres. The oldest, the Winnipeg Community Foundation, was established way back in 1921. Today it has assets of over \$40 million and pumps millions of dollars annually into various local causes. The Vancouver Community Foundation controls over \$200 million in assets. By constantly investing its considerable endowment, it's able to commit much needed private capital into the community. The Calgary Foundation, established in 1955, administers the revenue produced by its \$5.5 million endowment in a variety of ways. Some of the profit raised goes to specific projects such as the Hicks Family Memorial Fund which offers opera scholarships to young Calgarians.

Norah McClintock of the Canadian Centre of Philanthropy, likes the community foundation concept. "There aren't many of

word-of-mouth, soft-sell approach." Mr. Slatter anticipates much of the funds the ECF receives in the future will come through bequests from wills.

"It's really a different kind of giving," concludes Mrs. Dea. "The foundation offers a very broad form of gift-giving, considering donors can decide where the profits from their donations should go. It gives everybody a chance to give something to their community." Although large corporate bodies are free to contribute, both Mrs. Dea and Mr. Slatter predict most of their funding will come from small individual donations. "It's the individual who puts up \$4,000 or \$5,000 who are going to make this thing work," says Mr. Slatter. "We've got our nest-egg. Now we want to see how far we can go."

—Brian Hutchinson

In 1990, the Alberta Report ran a story featuring John Slatter about the founding of Edmonton Community Foundation.

Canada. They landed in Halifax on February 11, 1961, eventually making their way to Vancouver.

Upon arriving in Vancouver, Slatter hit the pavement looking for work, but he was soon in Calgary working for Eric Harvie's real estate company. Slatter worked diligently on his admittance exams for the Law Society and in 1962 he became one of the last lawyers in Alberta to not have graduated from university. He ultimately became president of Harvie's company and worked on significant projects that gave him both the experience and satisfaction of working in the public sector. These projects include the creation of the Glenbow Museum (which was initiated mostly to house Harvie's extensive western artifact collection) and Heritage Park. It was Slatter's work in the charitable sector, on behalf of Eric Harvie, that brought him into contact with Ernie Poole and his son John.

In 1966, Slatter decided to move to Edmonton to work for Don Love at Oxford Development. It was through his work with Oxford that he began to know John Poole better and to collaborate with him more frequently. This was not surprising, given that Poole Construction was the builder on many Oxford projects. After ten years with Oxford, Slatter opened his own consulting business, Corporate Counsellors, which he ran for the rest of his life. He was to the end a man who devoted a significant portion of his time to causes he believed in, but he was also very much his own man. John Poole and Slatter had come to a financial arrangement when it came to the work of reinvigorating ECF, but it was always as a consultant and Slatter frequently "donated" his time back to ECF.

As the '70s and '80s progressed, Slatter continued to work for himself, but he did an increasing amount of work for the Pooles, advising them on many business and even family matters. He also advised Bob Stollery during the sale of Poole Construction to its employees. It was only natural then that he and Barbara turned to John Slatter when they decided it might be better to find a structure around which to arrange their philanthropic activities. Frans Slatter remembers that it was during the mid-80s that John Poole spoke to his father about creating a new vehicle to help drive not just the Pooles' philanthropy, but, of greater importance, to make an impact on Edmonton.

In the 1970s, Tevie Miller, Sandy MacTaggart, Louis Desrochers, Ernest Manning, Ivor Dent, and many others, remarked that they hoped one day ECF could be revived, if only there was someone with the will and energy to make it happen.

That someone arrived in the form of John Slatter. Among the many treasures in the ECF archive are John Slatter's hand-written notebooks and records, which reveal his structured and organized approach to the process of reinvigorating ECF. He records everything from speaking to various government representatives to ensure the Act itself was viable and met the needs of those involved, to his dealings with community members, to consulting City administration officials, to chatting with others in the charitable sector both in Edmonton and around the country. There are dozens of reference files filled with information he drew from other foundations around North America. He left nothing to chance. ECF was not going to fail this time around—not if John Slatter had anything to do with it. His experience and methods made the difference.

“When the Poole and Stollery families wanted to revitalize the Edmonton Community Foundation, John [Slatter] was the catalyst that brought it about,” Bob Stollery wrote a few years after ECF was founded. “As the founding President and Chairman, I was gently but firmly guided by John’s insistence that we build an organization that would develop the total trust of the people of Edmonton and northern Alberta. John’s ‘rules’ persist today and have helped mould the Edmonton Community Foundation into the fine success it is.”

John Poole praised his “integrity, wisdom, hard work, and compassion” and called him “the key player in rejuvenating the dormant Edmonton Community Foundation and guiding it through the critical early years.”

The 2001 ECF Annual Report contains a tribute to John Slatter. It described him as old-fashioned, highly principled, and a master of negotiation. In the tribute, Bob Stollery remarked that Slatter was a skilled listener who was capable of deep and profound thought, but that above all, he was “the epitome of selfless service. He would give unstintingly of his time and talents, as long as no public recognition was involved.”

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May 17 clarification in the updated Exec. Summary). She expressed interest and undertook to spread the word. She is expecting to meet with a cleric towards the end of the month who she thinks would like to be informed.

23 Finally heard from Nancy Borkowski who suggests we might talk to one of:

- Tom Thurber - Drayton Valley
- Paul Calabahan - Slave Lake
- Mike Cardinal - Lac la Poudre

She says while "they" would prefer a government member our preference for an Edmontonian MTA was undisturbable and they would fully support Betty Hower. I left word with Betty. She lives near: Legislative Office 427. 2292
Constitution Office 469. 2633
Home 466. 5644

25 Betty Hower returned my call and says she will be delighted to sponsor the Bill and would expect no problem but will withdraw at any time if we would prefer a government member. She says she was a member of the Royal Big Council and

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May 28 expects to be again so was able to ask a lot of intelligent questions. Sae suggests we should contact Doug Mann. I told her Nancy B. had promised support. Sae asks that any material to be sent to her as 204 Legislative Annex. I telephoned Wade Field to advise him and asked for an extra copy of the final draft Bill he will be sending me.

28 Spoke to his father who will have reached from all his duties by Friday. He has no objection to \$100,000 being mentioned but says they may change name of the fund - I suggested we might put it into the Agreement. I suggested the Ken release need not be joint as we would now like to deal with status of the Foundation etc and try for some publicity. He had no objection although they would like to see it but asked that I clear above matter with Hower.

During his time at Edmonton Community Foundation, John Slatter kept detailed, hand-written day books to document the progress of the young Foundation.

“Part of his success,” says Frans Slatter, “was just the self-discipline of checking the details over and over. He often liked to say, ‘If you take care of the little things, the big things will take care of themselves.’ I once found him working on something with extra care and he said he was doing so because he didn’t want someone 40 years from now saying, ‘Why didn’t Slatter think of that?’ My dad was always like the fairy godfather around the early days of the ECF, there to lend a steady hand, always leading them in the right direction. He was definitely a guy who made the trains run on time.”

► Even though, in 1973–74, John Poole and Don Love had decided not to pursue forming a new performing arts foundation, John Poole would periodically ask Slatter about the idea. Slatter’s response was always “We need men and money.” To which Poole would reply: “How much money? And what sort of organization?” In early 1987, Poole finally asked John Slatter to undertake specific and focused research. He summarized his findings in a long memo to Poole on April 14, 1987. There were, he said, major distinctions to be drawn “between perception and planning, and practicalities and performance; perhaps, above all, that this is a subject very easy to turn into the proverbial camel rather than the desired Clydesdale.” (Referring, one presumes, to the old joke that a camel is a horse designed by a committee.)

He went on to tell Poole that he’d come across various surprising things during the course of his research, such as how small and relatively insignificant the existing community foundations were in Canada, aside from Vancouver and Winnipeg. But the biggest surprise, he said, was that Edmonton already had an Edmonton Community Foundation!

“I do not know,” he wrote, “who the driving force was, but apparently Tevie Miller spearheaded the legalities. I gather it never got off the ground and has no funding. Tevie says for all practical purposes it is defunct. Doubtless that structure could be taken over if desired, (further legislative amendment and updating would be necessary) or another structure could be adopted if better, but the ‘name’ could not conflict.”

Slatter also noted in his memo that very few of the existing foundations included the fields of education or the media, which could

be the root of a later amendment to the Act to include educational activities. Any new endeavour, Slatter added, would need “a solid capital or income base to start” and “should probably not see start-up or regular funding from any level of government, as this would immediately introduce political elements.” He recommended that it would be best for “one or two people” to work on the initial constitution, direction and purpose, and to arrange the finances. “To get too many in the act could well produce both a camel and take a long time to get it to water.” If it was done properly, he felt, others would join willingly.

Slatter’s prose is a joy to read, but his common sense is striking. No wonder Poole responded by asking him to forge ahead with his work. John Poole wrote a letter to his brother George in the summer of 1987, bringing him up to speed on Slatter’s research and noting that he’d instructed Slatter to keep researching, but “to keep [his] name strictly out of any such discussions.” There were various reasons for wanting to remain anonymous, but Frans Slatter points to a key point: “One great insight that I know my dad had was that it had to be a blind fund, or at least a partially blind fund. This was what allowed the Winspears and others to put money into it, especially in the early years, because they knew it was an Edmonton fund and not a Poole fund or a Stollery fund. That was part of the secret of it. They all knew, and my dad underscored it, that if they made a big splash about them starting it, people would just say it was a Poole Family Fund.”

This remains a central pillar of ECF’s philosophy—that every donation counts, every donor counts, and every contribution counts regardless of whether it’s a dollar or a thousand dollars; or whether it’s an hour or two years’ worth of volunteer time. ECF today has over 1,200 funds and the principles around the symbolic and real importance of treating every contribution with equal respect were set before there was a single fund.

Slatter also told John Poole that his research indicated it would take at least \$10 million to get it kickstarted. To which John Poole immediately replied: “You’ve got it!”

Slatter did voluminous research and wrote further briefs for the Pooles over the months that followed. By the summer of 1988, the Poole brothers were devoting significant energy and thought to the material Slatter was putting in front of them. Structures and organizational

principles were beginning to take shape in Slatter's head. He had conversations with other community members, such the Winspears, the Shaws, the Rice family, and the Allards. Slatter made it clear to the Pooles, however, that they had to keep the circle tight because, "it would delay and perhaps retard deliberations if too many wishes and preferences had to be accommodated." The only other person they brought into the inner planning circle was Bob Stollery, who, Slatter wrote, "had been kept aware by John and George of their proposals and had indicated he would join on the same basis if they succeeded." Again, in typically understated Slatter style, he reported that, "in due course Bob phoned me at home to confirm he would match their sponsorship in two instalments as his securities matured."

During the deliberations of 1987-88, the three key players accepted one principle, which was that despite personal or family preferences, no one field of philanthropy should be favoured and that their initial sponsorship, wrote Slatter, "would incorporate not less than 50% discretionary money." This was a major decision that ECF's founding donors, Bob and Shirley Stollery, George and Rae Poole, and John and Barbara Poole, adhered to. Other major donors followed suit, including Allison Rice when she contributed funds which her late husband had been expected to provide.

John Slatter credits Bob Stollery with the initial idea of discretionary funding, and this principle remains crucial to the success of ECF. This is how it can make proactive decisions of wide-ranging benefit to the community, rather than being tied to the directed fund wishes of donors.

"The rationale behind the 50/50 split was brilliant," says former ECF CEO Doug McNally. "It gave ECF instant legitimacy and credibility because ECF was deciding what should be supported, not just the three families. They wanted ECF to succeed and they thought the best way to make that happen was not just to fund it, but to allow it to establish its own identity as quickly as possible."

As 1988 progressed, Slatter was juggling multiple balls: setting up financial accounts, working on amendments to the Act, investigating the charitable status reinstatement, drafting a new constitution, securing the endorsement of the original founders, and quietly discussing the idea with other like-minded citizens. When Slatter first began to let people know of the plan to reinvigorate ECF (prior to Bob

Stollery coming on board), no one believed he already had \$10 million committed. Imagine his eventual delight when he was able to announce that they were starting the new Foundation with \$15 million!

Even though ECF had not yet been formally reinstated, word had gotten around, which was how Margaret and Bob Cormack came to hold the first charitable receipt ever issued by ECF, for \$500. John Slatter had written an Executive Summary of the planned structure and activities of ECF in late 1988 and had been using it during talks and handing it out to select citizens. On January 9, 1989, as recorded in his notes, Slatter received a call from Margaret Cormack. She and her husband had read the Executive Summary and were very impressed. She told Slatter that they wanted to donate \$500. Slatter wrote in his notes: “She will send a cheque soon. I suggested she leave this undated as I could not as yet issue a charitable receipt but would do so in due course.”

In May 1989, Slatter told the Pooles and Stollerys that the re-activation was being received enthusiastically, though he remained surprised at the “astounding public lack of appreciation of the function of a community foundation.” Slatter accurately predicted that ECF would not grow until it could prove its performance and impact, and educating people about the work ECF does remains a key goal to this day. He also remarked that ECF would only be successful if it could stock its committees with high-profile Edmontonians who were “young aggressive workers, men and ladies, age groups, ethnic and other backgrounds and, above all, interest.”

In other correspondence, John Slatter wrote, “it became clear that the efficiency and performance of the Foundation would revolve around strategic investment, expert accounting and a distribution program free of major dispute or criticism. The Foundation found the perfect person in Ann Dea.”

Dea had ample experience in charitable distribution, having worked with the Lee Foundation, the City of Edmonton Social Services Advisory Committee, and the United Way. Many years later, Slatter wrote, “It is difficult, and in fact unfair, to distinguish any worker among the tremendous support the Foundation has enjoyed, but the contribution of Ann, and indeed those that worked with her cannot be passed by unnoticed. Starting from scratch, and with a deadline of



Doug Stollery, the son of Bob and Shirley Stollery, has maintained a close relationship with ECF as a way to continue supporting the community.

less than six months before the first distribution of significant income, Ann established a Distribution Committee, formula, procedure and example second to none. It is astounding that her successors have been able to sustain her example.”

Through a September 18, 1989 newsletter, Slatter informed Edmontonians that Royal Assent had been given, that Bob Stollery had been named President, that a further anonymous (Stollery) \$5 million donation had been pledged for January 1990, and that Ken Aberle, Len Dolgoy, Woody Johnson, Stan Milner, Ron Odynski, Gerry Pearson, Neil Reimer, Ann Dea, Sheila Edwards, Janice Rennie, Eric Geddes and Bob Stollery were comprising the Board (though Slatter was again reiterating in a private memo to John and George Poole that more gender and cultural diversity was needed). Louis Desrochers and John Poole were named as Honorary Chairs. ECF, said the newsletter, was built for Edmonton to serve “the fields of social services, arts and culture, education, and other charitable and cultural endeavours, without favour and regardless of age, sex, race or creed.”

The board held its first meeting in October 1989. Slatter opened the meeting with an anecdotal overview that did not mention any names:

“In the fall of 1988, I suggested an upgrading and updating of the Act and, for a City like ours, start-up funding of \$10 million, at least 50% discretionary. ‘You’ve got it,’ was the answer. They gave me the green light and, with the blessing and, when needed, the assistance of the original petitioners, the Committee to re-activate the Foundation was formed. Almost a year later to the day another Edmontonian phoned and added another \$5 million to the fund. It was a Monday and all I could say was, ‘What a wonderful way to start off a week.’”

“I imagine what happened was that John Poole would have just walked down the hall,” says Bob Stollery’s son, Doug, “and said, ‘I think this is a really good idea, what do you think?’ Dad would’ve said, ‘Yeah, I’m in!’ John would never have said this is something you must do. That just wasn’t John at all. But, remember, this was taking place in a world, in a culture, in a community, where there wasn’t a history of that kind of philanthropy. Today, when people have been making those kinds of gifts for the last thirty years, it’s not as shocking or surprising, because there’s a tradition. That tradition didn’t exist at all then. I’m sure in the city at that point no one had ever made a donation of that size.”

At that first meeting, Slatter also told the new board about the reaction from foundations around the country to his news that ECF was commencing operations with \$10 million in the coffers and another \$5 million pledged: “Thanks to our sponsors we have a magnificent start. Responding to our last newsletter Calgary said their effort was ‘outrageously developmental.’ Winnipeg commends them for an effort that means we have a Foundation ‘among the top four in Canada and in the upper echelons of all on the continent.’ I believe Ottawa expressed it best. They just said, ‘WOW!’”

Slatter went on to encourage the first board with words that still guide ECF. “The good of the Community must always be paramount,” he told them. “The Foundation will suffer the moment there is any cloning, the moment there is lack of independence, the moment a partisan award is made. We should expect the growth of the Foundation to be slow. The concept is inspiring, but we need performance to entrench the support and goodwill of the Community. My personal thanks to each of you for joining the team and for the patience and courtesy I have always enjoyed. I believe we have a

first-class team. I believe you will make the most of the opportunity our sponsors have provided. There is vast room for creativity and we should never hesitate to be aggressive and innovative.”

The process was now nearing completion. Investment strategies were solidified, aided by the wise counsel of various Edmontonians, but primarily through the oversight of Bob Stollery. Given that so much was being put in place by volunteers, it was noted that the hiring of an Executive Director was not an urgent priority. However, the sponsors and the new board agreed that Lorne Leitch would be an excellent candidate. He was due to retire from his role at the University of Alberta early in 1990, and although he agreed to become ECF’s first executive director in 1989, he wasn’t formally scheduled to start his new job until September 1, 1990 (though he did act as ECF’s delegate at the First National Conference of Community Foundations of Canada held in April 1990).

Slatter even turned his attention to basic logistics. Accommodation and furnishings were supplied without cost by the Royal Bank. Accounting and secretarial services were provided by Jim Brown and Judith Peglau. Most of the furniture was borrowed, donated or acquired at discount prices.

John Slatter had co-ordinated what the original group could not, no doubt because he had the backing of the Pooles, but also because it was the right time.

“It’s hard to overestimate how transformational it all was,” says Doug Stollery. “They were truly leaders in philanthropy and we have to go back to that time to understand the importance of making donations to health-based causes and education-based causes and arts-based causes. This was not common in the ’60s, ’70s and ’80s. It was an entirely different and new and innovative thing to say, ‘Hey, let’s take this thing that has no real life at the moment and no money, but let’s create an entirely new concept around it.’ And to do it on a scale that blows everything else out of the water.”

ECF opened its doors in October 1989 with an office at 601 Royal Bank Building at Jasper Ave and 101 Street (which was quite handy and not at all coincidental, given that Slatter’s company, Corporate Counsellors Ltd, was located in Suite 606 at the same address). Naturally, John Slatter preferred that others gather the accolades. A decade later, he



ECF opened its doors in October 1989 with an office at 601 Royal Bank Building.

Judith Peglau poses with Craig Stumpf-Allen at ECF's 2008 Annual Meeting. Peglau was hired to provide secretarial services to ECF in 1990. Stumpf-Allen is ECF's Director of Grants and Community Engagement.



wrote, “While they would be the first to decry it, enough cannot be said of the philanthropy and perseverance of John and George Poole. They and their families have continued to support every aspect of the work of the Foundation. Notwithstanding many of the principles and practices are contrary to their personal preferences and philosophies, they followed and endorsed the blueprint established by Cleveland, entrenching the essential trusts, but with few restrictions on future operations. Their greatest innovation was their insistence that at least one-half of their sponsorship contributions be entrusted to the discretion of the Board. A sentence that might well have been the watchword of the sponsors would be: ‘A foundation is a public trust; it is not simply a private prerogative to be maintained as a private sanctuary and for private purposes.’”

A monumental effort had effectively concluded. ECF now existed and its doors were open. But as 1989 drew to a close, the important work was only just beginning.

CHAPTER 3



1989–1994

PUTTING DOWN ROOTS

Through the Headstart program children have a healthy start in life and families learn to build a firm foundation on which children are able to learn, grow and reach their potential.

WHEN ECF OPENED ITS DOORS for the first time in mid-October 1989—meaning, when it literally opened the doors and there was someone sitting in a chair in an office with “Edmonton Community Foundation” on a shingle on the door—the city of Edmonton was on the cusp of yet another significant upheaval. The Progressive Conservatives had won the recent provincial election, but Premier Don Getty was ousted from his own riding. Ralph Klein was gaining popularity predicated on a debt-eradication program that would shortly leave Edmonton and the rest of Alberta with an infrastructure deficit. Jan Reimer, the daughter of one of ECF’s first board members, Neil Reimer, was Edmonton’s mayor. Also, Wayne Gretzky had been traded in August the year before, and the Oilers lost in the

second round of the playoffs to the team Gretzky had been traded to, the Los Angeles Kings. They would win the Cup again a year later, but at that time it was easy to think the glory years were over. On top of all this, oil prices were plunging and the provincial debt was skyrocketing.

What it all added up to was that ECF commenced operations during a less-than-buoyant time, which makes the gesture of confidence shown by the three founding families even more remarkable. They demonstrated a belief in our city that might seem natural today, but at the time it was almost an act of faith. It was risky, courageous and not at all guaranteed to succeed.

Lorne Leitch started on September 1, 1990. There were many early priorities, but it's fair to say that the two most pressing were to outline a stable investment strategy and to set a strong and independent disbursement pattern. The disbursement strategy was covered by hiring Ann Dea; the investment strategy was more complicated. It involved Slatter talking to many of Edmonton's more prominent businesspeople, seeking their advice, and soliciting information from various foundations across North America. Luckily, Slatter also had Bob Stollery on hand, and the investment approach they decided on remains in place today.

In early January 1990, Slatter distributed a newsletter about the first operating quarter and fiscal year-end. It noted that ECF had \$15.5 million in capital, and that it expected to make its first distribution from income by the summer of 1990. Ann Dea's grant guidelines had been approved by the board, and ECF intended to invite grant applications in February. In an article that appeared in the mid-January 1990 edition of the *Alberta Report*, John Slatter related the story of how ECF was formed. The article was noteworthy for many things, not the least of which being that it features one of the very few public photos of John Slatter, captured standing on banks of the North Saskatchewan River. He was quoted as telling the journalist Brian Hutchison that it was "high time the city had a community foundation. It deserves it." Ann Dea was quoted in the same piece. After explaining how half the original funds had been designated by the donors for specific projects and causes, she said, "The rest is up to the discretion

of the committee. We won't, of course, touch the principal. That is left intact and will grow over time as people realize the foundation's aim is to improve community life in Edmonton. It's an extremely flexible, exciting concept ... It's really a different kind of giving. It gives everybody a chance to give something to their community."

"We've got our nest egg," Slatter said in conclusion, "Now we want to see how far we can go."

In late March, Slatter sent out a progress report. He reported that Lorne Leitch was scheduled to start September 1, 1990 but was acting as a consultant in the interim. The first set of grant applications had come in and 136 organizations had applied for assistance—an impressive number for an organization that was all but unknown a few months earlier. Slatter did add that "the Distribution Committee imposed few constraints in order to better assess the needs in the community. In the light of experience gained, the Grant Guidelines will be reviewed prior to the next invitation in August." Lastly, he announced that the first Annual Report would be tabled at the first AGM to be held May 17.

Mayor Jan Reimer offered a few words on the first page of the Annual Report, noting that ECF "is dedicated to enriching the quality of life for Edmontonians, now and in the future." At the end of the AGM, John Slatter, the Pooles, and the Stollerys must have sat back in awe that it had all actually happened.

"My dad loved ECF," says Doug Stollery. "I know he had a vision around what ECF should look like and how it should function, and that's really important for an organization. It's one thing to get the funding; it's another to get a structure in place about how an organization works. He was a visionary, but he was also a real nuts and bolts guy. He didn't float above it all. He got down and got things done."

Doug Stollery described how in the very first days there were so few staff that everyone had to chip in at every level. "There wasn't a large staff to do all the things that needed to be done, and there weren't a lot of procedures in place. Today, when things have been done under a certain structure for thirty years, you don't even think about it. It's just automatic and obviously that's how you do it. But at the beginning that was not the case. Somebody had to decide how to structure the

organization, and what kind of staff it needed, and how it was all going to work. No doubt my father used some of his experience from PCL, but he also used good basic common sense.”

One such piece of common sense was coming up with the ground rule that administrative expenses should not exceed one percent of the asset base, as some foundations take as much as 15% to cover overhead costs. Indeed, for many years thereafter, even during periods of considerable growth, the one percent rule remained in place and administrative expenses rarely exceeded this figure. In fact, it wasn't until 2005, when ECF assets were nearing \$200 million, that administrative costs for the very first time crept over one percent.

A happy side-effect of the one percent rule is that ECF's staff has remained small and tight-knit. Whereas other organizations exude a more corporate environment, ECF has maintained a very personable atmosphere at its offices.

A portion of John and Barbara's initial gift to ECF was designated to help cover overhead. Their reasoning being that they wanted future donors to know that their gifts were going entirely toward grants. This bolstered the fact that regardless of who is giving to ECF, every donation is treated equally.

With three decades of perspective, we can see now that the magic that brought ECF to life was actually a merging of three ways of being: the Poole philanthropic passion for the community; the Stollery humility and common sense; and the Slatter organizational acumen. Of course, each possessed elements of the other, but they combined to create an organization that from the start was prudent with other people's money, efficient and detail-oriented, and passionate about its community. It was a winning hand. The tabling of the first Annual Report underscored that it was time to start spreading the word...and the grants.

► It is wonderful, but also revealing, to look at the variety of programs supported by ECF before the Foundation itself was barely six months old. The initial distribution of grants demonstrates the diversity of artistic practice in the city at the time, as well as its needs. Among the grant recipients were Alberta Ballet, Alex Taylor School, Ben Calf Robe Society, CNIB, John Howard Society, the Edmonton Art Gallery, Citadel,

Brad Pickford, mid-manager at Youth Empowerment and Support Services (YESS) was the recipient of ECF's Community Scholarship in 2010, an award established to connect individuals involved in community work with skills development.



Donors and their families enjoy an evening at Fort Edmonton Park during ECF's 2016 donor appreciation event. ECF has provided several grants to support Fort Edmonton Park's programming.

WinHouse, Jewish Family Services, Fort Edmonton, YESS, and Stage Polaris.

By the end of 1990, ECF assets had grown to nearly \$17 million and it managed to disburse over one million dollars to 60 different agencies. This alone gave ECF almost instant credibility in the community and encouraged others to step up; overnight ECF became something every Edmontonian could be part of.

A significant, and in hindsight almost bittersweet, moment came on October 31, 1990, when John Slatter wrote his final memo to John and George Poole before he retired. He opened it by saying, “My last status report was termed the penultimate report of the ‘Committee to Reactivate the Foundation.’ I think we can say this is the final report as the program you started in 1988 and climaxed with outstanding sponsorship on October 31, 1989 has progressed to the completion of the first active year. Much remains for the Foundation to do, but I think there can be satisfaction in what has been achieved.”

With that he signed off.

The trajectory of success continued in 1991. The community was beginning to understand what it had in ECF. Grant applications increased, as did grant numbers and the overall amount. Several notable institutions received funding, including Boyle Street Community Services Co-op to introduce a school lunch program in inner city schools. The Edmonton City Centre Church Corporation received \$57,500 over two years for its Crossroads Outreach Program, which assists juveniles in prostitution to leave the streets. The Métis Women’s Council of Edmonton was able to acquire a van for the transportation of Indigenous seniors with a grant from the Foundation. A grant of \$25,000 assisted the Edmonton Chapter of the Schizophrenia Society of Alberta with hiring a co-ordinator for the purpose of increasing memberships and launching a public awareness campaign. The Edmonton Folk Music Festival received \$12,500 to acquire reusable plates, which have dramatically reduced the production of solid wastes at this and other local festivals. The Phoenix Theatre received grants for a variety of projects, including the purchase of a computer and the sponsorship of the 1991–92 season at its downtown theatre. Finally, a \$15,400 grant helped the Friends of the Provincial Museum catalogue and document an important collection of artifacts from the



The Edmonton Folk Music Festival set up The Don Snider "Go Wildly forward" Scholarship through ECF to help their volunteers pursue post-secondary education.

Charles Camsell Hospital that related to the Indigenous peoples of the northern territories and western provinces. The Edmonton Community Foundation also played a key role in two important civic projects. The sponsors of the Clock Tower project at the new City Hall and of the Ezio Faraone Memorial Park were relieved of a considerable administrative burden when the Foundation volunteered to administer the funds they had received and to issue charitable receipts to the contributors.

Even in its earliest incarnations, ECF demonstrated a remarkable breadth and scope of support—from youth to seniors, culture to social issues, and immigrants to Indigenous peoples. Yet Bob Stollery felt that although ECF's visibility was rising, it still remained "unknown to [a] large number of charitable Edmontonians. For the Foundation to meet the growing demand for philanthropic dollars, we must increase our assets. We need to tell more people about what we do and the opportunity that the Foundation provides for them to put something back into their community in a way that will benefit Edmontonians now and in the future. We need to explain the attractive benefits we offer to those of our citizens with charitable interests. We need to let them know about the care with which we manage funds entrusted to

us and of our commitment to getting the most mileage out of charitable dollars. And we need to let them know that we welcome all donors, regardless of their means.”

This could stand as ECF’s *raison d’être*. His words are as applicable today as they were then. We welcome all donors, regardless of their means. Every donation is of equal value, because every donation to ECF, every contribution to Edmonton, has the same weight of intention to make our community better.

Sadly, Bob Stollery also announced that it would his last year as President. Prophetically, he spoke to something that has also become an ECF calling card. “I believe that collaborative efforts between non-profit organizations, foundations, business and government, will become increasingly important. The Edmonton Community Foundation can serve an important role as the catalyst to bring these forces together in the furtherance of our common goal—to improve the quality of life of our citizens.” These words have informed everything ECF has done since: always open to collaboration, always looking for links, always willing to act as a catalyst.

This AGM report also offered the first Executive Director’s message from Lorne Leitch. In it, he offhandedly mentioned that, in just its second year of operations, ECF was already the fourth largest foundation in Canada. His final remarks pointed out another emerging trend, one that has only increased since, namely, that other organizations were entrusting management of some or all of their own endowment funds to ECF. This included, in 1990, NAIT, the Glenrose Hospital, Winnifred Stewart, and the Grey Nuns Hospital.

A sign of the astonishing early impact ECF was already making on the community came in early 1993, when Mayor Jan Reimer wrote that ECF, “has accomplished great things in its short life. By the end of 1992, it had re-invested more than \$3 million into our community, bolstering spirits as well as budgets among more than 100 agencies.”

Three million dollars to 100 organizations. It’s worth pausing to think about that. In only its second full year of operations, ECF was already distributing roughly 20% of its original endowment funds. ECF’s assets increased substantially that year, largely due to the decision of Francis Winspear to take five million dollars from the Winspear Foundation and put it under ECF management. It was a



In 1992 the Winspear Foundation gifted its assets to Edmonton Community Foundation, trusting the Foundation to carry on the philanthropic work with "diligence and efficiency."

complicated arrangement, in that although ECF would "hold" and manage the assets, half the directed disbursements from the fund were overseen by a transitional committee of former Winspear directors. But, as with the other major gifts to ECF in the early days, the other half was to be disbursed at the discretion of ECF. Winspear's decision was a gesture of faith in ECF's direction and oversight, and the symbolism behind the gift was more telling than the dollar value. Francis and Harriet Winspear were major philanthropists in Edmonton and although their legacy is still great today, their renown and the respect with which they were held in the community was significant while they were alive. Francis Winspear passed away in 1997, but ECF penned a thank you to him well prior to that. It described his accomplishments as "legion." He was a major figure in the business world and at one

► *Dr. John Evans, a volunteer at the Boyle McCauley Health Centre Dental Clinic, provides dental treatments for patients with low incomes and inadequate dental coverage.*



point he had or shared a controlling interest in nearly 40 companies. Along the way, he developed a passion for philanthropy and developed just as much insight into giving his money away as into making it. It was Francis Winspear who uttered the immortal line that, “Giving money requires even more prescience, more imagination, more executive skill, than making it.”

Of course, the Winspear fund wasn't the only significant news of 1992. The asset base was growing, yes, but even more impressive was the astonishing diversity of organizations ECF was supporting. The list is long, but a snapshot includes Headstart, the Film and Video Association of Alberta, Boyle-McCauley Health Centre, Brian Webb Dance, Dickinsfield Amity House, the Edmonton Art Gallery, the Edmonton Public Library, E4C, the SPCA, the Women's Shelter, Glenrose Hospital, Jazz City, the Mennonite Centre, Prospects Adult Literacy Association, Alberta Ballet, the Schizophrenia Society, the Terra Association, Wings of Providence, and the Youth Emergency Shelter.

It was also a year of transitions, both coming and going. Future Executive Director Martin Garber-Conrad joined ECF as a member of the Development Committee (he was running the Edmonton City Centre Church Corporation at the time). Jean Forest took over as President from Bob Stollery (who remained involved as part of a joint informal advisory duo with John Slatter). Jean Forest was appointed for her many accomplishments, but her appointment also sent a strong message of gender equality to the community. She worked as a teacher in Manitoba before moving to Edmonton with her husband Rocky, where she was eventually appointed to Alberta's Human Rights Commission. She also served as the Chancellor of the University of Alberta, was appointed to the Canadian Senate, and was named an Officer of the Order of Canada. There are other fascinating links. Rocky originally worked for PCL as a carpenter when he and Jean first moved to Alberta, but he broke away to form his own company in 1952. Then, nearly fifty years later, PCL bought Forest Construction! Full circle, indeed.

The most significant development in terms of personnel in 1992, however, was the retirement of Lorne Leitch after just two years on the job. Leitch had agreed to a two-year contract when he accepted the

◀ *Greg Jaycock,
Jean Forest,
Robert Stollery,
Doug McNally,
Ron Odynski and
John Mitchell.*



Volunteers at Sport Central refurbish bikes for low-income families. Sport Central is one of more than a dozen charities that have received support through the Ann and John Dea Family Fund at ECF.

position, and he'd always made it clear he would fulfill that term and not seek another. John Slatter and the Board had discussed the end of Leitch's contract as much as eight months earlier. A stalwart volunteer, Bill Mathewson, had been hired as Director of Development, and Slatter had written in his notes that he felt Mathewson would be a "significant candidate" for the Executive Director role upon Leitch's retirement. This proved to be true, as Mathewson did indeed step into the role later that fall, avoiding the kind of external headhunter search that Slatter labelled "expensive and ineffective."

In this same set of notes in which he first identified Mathewson as a potential Executive Director, Slatter hailed the success of Ann

Dea's distribution program, which he called the "outstanding feature" of ECF to that point in its history. The community had taken to ECF, particularly in the diversity of organizations and activities applying for funding. Ann Dea and her team were not just doing distribution, they were also contributing to that familiarization work Slatter felt was so vital. The role came naturally to Dea, as her prior experience showed, but she always felt strongly that ECF was working because, as she once said, "it had such a good start, and it's been fairly open about everything, and tried not to be the prisoner of any one group."

Like so many of ECF's early staff and volunteers, Dea not only had to figure out many things on her own, she often had to do most of the work herself. Once Slatter hired her, she essentially set up the entire first iteration of the granting program on her own, inventing systems and processes and doing all the administrative work. From the start, she focused on understanding what was actually happening out in the community, working with people to give their applications the highest chance of success. She also did follow-up, not merely to ensure grant monies were properly spent, but to learn how those results could improve the process.

Some years later, just before she left the Board, Ann Dea happened to mention that she was thinking of creating a fund through some anticipated inheritance money. To her surprise, the Board and some other friends established a fund in her family name, an amount she and her family matched—it became the Ann and John Dea Family Fund. "I've been so fortunate all my life," she said at the time the fund was created. "You have to give something back. You don't have to be a millionaire to be a philanthropist."

These were words many Edmontonians were starting to live by through ECF.

CHAPTER 4



1994–2005

A MATURING FOUNDATION

▲ *ECF staff members circa 2002.*

◀ *Governor General Adrienne Clarkson addresses stakeholders at ECF's 2005 Annual Meeting.*

HISTORY MADE ITS PRESENCE FELT yet again in 1993. Still just a few years into its existence, ECF found itself grappling once more with volatile political and social circumstances. Ralph Klein had won the 1992 election on an austerity budget, pledging to wipe out the provincial debt. What followed, no matter your political stripe, was a period of constriction in the services offered by government. It was also an era in which Klein began his process of privatizing many of what were formerly government-run operations, such as liquor stores and registration outlets. In short, these were times of transition.

Yet despite tenor of austerity—or perhaps because of it—Edmontonians contributed generously to ECF, and investment exceeded all expectations. The fund had grown to \$32 million (now more than double its founding amount) by the end of 1993. In its 1993 Annual Report, it was noted that ECF had by that time disbursed \$4.3 million to 207 charitable agencies

since reactivation in 1989. President Jean Forest wrote that, “Although the past year has been difficult, even devastating times to many, the generosity of Edmontonians enable ECF to maintain its assistance to local charities.”

As was becoming the norm, ECF disbursed grants to charities providing core services, but also to some of Edmonton’s most forward-thinking organizations and causes. These included the Action Committee for Survivors of Torture and Trauma, AIDS Network of Edmonton (now HIV Edmonton), Alberta Craft Council, the Library, the Art Gallery, McMan Youth Services, the Boys’ and Girls’ Clubs of Edmonton, Teatro La Quindicina, the Bissell Centre, Klondike Days (now K-Days), the Northern Alberta Brain Injury Society, the Pastoral Institute, the Sexual Assault Centre, the Western Canada Wilderness Committee, and the Writers’ Guild of Alberta. ECF also funded the production of a book looking at the complicated past of the Charles Camsell Hospital, *Soapstone and Seedbeads: Arts and Crafts at the Charles Camsell Hospital: a Tuberculosis Sanatorium*. Nearly \$900,000 was granted to 78 agencies that year.

Three more funds placed their assets under the ECF banner in 1993: The Annie Hole Children’s Nutrition Fund, The Alison B. Rice Endowment, and The Glenora Fund, all of which totalled more than \$3.5 million. Mrs. Rice had donated a significant amount anonymously in 1993, but after her death in March 1994 her family decided that the fund should henceforth be known as the Alison B. Rice Endowment, and added another substantial amount to the fund. The Rices were inspirational members of our community. When Alison Rice was a young lady, she worked as a teacher in one of the tougher areas of Glasgow, and it was this experience that showed her the profoundly negative impact poverty and poor housing can have on children. Almost from the time she and her husband moved to Edmonton, they donated anonymously to causes seeking to eradicate poverty and offer affordable housing. It was this that led her to Habitat for Humanity. After she’d passed away, her son Christopher said of his mother that, “it was her intention to empower individuals by providing a means to build not only homes, but also a sense of pride, accomplishment and stability within the family.”



Doug McNally delivers remarks at the launch of the Our Children's Millennium Fund. McNally was ECF's CEO from 1995–2005.



Laura Keegan, HIV Edmonton's Director of Resource Development and Public Engagement. In 2016 HIV Edmonton, with support from ECF, launched the award-winning online initiative HIV Tonight, focusing on gay and bisexual men and using raunchy humour to emphasise the importance of getting tested for HIV.

The austerity of the Klein years continued through 1994 and into 1995. These were difficult times internally as well. Bill Mathewson stepped down as Executive Director and was replaced by the newly-retired Chief of Police, Doug McNally. He was a popular and effective Chief and brought with him significant name recognition. “I know my dad was delighted and amazed,” says Doug Stollery, “that someone with the profile and résumé of Doug McNally was going to take over ECF.”

Before McNally’s appointment, John Slatter wrote to John Poole, “our basic need at this time would indicate a shortage of donors rather than dollars.” Referencing McNally’s previous role as Chief of Police, Slatter wrote that McNally seemed a “mature and pragmatic” leader. It would only be natural, said Slatter, if McNally displayed an initial emphasis on the “causes for crime,” but that he would ultimately “seek and present a good balance” for the arts, culture, history and education. McNally was not able to start until February 1995, but from the minute he walked in, he focused on public awareness.

Slatter intuitively understood that this was a turning point in ECF’s history. With stable funding, a growing community presence, and, now, a high-profile Executive Director who brought a significant community to the job, it was perhaps the right time for him to quietly begin to extricate himself from the oversight role he’d been playing for the first five years of ECF’s life-cycle. He referenced the young “shakers” among the directors and volunteers, and said it was gratifying to see their energy and ideas. He sensed an urgency for change, which, “if constructive, should always be welcome.”

► John Slatter had been right again. Doug McNally did represent a turning point in ECF’s history. McNally had been part of the police service for three decades, and was still young, only 51, when he announced he was retiring as Chief. He knew he still wanted to do meaningful work but wasn’t quite sure in what capacity. After giving some thought to moving to a different city for a new job, his wife talked him out of it, saying she wanted to stay in Edmonton. “Bless her heart!” says McNally now. “Our family is here, our children are here, I was still young, so I re-focused my energy on running a charitable foundation.

“Not that I knew exactly what I was getting into,” laughs McNally. “You never really know until you step through the doors. But it was without doubt the best ten years of my working life. A phenomenal organization. I met some wonderful individuals and had an opportunity to help build the Community Foundation. I treasure the experience.”

McNally had come from an organization of 1,500 people and as Chief of Police in a metropolitan area, he had staff to do his administrative work. He liked to joke that when he started at ECF he knew what a fax machine was...in theory. “But then I suddenly discovered what they looked like. It was a culture shock.”

Once he'd settled in, McNally realized that although ECF at the time had just two full-time and one half-time staff, himself included, it punched well above its weight. When he started, ECF had roughly \$35 million in assets under management, which although not inconsiderable was not particularly daunting. He knew going in that his purview was growth and, to use the modern term, increased brand recognition. He managed to merge the two in a smart and organic way, all while overcoming his single major concern about the job.

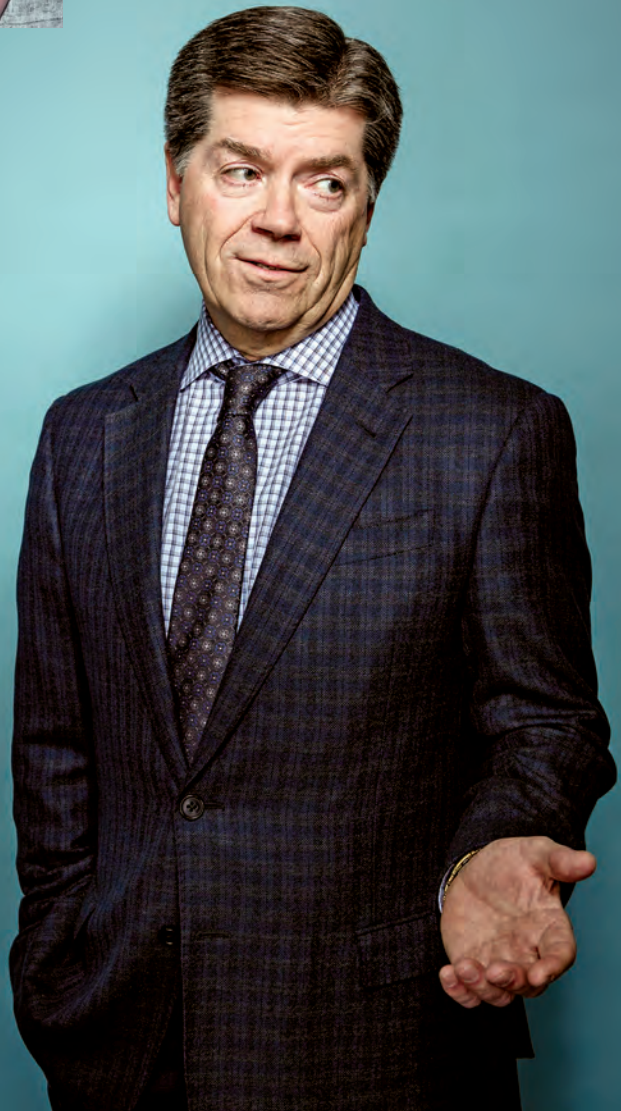
“When I first joined the organization,” he says, “the one misgiving I had was, how was I going to ask people to donate money? I'd never done it before in my life and I thought it was going to be uncomfortable. But after I'd been there a few weeks, it occurred to me that I didn't have to ask people to give money. Rather what I had to do was describe to them the opportunity to do something for this community, perhaps leave a legacy in the doing, and provide them with that opportunity. So rather than ask for money, it became a discussion that would allow them the opportunity to give back to their community. If they'd lived here, worked here, and felt that the community had done well by them, this was an opportunity to create a legacy and to give back to the community. That made it all a whole lot easier.”

McNally remembers stepping into a new world of diversity and vitality, and 1995 was a good year to start. ECF now had one of the highest percentages of discretionary funds of any community foundation in Canada. The original plan to give ECF staff and committees enough of a discretionary asset base, and therefore a major decision-making role, was paying off. ECF was establishing a



Anne Smith from the United Way addresses stakeholders at ECF's 2010 Annual meeting. ECF and the United Way have a long history of partnering together to support the community.

Founding Board Member and President, Ron Odynski helped ECF find its place as a trusted steward of community good in Edmonton from 1989-1999.



community presence and demonstrating an ability to respond with agility to community needs. Disbursements in 1995 totalled \$1.7 million to 195 agencies, which meant that in only its sixth year, ECF had already distributed more than \$7 million to the community.

When Doug McNally and new President Ron Odynski (who as Chair of the United Way in 1989 had contributed to ECF's renaissance) penned a joint message for the 1995 Annual Report, they said that the theme of the report was "One Community—Many Voices." Also, fascinatingly, this report illustrates the growing belief in ECF's role as a catalyst in the community. For the first time, ECF publicly stated that it was not just a distributor of grants based on the applications that happened to come in, but that it was a proactive and even predictive force. Odynski and McNally wrote that ECF had as its role to "listen to and add our voice to the many voices in our community, be they donors, charitable agencies or individuals. Through our work with agencies, we have developed a high level of knowledge about the needs in our community. The Edmonton Community Foundation has become a conduit for the philanthropic undertakings of donors and, in this capacity, our voice is increasingly that of a facilitator and catalyst."

Which was only fitting, given that McNally played a key role in the creation of the Success By 6 program in Edmonton. Success By 6 became an important marker for ECF. Not only was it the new director's first major initiative, it was also a collaborative effort with the United Way, both school districts, Alberta Health Services and many other community agencies. "I always thought charitable organizations in the community could work more closely together," McNally says. "I've always had a passion for kids going a long way back and belief that kids with the proper start in life are less likely to be involved in criminal activity, are more likely to be healthy, are more likely to be contributing members of society." He had some discussions with Martin Garber-Conrad and others, including Anne Smith of the United Way, and from these discussions developed the idea for Success By 6. McNally served as the first chair, though the program was run under the umbrella of the United Way. McNally is quick to point out that it was, of course, not just about ECF. But ECF was central to the program's development both financially, technically

and philosophically. Collaboration continued to be an emerging theme as ECF matured.

Of course, the standard granting activities of ECF continued to thrive and new funds, a key source of vitality and growth for ECF, were added to the existing portfolio. One fund that provides an insight into how Edmontonians were now viewing ECF was the creation of the Ranald and Vera Shean Scholarship Fund for music and teaching. The fund was set up to host a biennial music competition, alternating between violin and piano, in conjunction with the Kiwanis Music Festival. When they set the fund up, the Sheans said, “We believe in promoting and supporting culture, and we feel that our Fund will help our community and our young people. This is a small start to where we’d like to see it go. If others contribute, it will continue to grow with time. Even a small start is a start.”

Their initial contribution was \$60,000. That has since led to many great things, including what is now the Shean Competition for Strings and Piano, which is open to Canadian amateur musicians between the ages of 15 and 28 currently studying at home or abroad, or to non-residents who have been studying in Canada for a minimum of two academic years. The program today notes that “six semi-finalists are chosen from the submitted discs. The winner of the Competition may be invited to perform with the Edmonton Symphony Orchestra at a later date. Strings and piano are featured in alternative years. Ranald Shean excelled in both music and sports and was a Master Music Teacher. Vera Shean was an equally gifted violinist and pianist. Ranald was concertmaster and conductor of the Edmonton Symphony Orchestra. In addition to playing violin in the Symphony, Vera performed in recital and as an accompanist for the CBC. Their passion was teaching. Their dream for young musicians to experience the same passion they had for music lives on in The Shean Competition.” What is now a major international competition with a scholarship component came into being only through the fund the Sheans started with ECF in 1995. It’s a beautiful example of how a legacy can grow far beyond what we perhaps dreamed it would.

► As ECF settled into what might be called its stable growth phase, it was time for some changes. One of those changes was designing a

*Kathy Hawkesworth,
ECF's Director of
Donor Services.*



new logo. In 1996, ECF worked with Wei Yew of Studio 3 to arrive at a logo which combines the three elements of Donor, Foundation and Recipient into an expressive depiction of the letter E (Edmonton). Its free-flowing form evokes Choice and Freedom—the choice donors enjoy when they use ECF to give back to our community and the freedom offered to the community through funding organizations that serve our citizens.

The next two years represented a period of fascinating development for ECF, not least in financial terms. The asset base jumped from just over \$41 million at the end of 1995 to \$71 million by the end of 1997, a rise fuelled by strong investment returns as well as new bequests and donations. It had only been seven years earlier that ECF began with \$15 million in total assets, but in 1996 disbursements exceeded \$2 million for the first time. That year also marked another transition, in that the organization had outgrown its office space and moved premises one floor up in the Royal Bank Building, doubling its footprint in the process. “We finally had a board room,” laughs McNally. “It was big time.”

Another major program development for ECF was Willpower Wills Week, which officially began in 1995 but ran in earnest in 1996. This project was unlike anything else in Edmonton at the time. Essentially, ECF offered Edmontonians free presentations on estate planning. ECF provided information about how charitable giving could extend beyond one's lifetime, but there was no prerequisite that those in attendance had to use or even consider using ECF in the future. Willpower Wills Week was a major success and remains so to this day. It allowed ECF to work with professional estate advisors and planners, and increased its name recognition in the community significantly. It was also how Kathy Hawkesworth first began to work closely with ECF as a volunteer before eventually joining the Foundation. She decided then that one day she would work with ECF (we only had to wait a few more years for this happy circumstance to arrive).

This was not the only innovative program in Edmonton to feature future ECF staff. E4C opened Kids in the Hall Bistro, a café in City Hall where youth at risk acted as the staffing team. The program was partially funded by ECF and was run by the Edmonton City Centre Church Corporation, with Martin Garber-Conrad at the helm. Programs that merged a strong social enterprise component with viable businesses was one of Garber-Conrad's passions. When he eventually joined ECF, that impulse drove one of the more innovative programs of ECF's history, the Social Enterprise Fund.

The late 1990s was a time of creativity and excitement at ECF. John and Barbara Poole stepped in to direct the creation of the Edmonton Artists Trust Fund (EATF) in 1997. Long believers in the power of Edmonton's creative class, the Pooles believed strongly that not only did Edmonton create talented artists, but that those artists needed encouragement to stay in Edmonton. For that to happen, there had to be a way to help artists live here and thrive in their practice. The EATF was created to provide mid-career artists with grants to help support their livelihoods, so long as they were living in Edmonton at the time. The EATF has now been running for over two decades (and benefits from the oversight of the Edmonton Arts Council), and there is no doubt it has helped stimulate Edmonton's cultural sector—today, we have a strong writing community, world-class visual arts production, one of the country's strongest local theatre communities, and vibrant

film and dance scenes. The iconic Brian Webb was once quoted as saying that living and working as a dancer in Edmonton would have been impossible without the support of the Pooles and ECF.

Sadly, this was also a period of loss. Tevie Miller, the tenacious visionary who had done so much to bring the ECF concept to light in the early 1970s, passed away in 1996. And in 1997, we lost Francis Winspear, the man who had transferred the management of his foundation to ECF in 1992, thus creating an outline for fund-management success that has been followed ever since.

In 1998, ECF hired Chris Smith as the first Director of Programs and Elaine Hoy as the first Director of Finance. It was Smith who promoted what might have seemed like a small change at the time, but which would have an enormous effect, namely, the removal (in 1999) of the \$30,000 grant cap that had been in place since inception. Removing the cap allowed ECF to make a bigger impact in the community when and where it saw the need. This fit into both the original ethos of the foundation—in that the initial 50% discretionary donations were meant to allow for impact granting—and the big idea approach Doug McNally brought to the job. Smith left after a relatively short stay at ECF to take up a similar position at the Muttart Foundation, but his ideas continued to resonate. In 1998, ECF distributed its first three proactive grants—grants in which ECF staff themselves identified the need in the community and shepherded the grant application process. These were the Side Door Project (helping street youth find stable living environments), Healthy Families (providing home visitation for overburdened families), and Community Conferencing (which assisted young offenders and their families). “That decision was about maximizing impact,” says McNally. “We still wanted to be very thoughtful about the grants we were making, and we knew we might make less with the cap removed, but rather than trying to deliver a bit of money to a large number of charitable organizations, let’s deliver more money to fewer, but do it better.”

This was also the year in which planning began for the Our Children’s Millennium Fund. The Community Foundations of Canada had put out the request to its member foundations to create significant new programming around the millennium, and ECF decided that at-risk children would be its focus. The word “our” was to be part of every

The Our Children's Millennium Fund helps children succeed in school and in life by investing in the very beginning of their development, the time that most influences their entire life, from conception to the age of six.



project, as well as the word “millennium,” so as to galvanize public awareness around the campaign. For ECF, having chosen at-risk children as the focus, the title “Our Children’s Millennium Fund” seemed like a natural fit. Doug McNally recalls that it was one of the few fundraising campaigns ECF has ever done, and it raised over \$5 million.

The late 1990s was such a successful phase for the growth of ECF (the asset base leapt markedly in 1998 and 1999, to sit at \$92 million) that Doug McNally recalls waking up to the realization that he was leading an organization that was no longer a scrappy new kid on the block in the city’s charitable sector, but rather one of the country’s strongest foundations and a major feature of its philanthropic landscape.

“It’s not like there was an a-ha moment,” he says. “It was more of a slow understanding. We had good investment years. The number of new funds being started was rising every year. We were hiring more staff. We were fortunate to hire Joan Laurie to take the lead on

communications and planned giving. She helped us get much more professional with the newsletter and the annual report and all our publications. We moved to larger offices, which meant a lot because we then had an actual board room. But I remember we used to have these meetings every Monday morning, where we'd all exchange information about what we were up to for the coming week and how we might support one another. And it was at one of those meetings, probably in 1997 or 1998, when we'd reached about \$70 million in assets—so, double from when I started—that I said to people, 'Hey, this is a significant organization. We have these assets, let's really think about what we're doing. And if we can do things better, this is the point, now, to start doing it better.'"

It was a symbolic time. ECF was celebrating the ten-year anniversary of its rebirth in 1999 on the doorstep of the millennium, and had made huge strides in becoming more proactive in the community (with Success By 6, Willpower Wills Week, Our Children's Millennium Fund, Leadership Edmonton). It had by that point disbursed over \$20 million, fully \$5 million dollars more than had been donated to start the Foundation. In 1999 alone, there were 211 grant recipients, and the annual reports did not have enough room to name all the grantees.

That was also the year one of the founding board members, Ron Odynski, stepped off the board. In his farewell note, he wrote, "It's my hope that the Foundation will use its growing maturity to take the risks necessary to respond to our community's investment opportunities, and that we will have the faith to support those risks, even though some may fail."

These were prescient words, because as the new millennium dawned, ECF increasingly began to forge ahead along the path that Odynski, and John Slatter before him, had envisioned for ECF—to be conservative in protecting the investments Edmontonians had made to the organization, but to be fearless in using the fruits of those investments to allow our city to grow and dream and heal and create. It had been an impressive first decade of operations. But this was merely a prologue for the ingenuity and inspiration that was to come, both from within ECF and through the manner in which Edmontonians continued to find new ways to contribute.

► The first year of the new millennium witnessed ECF make the largest grant in its history to date. The \$340,000 grant to support literacy mentoring through Big Brothers Big Sisters was matched by an anonymous donor. This meant a total grant of \$680,000, which surpassed not just every grant ECF had disbursed to that point by a wide margin, but in fact came close to matching the entire disbursement amount of some of ECF's first years. It was an astonishing moment, and signalled that ECF had confidence in itself and from the community. It spoke volumes about ECF's ambition and capacity.

By this time, John Mitchell had taken over as President, and he and Doug McNally, along with the board, felt the time was right to create a new vision for ECF, which had now passed \$100 million in assets. In their joint report for 2000, McNally and Mitchell wrote that ECF now had to focus on three primary visions for its future: to be trusted by donors as the first choice to create endowments; to be recognized by charities as the primary source for grants that meet community needs, enrich people's lives and build an enduring legacy of positive change; and to be acknowledged by community leaders as the right place for innovative and prudent investments in Edmonton's future.

As part of the symbolism of this new vision, the Foundation commissioned a sculpture from local artist Catherine Burgess. Entitled *Return*, and installed (in June of 2001) on Rice Howard Way south of Jasper Avenue, the sculpture features three interdependent columns spiralling together to represent the three pillars of what ECF stands for—the donors, the beneficiaries and ECF to bring the two together. The three pillars of the sculpture support and enhance one another, as do the three factors that make our community better.

It may well be the symbolism of these elements working in unison to achieve great things that Eldon and Ann Foote had in mind when they started their Fund in 2000. Their story, and what it eventually led to, is almost movie material. Eldon Foote was born in Hanna, Alberta, in 1924 and studied law at the University of Alberta, eventually working as a lawyer in Edmonton. Foote was a driven yet idiosyncratic man. Dissatisfied with the standard lawyer's career arc, he upped and left, settling in Australia, at which point he embarked on a business career selling a line of cleaning products throughout the Asia Pacific region.



When John Mitchell became ECF's Board Chair, the Foundation's assets had surpassed \$100 million.



Big Brother Big Sisters (BGCBigs) has received many grants over the years, supporting programs that empower youth and ignite potential.

ECF commissioned Return by Catherine Burgess in 2001 to represent the three pillars of what the Foundation stands for: the donors, the beneficiaries and ECF to bring the two together.



Foote and his third wife, Anne, an Australian, eventually settled on remote Norfolk Island, about halfway between Australia and New Zealand. However, Foote remained fond of Edmonton, as well as of the University of Alberta. In addition to his gift to ECF, he subsidized the restoration of Foote Field at the University of Alberta. David Bentley, a former managing partner of Deloitte, and Foote's long-time friend and business advisor, said that he was "a wealthy man with an interesting philosophy." One of those philosophies, said Bentley, was that Foote believed "his wealth was held in trust for the benefit of the public in general."

Doug McNally recalls Eldon and Anne Foote's gifts to ECF. Their first gift, of \$5 million, was not anonymous, but there were many subsequent gifts which were. It's here that McNally brings us back, again, to the influence of John Slatter on ECF. "It was John Slatter who knew David Bentley well," he says, "and of course Eldon knew and respected and admired both men. But Slatter would certainly have been telling Bentley that if Eldon wanted to give money to any causes or charities, that ECF was the way to do it. Just think about John Slatter in terms of his reach with the people he knew and who respected him. David Bentley would have had a number of conversations with Slatter about ECF, and so he felt comfortable giving Eldon that advice. I remember meeting once with Eldon and David in my office and chatting about various things—this would have been maybe sometime between 2001 and 2003—and it was David who said to Eldon, 'You know, you have an investment maturing very shortly, and have you thought about giving it to the Community Foundation?' Eldon nodded his head and said, 'Yes, that's probably a good idea.' And nothing more was said at that. A couple weeks later I got a handwritten fax—handwritten—and it had a number on it, the amount of the donation from Eldon, and it had a decimal point in it, and I thought, I can't be reading this correctly."

It turned out to be a donation in the region of \$20 million US and was the largest cash donation to a community foundation in Canada to that date. Foote insisted it remain anonymous. There were more gifts before Foote's passing in 2004, at age 74, and he always insisted on anonymity. In his wills, Foote stipulated that the vast majority of his wealth be donated to two charities—the Lord Mayor's Charitable

► *Clockwise from top left: Thanks to the Foote fund, ECF was able to expand its support for organizations working in Edmonton's inner city, including iHuman.*

Young Edmonton Grants program provides local youth with funding to turn their ideas into reality.

Staff and volunteers at the Edmonton Area Land Trust plant native species at Hilltop House. The team rescued various plants from a highway expansion project happening north of Edmonton in 2016.

Foundation in Australia and ECF. At the time his donation to ECF was processed, it constituted approximately 1/3 of its entire asset base. Given the complexity of his estates and family affairs, the wills took many years to sort out, but in 2017 it was revealed that the Footes had gifted a total of \$164 million to ECF, which through time, has accrued to close to \$210 million. It is the largest charitable gift to a community foundation in Canadian history.

It's a staggering number to take in, but even more staggering is that nearly \$43 million has been disbursed through the Foote Fund. That's almost three times the amount that ECF started with. The sheer variety and community value of the programs the Foote Fund has supported is overwhelming. The Edmonton and Area Land Trust, for instance (which was incorporated in 2007 and began operations in 2008), would not have been able to preserve even close to the same amount of ecologically sensitive land in and around Edmonton without support from the Foote Fund. "The Eldon & Anne Foote Fund have meant everything to the Edmonton and Area Land Trust, enabling the purchase of our first several properties," says Pam Wight, EALT's Executive Director. These include areas such as Golden Ranches, Hicks, Ministik, Pipestone Creek and Bunchberry Meadows. The stewardship of these and other properties allow EALT to preserve vital wetlands and natural areas so that our water, air and wildlife have the ability to exist in harmony.

The Foote Fund also allowed ECF to expand and deepen inner-city programs like iHuman and CEASE (Centre to End All Sexual Exploitation) and YEG (Young Edmonton Grants), and to support women trying to escape the sex trade and young Edmontonians with visions for the future of their community. Such programs would not be possible without the Foote Fund. The message the Footes left is clear: "We believe in Edmonton and in the ECF, and we want to help."

► The story of ECF is, of course, the story of people—those who donate, those who turn grants into programs and services, and those who help the two come together. Among the last-named was Kathy Hawkesworth, who joined the Foundation as Director of Donor Services in 2001. She'd been working as an accountant at Ernst and Young, and one of her assignments was to sit in on the ECF audit.





▲ Recipients of the Belcourt Brosseau Métis Awards celebrate at the 2019 BBMA gala and sash ceremony.

▲ Founders of the Belcourt Brosseau Métis Awards, Herb Belcourt, Orval Belcourt and George Brosseau.

Shortly after Willpower Wills Week was introduced, she became more involved as a volunteer. She had always loved the notion of planned giving and fund development for community benefit, and she knew ECF was a place she wanted to work. “I don’t recall exactly when the bug hit,” she laughs, “but I was a volunteer at ECF before working here and I always knew it was where I wanted to end up.”

Hawkesworth came to ECF at an exciting time. Doug McNally was just about to start his second five-year term as CEO, and ECF’s asset base was by then worth well over \$100 million. There was a strong board in place and the number of grantees mushroomed every year. Individual and family funds, whether large or small, are the oxygen of ECF, Martin Garber-Conrad once said, and that’s certainly how Kathy Hawkesworth saw, and continues to see, things. She calls ECF “an honourable place to be.”

“It’s about hearing people’s stories,” she says. “Some of them are heartbreaking, some of them are joyful, some are strategic and others are trying to figure out their place. And we can help with that. And we love it when people trust us enough to let our board make decisions in terms of knowing what the community will need fifty years from now, though they often do it through a frame, as in, yes, make that decision, but in the arts or education or whatever. ECF occupies a unique niche in our community, which is forever money, this sustainable ongoing support for whatever causes or areas are of importance to a donor.”

Herb Belcourt, his cousin Orval Belcourt, and their friend Georges Brosseau had no doubt about what causes were important to them. It was in 1971 that the three men founded the Canative Housing Corporation, a non-profit organization that offered affordable housing for Métis people in Alberta, primarily in Calgary and Edmonton. Between the 1971 and 2005, they bought 179 homes in Edmonton and 49 in Calgary and rented them back to Métis people at affordable rates. They also provided affordable day care and food co-ops. However, they also realized that housing wasn’t enough and that education was vital to success for Alberta’s Métis, and so the three started the Belcourt Brosseau Métis Awards, an endowment to help Métis students of Alberta to continue their education. Their initial gift helped establish a fund that is now worth over \$13 million. Well over \$7 million has been disbursed via 1,500 awards to over 1,000 Métis across Alberta to help



In 2012 the laneway behind ECF's offices was renamed Slatter Way in honour of John Slatter, the man who played an instrumental role in bringing the community together to create ECF in 1989.

them continue their educations. “It’s been far more successful than I ever thought it would be,” says George Brosseau. “And I just don’t see any end in sight for it. And the credibility we have with the sponsors and the community means that we are only going to be able to give more and more to the students.”

“Sometimes I get tears in my eyes when these people come to tell you their stories, what they went through,” Herb Belcourt said in a video about the BVMAs ten years after it was founded. Belcourt passed away in 2017, but he knew by then how significant the impact of the program had been. More importantly, he also knew that because the fund was endowed and run by ECF, it would only get stronger over time. “The world is in their hands once they have an education,”

said Belcourt. “And in the future, Canada will be proud of our native people.”

Despite the excitement around the new millennium, there was one sombre moment for ECF in 2001—the passing of John Slatter. Nearly every thread of ECF’s rebirth leads back to John Slatter. Many of the principles he lived and worked by are now threaded seamlessly into ECF’s DNA, and it was only fitting that his memory was honoured in 2012 when the lane that leads to ECF’s offices was renamed Slatter Way. The name is a bit misleading, as it does not stand exactly, or at least only, for what we might think.

“It’s fascinating,” says his son, Frans Slatter, “because Slatter Way was actually named that not necessarily because it’s a “Way” as in a roadway, but because it speaks to the Slatter Way, meaning his way of doing things. He set a culture around ECF right from the start, a kind of philosophy about how ECF should be run.”

That philosophy was centred around high ethical standards and an ability to match deep wisdom with an attention to detail. “He wasn’t just a man of the moment,” says Frans Slatter. “He could see the future, he could see how decisions made today would unfold tomorrow. He could always see beyond today’s problem and see the bigger picture.”

As does ECF. Which makes it only natural that it sits on Slatter Way.

► Although these were exciting times for ECF, the financial reality was not always quite so rosy. The Foote Fund donation helped gloss over the fact that the first years of the new millennium were sub-par investment years. “It has not been an easy year for the investment community, and there is no denying that the Foundation has been impacted,” wrote Doug McNally and Board Chair John Mitchell in 2001. “It is in these times, however, that the true believers in community and the strength of the Edmonton Community Foundation come to the fore.”

Despite these challenges, ECF still managed to disburse nearly \$13 million across those two years. Edmontonians continued to exhibit a sense of inventiveness and passion for their community that belied the delicate economic climate. Board member Zaheer Lakhani and his wife Salma celebrated the 25th anniversary of arriving in Edmonton from Uganda by creating the Lakhani Family Fund. The Lakhanis chose to



◀ *Scott Graham, ECF's former Director of Community Grants, with guests at his retirement party.*

▼ *Zaheer Lakhani and his wife Salma celebrated the 25th anniversary of arriving in Edmonton from Uganda by creating the Lakhani Family Fund.*



create a fund designed to support creators and performers because they “add enormously to all our lives.”

ECF’s financial situation turned around in 2003, when 43 new funds were created. There was also a jump in 2004, when ECF took over fully managing the Winspear Fund, meaning it not only looked after the investment and management side, but the disbursement side as well. This was an indication of ECF’s stability and the trust it had earned in the community. Doug McNally continued his streak of hiring talented people when he brought on Scott Graham as a Programs Officer. Graham would also go on to work closely with the Stollery Charitable Foundation while also acting as ECF’s Director of Community Grants.

More staff meant less room in the Royal Bank Building offices. In 2004, Doug McNally began talking to local architect Gene Dub about a property Dub owned, and its potential suitability for an organization like ECF. That property was Hilltop House, ECF’s current home.

More notable than the space ECF was occupying, however, was the pace at which the number of grant recipients continued to grow. In 2004, ECF distributed grants to 432 organizations, an insight into just how big an impact ECF was having on the community. One of those grant recipients epitomized just how vital ECF’s support was to the success of an intensely specialized program which then branched out to impact an entire community. The Nina Haggerty Centre for the Arts, or simply “The Nina” as it’s now known, is an arts school for persons with developmental disabilities that was founded in 2003. The inspiration for the Centre, and its namesake, Nina Haggerty, was born in rural Alberta before World War I. She contracted polio, as did her older sister, Rita. Their father died during the war and their stepfather was abusive and violent, which led their mother to place them in Michener Centre in Red Deer, thinking they’d be safer there. It was there they remained for half a century, until they were able to move into the community together as sisters, through the support of the SKILLS Society. It was during these years in the community that it was discovered Nina had an artistic gift that had lain dormant for fifty years. It unlocked her potential and she and her sister lived out their lives happily in the community.

It was Nina’s artistic gift that led members of SKILLS to form a new art school in her name, using a tiny \$5,000 grant to explore the idea. It



ECF moved its offices into the historic Hilltop House (9910 103 St.) in 2005. The mansion was built in 1913 by John C. McDougall.

was with the help of ECF (and the Stollery Foundation) that the Nina was able to open in 2004 in a small rented space north of downtown Edmonton. In 2009, again with the help of ECF, it moved into a brand new building on Alberta Avenue as part of the overall revitalization of the area. The Nina is now celebrating 16 years of helping persons with developmental disabilities realize their potential through creativity. The Nina also brings the inspiring secondary benefit of integrating such a program directly into its local community. The Nina is central to Alberta Avenue's unique character, whether or not a person has anything to do with the visual arts or the world of developmental disability. ECF has been supporting it from moment it was merely an idea, yet it's as good an example as any of how a community foundation is about the community before it is about the foundation.

Doug McNally's second five-year contract was due to expire on January 31, 2005. He had always felt that a decade in the role would about right for him, and he'd let the Board know well in advance

that he would not be requesting a third term. “It was without a doubt the best ten working years of my life,” he says. “A phenomenal organization. I met wonderful individuals. I had an opportunity to help build ECF. It was a great time and I treasure the experience.”

ECF treasured what he brought to the job. When Doug McNally took the helm in 1995, the asset base was \$35 million. In 2004, the last full year before he left, it was over \$163.9 million. In 1995, ECF disbursed \$1.7 million to 195 organizations. In 2004, it distributed \$7 million to 432 recipients. In 1995, 14 new funds were created. In 2004, that number was 31. John Slatter, Bob Stollery, Ron Odynski and the rest of the selection committee believed, late in 1994, that Doug McNally would lead ECF with stability, integrity and purpose. They were right.

CHAPTER 5



2005–2019

IMAGINATIONS UNBOUND

▲ *Former Poet Laureate, Nasra Adem, delivers a poetry reading at Foundation's 2017 Annual Meeting. Adem was also a contributing writer to ECF's High Level Lit Salon series presented by LitFest and Eighteen Bridges Magazine.*

◀ *Distinguished former senator and local music legend Tommy Banks, lends a hand to fellow artists through the Tommy Banks Performing Arts fund at ECF.*

BY 2004, ECF was a substantially larger component of the Edmonton philanthropic scene than it had been a decade earlier. Doug McNally had not only done a fine job in running ECF on a day-to-day basis, but he significantly raised its visibility in the wider community. In part due to McNally's efforts, but also through his astute hirings and the ever-growing ingenuity and passion of Edmontonians contributing to ECF, the Foundation's inherent standing in the community meant that a more intensive process would be needed to find the right person to succeed McNally, and that there would be a lot more interest in the job.

It was also not insignificant that there had been a changing of the guard in City Hall in the fall of 2004, when Stephen Mandel won the first of what would be three consecutive terms as Mayor. Mandel ran

on a platform of high energy, straight talk, transparency and unabashed enthusiasm for what he saw as Edmonton's untapped potential. He made every Edmontonian feel that great things were coming. And for the most part he was right, in that the city made strides during his decade in office, particularly in major infrastructure areas. The downtown core was revitalized. The new arena got built. LRT construction continued apace. No city-building project is perfect, but Mandel's time in office was both an engine and a symbol of Edmonton's growing confidence and willingness to take risks.

As Mandel assumed office in the late fall of 2004 (and as Ralph Klein's run was coming to an end in the provincial legislature), the selection committee got to work. After an extensive search process, they found the right candidate, someone deeply familiar with ECF (having sat on the board in the 1990s), who was held in high regard by the charitable and philanthropic communities (having run E4C for 18 years), and who understood that profound ideas are sometimes the simplest to understand (having at-risk youth staff Kids in the Hall Bistro). It was, of course, Martin Garber-Conrad. When he started his tenure as CEO on February 1, 2005, there were numerous To Do items on his plate, but as it turned out, one of the first was to move ECF into new premises.

► John C. McDougall, a pioneer of business and politics in Edmonton's post-frontier days, built Hilltop House in 1912, overlooking the steep hill that is now 103rd Street. The land the building sits on was purchased by his father, former MLA John A. McDougall, in 1891 from the Hudson's Bay Company. After John C. McDougall sold the building, it was put to various uses for many decades, including as a home for abused women, a drug treatment centre and then office space. It was owned by the Province for many years before local architect Gene Dub bought the building. What followed was a series of complicated negotiations that resulted in ECF moving into Hilltop House. McNally and Garber-Conrad had first suggested to Dub that it could work as a joint space for ECF and E4C, but once Garber-Conrad took over at ECF, he found that Dub was amenable to a lease arrangement for ECF alone. Garber-Conrad recalls that the timing of the entire episode was somewhat

Martin Garber-Conrad, ECF's CEO.



The McDougall family at Hilltop House.

frantic, only because it was all happening at precisely the same time he was to be starting his new job.

“I started at ECF,” Garber-Conrad recalls. “And I think even at the very first board meeting, at the Royal Bank Building office, the board brought it up and said, “If you don’t want to do this crazy Hilltop House idea you don’t have to.” And I said, “No! I want to do this crazy Hilltop House idea, and I think I can make it work.” Garber-Conrad spoke to Dub, who offered ECF an equitable lease deal for a number of years with an option to buy at a later date. “It was very generous of him,” says Garber-Conrad. Roughly two years later, ECF decided to purchase the building. “But it was great to lease it first,” says Garber-Conrad. “It allowed us to check it out, to move in, to see if it worked for us. Which it obviously did.”

Garber-Conrad still laughs at the frenzy of his transition. He started in early April and by July they had moved to Hilltop House. Luckily, the building was in excellent condition and required very little work, though there were a few surprising and pleasant revelations. “I remember,” says Garber-Conrad, “that we took out a couple of false ceilings and rolled up the ugly carpet and found beautiful floors underneath and all those architectural details in the living room under the dropped ceiling. It was beautiful.”

Once Garber-Conrad and ECF had settled into their new home, they could get back to work. Doug McNally had effectively shepherded ECF from being a small but respected community foundation to being a significant participant not just on the Edmonton charitable sector scene, but nationally and even internationally. The expectations for expansion were high. Garber-Conrad was well-known in Edmonton for his insight into social enterprise and the power of impact investing, as well as for his originality and innovation. In hiring him, the Board was making a bold statement of intent: ECF was poised to do exciting things on a whole different scale.

Garber-Conrad understood. In his application, he had written that the opportunity to think big and to think differently was the primary reason he wanted the job. “I said something to the effect that it’s good granting that inspires donors,” he says. “I’m not a salesman kind of fundraiser, but I’d demonstrated at E4C that you get support because you’re doing good things in the community. And we’re a granting

foundation, at ECF, and so the bigger and better and more significant our grants are, that's what will inspire people. The fact that we can get things done in the community, that we could be part of important things happening in the community, that we can get results. That's what I wanted to be part of and help make happen."

He didn't waste time. Not long after settling into Hilltop House, it was time to celebrate the tenth anniversary of Willpower Wills Week, a program that continues to demonstrate ECF's inherent ability and willingness to benefit individuals and the community whether or not a direct benefit accrues to ECF in the form of a donation. That isn't the point, says Kathy Hawkesworth. "We've been very fortunate to have had the leadership we've had over the years," she says. "And that's helped us build that trust within the charity sector itself, that we are not here as a competitor. We're here to be a unique part of what makes everyone successful, as individuals, as organizations. That whole partnership with charities has grown over the years. We've grown organically to take on additional or different roles in the community. Yes, we're a granter, but we're also a convener."

The fact that 41 new funds were created in 2005 certainly speaks to the point that ECF was not just a granter but a facilitator. And the amounts now being disbursed in grants on an annual basis were a strong reflection of ECF's ever-increasing role in the community. It's worth pointing out that in the first 15 full years of its existence, the annualized return on investment for ECF was just a shade under ten percent which represents a responsible stewardship of the public trust. Yes, ECF was fortunate to begin operations through the generosity of three philanthropic families, but since that time the fund had not only grown by \$210 million, it had also disbursed close to \$80 million. Much of this success has been due to what is an essential element of Edmonton's inherent character: the collective humility of its citizens. Even Martin Garber-Conrad feels this when he talks about what has made ECF so successful, namely, that people from all levels and layers of society pitch in without anyone putting on airs.

"I think it has a lot to do with Edmonton's humble roots," says Garber-Conrad. "There are still plenty of people here who are only a generation or two off the farm and there's still almost a genetic memory of the Depression. Wealth came more slowly to Edmonton.

► *ECF helped fund Edmonton Public Library's first Writer-in-Exile in 2007. Jalal Barzanji, an ethnic Kurd forced from his home because of his support for human rights, became a leader, mentor and advocate for freedom of expression, literacy and multiculturalism in Edmonton.*

► *To celebrate its 50th anniversary, the Edmonton Jazz Society received a grant to help transcribe and perform Dal Hillary's Van Gogh Suite, which had never been put down on paper before.*

I think it has some correlation to the characterization of Edmonton as a blue-collar city and some of those blue-collar folks managed to start small companies that made it big, but that people remembered it wasn't always like that.”

Whatever the cause and effect, there can be no doubt that it was, and remains, a collection of successful but mostly quiet people who had set the stage for a tremendous growth in capacity at ECF. A capacity that, by the time Martin Garber-Conrad had finished his first full year on the job, gave him and his team the confidence to start thinking in radically different ways about what a community foundation was for and what it was capable of doing.

► Both John Poole and Bob Stollery passed away within two months of one another in 2007. It was a sad time for Edmonton and ECF. On his death, Martin Garber-Conrad said of John Poole that “his genius was to combine leadership with vision. He was very much in touch with needs and issues in our community. He had a broad and clear understanding about the challenges and possibilities for Edmonton's future. And then, he took the next step—leadership. He took action with incredible generosity and strength of purpose.”

Of Bob Stollery, Martin Garber-Conrad said: “To say that Bob Stollery was generous, or a man of vision, or a leader, is not enough. Bob Stollery was a builder—he made things happen. To realize his visions, Bob brought significant resources to the table, a strong will, and his own ‘personal capital’ to make good things happen for our community and the people in it.”

It has been noted that each of the original donors brought a special characteristic to the work of forming ECF—the Poole philanthropic passion for the community; the Stollery humility and lack of pretension and the Slatter organizational acumen. After their passing, it was clear how deeply these traits had been woven into the fabric of ECF: Never fail to display a philanthropic passion. Always put the community first. Exhibit grace towards others, especially those less fortunate than you. Make solid and sensible financial decisions while in a position of trust.

One program that illustrates the way ECF has exemplified these characteristics through granting was Satellite House, a program run



A grant to the Mennonite Centre for Newcomers Society's Stay in School program supports new Canadians such as Dahabo and Mohamed. "This the first school I have ever attended. I love life here, it is so peaceful and I know I have a future to look forward to," said Dahabo in 2002.



by the John Howard Society. This six-bed home in north Edmonton was set up to offer services to men who'd been hospitalized or involved in the criminal justice system, and who frequently were also experiencing mental illness. The transient nature of many of their lives too often led to instability in every area of life. Staff helped the men with medication, counselling, budgeting, independent living, and job searches. Using programs tailor-made to each individual, as well as things like role-playing through stressful situations, Satellite House made a huge impact in helping these men in crisis reach for some kind of dignity and growth.

After the sadness of early 2007 with the passing of Poole and Stollery, the rest of the year was an exercise in resilience. There were many successes, including disbursing 1,249 grants for a total of \$18.2 million, as well as starting 86 new funds. Some of the more fascinating programs to receive ECF grants in 2007 included the Writer in Exile program, the Jazz Society, and the Seniors Assisted Transportation Society. Certainly one of the more consequential developments was the initiation of Foundation Directed Initiatives, a new funding approach that allowed ECF to pursue an even more proactive and long-term funding strategy. It allowed the Board and Committees to identify

organizations and projects that they felt would benefit from the stability of a longer arc of support, which meant, primarily, that staff could focus on delivering front-line services instead of worrying about making annual grant applications. This was not exactly new to ECF, as this was also the rationale behind removing the old \$30,000 cap. What is significant is that it gave a name and approach to what ECF began to see as a smarter and more effective granting process for certain organizations. Fourteen FDIS were approved in 2007, and recipients included organizations such as the Mennonite Centre for Newcomers, the Edmonton Arts Council, the Edmonton Chamber of Voluntary Organizations, and Families First. FDIS applied a formal structure to a belief in continuity.

After a strong fiscal year, the economic downturn of 2008 came as a shock, but fortunately ECF did not retreat. Quite the opposite. Despite the financial difficulties presented by the recession, 2008 would prove to be one of the most innovative years of ECF's history as ideas and programs that had been gestating for years finally came to fruition.

One of these was the Endowment Sustainability Program (ESP), which was a training and coaching program designed to help organizations build an endowment strategy suited to their individual needs and character. It involved classroom sessions that focused on skill building in key areas around donor relationships, funding opportunities, tax strategies, and communication processes. It was, and remains, a program not unlike Willpower Wills Week, in that there is the possibility but not the guarantee of a direct benefit to ECF. What is guaranteed, however, is that Edmontonians will benefit through having more options and better information.

The most visionary program development of 2008 was the introduction of the Social Enterprise Fund (SEF), an idea that had been brewing for many years. In the ten-plus years it's been running, it has taken the philanthropic essence of ECF and added a forward-thinking lending component to companies and ideas that contribute positively to the social fabric of the community.

The development of the SEF says much about our community. Jenny Kain and the community economic development (CED) team she was part of at the City of Edmonton in the mid-1990s felt Edmonton could support the mix of economic development and social enterprise. All

*Carol Watson,
Director of
Communications
2010 to 2019.*



the factors were there—the city had a long tradition of community involvement that was the product of blue-collar business, a strong post-secondary environment, and was home to the provincial government. Of course, the Klein era austerity budgets meant innovative programs without a cost-reduction payoff didn't get much traction. Then, circa 2005-06, a senior manager at the City, Carol Watson (ECF's recently-retired director of communications), heard about the idea. While she thought it was exciting and innovative, she had doubts it would make it through the City bureaucracy. "It was unusual thinking," she says, "and we had so much great research and a great plan, with smart people working on it." Reception at City Hall was mixed: Councillor Janice Melnychuk was a big supporter of the idea, but Mayor Mandel was less enthusiastic. Watson convinced Council that the City was a

good place to incubate such a program, but it would be better if it was run by an external agency. Regular meetings began to happen between the City and ECF. In the end, Carol and Martin Garber-Conrad, who had recently taken over as CEO at ECF, persuaded Council. ECF and the City signed an agreement to create the SEF on September 2, 2008. The SEF now had legal standing and money in the bank (close to \$5 million from the City, ECF, the United Way, and the Province). The long-time community worker Bob Ward was hired as CEO to oversee the SEF's opening phase. Ward was well known in the community and had a wide range of experiences on his résumé, including having worked with numerous NGOs. He'd also been involved with many humanitarian projects overseas as well as start-ups in the north, which was valuable experience in the social enterprise field.

When Ward decided to retire a few years later, ECF hired Jane Bisbee, who'd worked in arts and culture management in the Edmonton region, to replace him. It was not a smooth transition. On the day of Bob Ward's retirement party, he suffered a massive heart attack while giving his farewell speech. Efforts to revive him failed. As a small way to commemorate his contribution, his family, friends and colleagues later created the Bob Ward Social Enterprise Endowment Fund, which continues to contribute to the work of the SEF.

Jane Bisbee had to take over after that traumatic event. She found that the SEF had been operating essentially as a one-man educational program rather than as a social enterprise lending institution. "The biggest issue I had, taking over," Bisbee recalled in an article written in 2018 on the occasion of the SEF's tenth anniversary, "was simply deal flow. Bob had done a great job orienting the community to the relationship between social enterprise and community economic development. When I started, I had to kickstart all that into actual loans."

Bisbee did so by dialing back the number of workshops and accessing her long-standing relationship to the arts and culture communities to create deals. The organization had unused capital sitting in the bank, capital that needed to be put to work. "I decided to focus on that word in our name," laughed Bisbee. "Fund. I wanted to concentrate on getting money in the hands of people who could use it responsibly and to socially beneficial ends."

Bisbee knew there were plenty of top-notch organizations doing work supporting the community, and which would benefit from having access to capital. The trick was helping them break through the fog of misinformation that has so long swirled around the relationship between debt and financing.

“Jane took things a different way,” says Watson. “She knew intuitively from her background who might be ready, and those people were primarily in the arts and culture sector. So she started building a true loan portfolio right away. Her experience showed, and the SEF blossomed.”

Word of mouth replaced advertising and workshops. Partnerships came about with the U of A, as well as the Edmonton Arts Council and community leagues. As a small organization that sold apple pies and jam made from rescued fruit at a local community league, the Fruits of Sherbrooke didn’t have much in the way of collateral, but they were able to use SEF funds for the operating capital that helped them grow to the point that they now sell over 20 condiments in farmers’ markets, retail outlets and local restaurants. In 2015, with cash raised through Kickstarter, the organization launched Project Fruit Stars, which has donated over 13,000 individual snacks to upwards of 30 high-needs schools. They offer classes in preserving and transforming rescued fruit, and have grown to the point that they now need a full staff team and have created a work program for people who’ve had difficulty finding work through traditional means.

Since the SEF opened its doors a decade ago, it has processed close to 70 financing deals and has distributed approximately \$40 million. It is putting the considerable financial power of endowment to work in a broader way than simply making annual disbursements. And it is proving to be both reliable and profitable. It has had to declare a loss on just two of those 70 loans, and in some years the return on investment has outperformed the markets. Former board chair Carman McNary believes the potential of impact investing through unlocking assets may well be ECF and Garber-Conrad’s lasting legacy. “Martin activated the power of stewarded funds,” says McNary. “It’s deeply meaningful.”

Martin Garber-Conrad believes the SEF is just the start. In 2010, the Canada Task Force on Social Finance issued a call to all public and private foundations to devote at least ten percent of their assets to

impact investing by 2020. ECF made that commitment. “We realized a while ago that we had to up the ante,” says Garber-Conrad, “which is why we created a second fund alongside the SEF, under the same umbrella.”

That fund is the Alberta Social Enterprise Venture Fund. Essentially, it operates on a similar model to the SEF’s original fund, except it has no City of Edmonton dollars and it can accept donations from private individuals and other organizations wanting to invest in socially valuable projects.

“People see social enterprise as this experimental new thing,” Bisbee said in the SEF tenth anniversary article, “but it’s actually very old-fashioned. You find people you believe in, you find out how they want to help their community, and you figure out if they can operate as a business.” Bisbee and her team often laugh when they show up for work and say to one another, “How shall we use our power for good today?!”

That sentence—“How shall we use our power for good today?”—could easily define what ECF does, and calls to mind what John Slatter once said in the late 1990s: “Ethics is at the heart of everything the Foundation does.”

► One of the most notable and appealing qualities of Edmonton and the entire metro region is how community-minded it is. Being a good neighbour is not just a phrase; it’s a way of life. Richard LeBlanc found this in the Braeside community of St. Albert. In 1977 he moved into the crescent where he still lives and found John and Pauline Koroluk as his neighbours. They had lived in their house since 1958. They were older than Richard, but they all got along very well. As the Koroluks aged, Richard found himself helping John with chores around the house and yard, as a good neighbour would.

“In some ways,” says Richard today, “they were like a second mother and father to me. They were amazing people. They were generous, church-going, kind.”

Richard spent a lot of time helping John with his large garden—so much so that at one point John gave Richard a section for himself to take some of the burden off. It cemented their friendship even further. “And I learned a lot from him,” says Richard. “He was a fine gardener.

He taught me how to tie tomatoes, how to grow leeks, how to compost. And he gave me a little tree sprout one day that I planted, and now that tree reminds me of him all the time.”

Richard wanted to do something to recognize John and Pauline while they were still alive. He started an endowment in their name, with the proceeds going to the Roots of Change Foundation, a charity which helped farmers in Nicaragua with such things as drilling water wells, irrigation and buying seed for crops. “He was alive when we started it with ECF in around 2009,” says Richard, “and so he knew there’d be something that spoke to his legacy.” John passed away in 2011 at the age of 93. Pauline suffered from dementia earlier on in her life and passed away in 2017. “It’s just such a meaningful way to remember good people,” says Richard. “He was a great neighbour, a wonderful man, and he believed in me and my goals in life at the time by providing support and encouragement. In return, I wanted to do something for him to recognize how lucky I was to have him as a neighbour.”

Simple and beautiful stories such as that of the Koroluks and Richard LeBlanc reinforced the growing impact of ECF on the community. 2009 was a significant year in that it marked the 20th anniversary of the Foundation’s rebirth and commencement of formal operations. Karen Platten had taken over as Board Chair by that time and in the 2009 Annual Report, she and Martin Garber-Conrad penned a joint note in which they reflected on all that had come before. “Anniversaries give us a chance to reflect on the past and to look ahead to the future,” they wrote. “As we near the end of our 20th anniversary year, the looking back is easy. The three founding families from 1989, John and Barbara Poole, Bob and Shirley Stollery, and George and Rae Poole, are clearly and happily brought to mind, especially because Barbara and Shirley are still very much with us. What perhaps isn’t so widely known is the vision of these families—matching well their generosity. Although each family had its own particular charitable interests, they all put significant assets into a community fund so that the Foundation of the future could respond to emerging issues and urgent needs that weren’t apparent twenty years ago. The community fund has grown over the years, although the challenge remains to respond strategically and effectively to increasing needs in our community as other funding sources stagnate.”

*Karen Platten, Board
Chair from 2006 to
2010 and former
Board Member Neil
Gower circa 2007.*



They went on to note that in ECF’s first two decades of operations the trust fund had grown to \$250 million—an astonishing number by any measure. Equally remarkable was that ECF had disbursed over \$110 million to hundreds of local charities in those two decades. The work of thousands of people had immeasurably improved the lives of many Edmontonians. Platten and Garber-Conrad reminded us that over 550 named funds had been started at ECF since 1989. This represented an inspiring pattern of community contribution. What it all meant when you added up everything that had transpired over the previous two decades was that “every year of our next twenty years (even in times of financial crisis or slower growth) millions of dollars will be put to work in our community—invested in essential work in health, education, social services, arts and culture, recreation and the environment. As a result, Edmonton will be a better place than it would be otherwise—for all of us.”

If there was one theme that resonated throughout the 20th anniversary year, it was that ECF began to reach out even further into the community to broaden public awareness of its mandate and to expand the community's knowledge of the Foundation. It's a never-ending process, but it is fair to say that 2009 represented the moment when ECF began to seriously reach into the community to say, "Here we are. Here's what we do. Here's how we can help."

Hiring Carol Watson was part of initiating many of those processes. When she moved to ECF from the City of Edmonton in 2008, there was no formal Communications department at ECF despite what Watson says was an "obvious culture of innovation in every department." On arrival, she found a group of great staff who took on communication tasks as needed. "I was fortunate that Martin was willing to give me the time to find my place in the organization," says Watson. "Because, at the time, I thought I would be working with Kathy in Donor Services. But after so many years working at the City, you're always doing marketing and I think my skillset lent itself more to communications."

Between the two of them, Watson and Garber-Conrad arrived at the notion that ECF would benefit from a standalone Communications department. Watson began building it from scratch just prior to the 20th anniversary and she suggested using that event as a platform to run a speaker series around the Future of Community. Garber-Conrad and the rest of the team liked the idea of a program based on cultivating a notion of community that emanated from within ECF rather than being a series supported by ECF and run by a separate organization. It was yet another step in ECF's ongoing evolution towards being a community-shaping organization rather than a behind-the-scenes support beam. And it was the start of what soon became ECF's Communications Department, "our small but mighty team," laughs Watson.

Up to that point, the many stories of success and creativity were published in the Annual Report. After twenty years, there were simply too many to confine to the pages of a single report. It seemed to share these stories on an ongoing basis throughout the year. And so *Legacy in Action* was born in time to celebrate the 20th anniversary and as a launching pad for the Communications department. Initially published twice a year, the magazine has now become a quarterly publication.

The stories told in *Legacy in Action* over the years have been much greater in scope than the Annual Report allowed. It is published with the professional guidance of Odvod Media and distributed to all those with an ECF connection and as an insert in *Avenue Magazine*. Together, Odvod and ECF have made a conscious effort to hire many of Edmonton's creative writers, photographers and illustrators, which gives the magazine, and Edmontonians, the win-win of hearing of the myriad ways in which ECF has helped citizens improve their community through the talents of local creators.

The stories contained in the first few issues of *Legacy in Action* showed just how fascinating and insightful longer-form treatments could be and, therefore, how much more connected people feel to what results from these donations and grants. These stories are almost always about making Edmonton a better, safer, more creative, more caring city. Watson and her team rely on their colleagues in grants and donor services to alert them to such stories, at which point they'll discuss it as a group. "Quite often," says Watson, "these are amazing stories of giving, but we always have to remember that donors don't always want their stories told. Many people are simply quite private and just want to help their community without a fuss being made. Others are more willing to have their stories told."

It's about building relationships, says Watson. Making sure that all people, grantees and donors and service recipients, have a great experience through ECF. "We're so grateful to our donors," adds Watson. "It's their gifts that have built this organization. We are really grateful and are always looking at ways to thank them in the way they feel best about, so that we continue those relationships. Of course, we do want to reach out in different ways but the most important thing we do is make sure our donors feel recognized in the right way and that they understand that we are nothing without them."

The first issue of *Legacy in Action* ran features on the Edmonton Area Land Trust, the Edmonton Artists' Trust Fund, the Social Enterprise Fund, Foundation Directed Initiatives, the Return sculpture, the Jellinek Society Recovery House and Donor Advised Funds. It offered insights into newly created funds such as those for the Edmonton Folk Music Festival and the Edmonton Refugees and Emerging Communities. If not for *Legacy in Action*, these stories of innovation

Carol Watson, ECF's former Director of Communications and Scott Graham, ECF's former Director of Community Grants.



would have been buried in an Annual Report. Instead, they were shared widely, through the voices of Edmonton's creators.

When you look at the first few issues of *Legacy in Action*, you can trace the overarching narrative ECF was hoping to share with Edmontonians, though perhaps Watson and crew were doing it subconsciously. *We are a conduit for all of you*, was the through-line.

No matter whether your passion is poverty reduction, the environment, the arts, working with persons with disabilities, using the world of business to make a difference, music...ECF is an instrument we can all use to maximize our impact.

This narrative has only increased in scope and impact, as in 2011 with the introduction of the Young Edmonton Grants. This program was based on an idea that evolved from conversations at ECF and in the community that young Edmontonians, meaning anyone 25 and younger, were full of passion and ideas but that their demographic had been consistently unable to secure funding for projects due to their relatively light résumés. Barbara Poole and the Poole family provided the impetus for this project, but many others have since expanded this fund, including donations from the Jones Eidem, Douglas and Jane Wilson, and Eldon and Anne Foote Funds. Scott Graham created an initial advisory board comprised solely of younger Edmontonians, meaning peers would make the granting decisions. Grants of up to \$3,000 were made available to applicants to pursue projects from making films about the teen youth immigrant experience to staging plays to creating support networks in schools. The range of ideas was (and remains) impressive and ambitious, and also reassuring, in that older generations of Edmontonians can have considerable faith in the talent and dedication of the next generation.

One of the unreported benefits of the YEG program, Scott Graham often said, was how impressive the juries were. Many of the youths on the juries were as young as 13 (and no older than 22), and yet they assessed every application with rigour and compassion. In the years Graham oversaw the program, he has remarked, he never felt an improper grant was being awarded. Just a few of the hundreds of approved projects include a promotional video for iHuman's Youth Speak Edmonton (a group of youths who provide their peers with a positive, confidential space to talk about mental health and emotional issues), a Wake-A-Thon for juvenile diabetes run by Avalon Junior High School, a tablet computer and software to Jasper Place High School to upgrade their student-run Global Cafe, a two-day open-entry arts event called Tabula Rasa, an Indigenous storytelling event called Stories on the Hills, and FEMPower: a Diverse Young Women's Empowerment Conference.

It was poignant that a program as innovative as YEG was introduced in the same year that Shirley Stollery passed away, given how instrumental Shirley and her husband Bob had been through decades of discreetly working to improve the lives of youth in Edmonton. It might be hard to imagine, given how humble and self-effacing Bob Stollery was, but Shirley Stollery was probably the quieter of the pair. They were famously unpretentious, so much so that Scott Graham (Doug Stollery's husband) recalls Shirley Stollery once making a reference to "the new house."

What new house? Graham wondered. He hadn't heard that Bob and Shirley were moving. It turned out she was only referring to the house they were currently living in, a comfortable but hardly mansion-like bungalow in south Edmonton, and in which they had been living for a couple of decades. "It was still new to her," laughs Graham. Graham also likes to relate the story of how Shirley Stollery once treated herself to a new car and rode around town showing it off. It was a Subaru. Shirley Stollery went through her life exhibiting a kindness and dignity that had an impact on everyone and everything around her, including ECF.

The passing of Shirley Stollery in 2011 and the naming of Slatter Way in 2012 reminded us that those responsible for the rebirth of ECF were discreet people who were more concerned with getting things done right than with drawing attention to themselves. John Slatter often said one of ECF's greatest challenges was going to be making sure the community knew what ECF was and what it was capable of doing. This may be why there remains a slight philosophical disconnect between the humility of community service and the challenge of creating public awareness in an age of information overload. This debate was real in the halls (okay, the hall) of ECF when it started and it's an even more relevant discussion today.

"We've run surveys over the past few years," Carol Watson said in early 2019, "and we found that awareness of ECF was about 30% in the community, which is pretty good. Then we ran it again the next year and again in the spring of 2019 and we found in 2019 that our awareness had jumped to 43%, which is amazing." Watson attributes the momentum to the suite of tools ECF is using to get the word out—from its longstanding public services such as Willpower Wills Week

and the Endowment Sustainability Program, to newer developments, such as *Legacy in Action*, the Well-Endowed Podcast and even projects such as the Canada 150 High Level Lit project. “I think a lot of it,” adds Watson, “is that we are telling stories of donors, of grantees, of projects and organizations and individuals, and they’re all excited to see their stories or hear their stories; but more importantly, we’re creating all these things both for people who know what ECF is and those who don’t.” And because Edmonton is only going to keep expanding and diversifying, Watson and her team are going to have to keep developing new communication tools to make Edmontonians aware of what an amazing resource they have at their disposal. Yet this awareness, as Kathy Hawkesworth and her team know, must always be balanced with a great sensitivity towards understanding why donors give to begin with. It’s a delicate and never-ending need for awareness between recognition and intent in communities large and small.

One of the things that makes Edmonton special, of course, is that it has a remarkable diversity of communities that, together, create the unique community that is Edmonton. It was in late 2009 and into 2010 that the Edmonton Chinese Lions Club was celebrating its 30th Charter anniversary. They wanted to find a special way to commemorate the occasion, ideally through many different projects. Eugene Chow is one of the charter members of the Club and he remembers that the Club really wanted to do something that would benefit the community in the near term but that would also last well into the future. “I am a Chartered Accountant,” says Eugene, “and through my work I was aware of the work and results of ECF in the community.” After discussing various options, the Club’s board of directors decided that creating a legacy fund project through ECF would be a wonderful way to celebrate the Club’s three decades of work in their community. “One of our directors, Lan Chan-Marples, proposed establishing a scholarship fund for NorQuest College students,” says Eugene. “We were aware that the U of A, NAIT and MacEwan all had higher profiles in Edmonton and likely had more funding for scholarships as a result. We chose social work because we believed that this area was also likely underfunded for scholarships.” It’s proven to be a successful program, even though it’s still young. To date, it has provided \$7,200 to the NorQuest College Foundation, specifically for students working

*Barbara Poole
visits with Craig
Stumpf-Allen, ECF's
Director of Grants
and Community
Engagement.*



in human services. The goal is simple but can have lasting positive consequences. “We expect the scholarship students to finish their studies,” says Eugene, “and to then contribute to their community.”

There are so many who have helped make ECF what it is, but the death of Barbara Poole in December 2012 marked the loss of the last member of the three founding families. In the nearly six years after her husband had died, Barbara Poole remained a dynamic part of Edmonton’s cultural and philanthropic scene. She took an active and often directly individual role in supporting many causes throughout Edmonton, whether via ECF or some other route. Her energy and passion were legendary, and when she thought she could make a difference, she acted. The Young Edmonton Grants program was just one example; there were dozens of others. Barbara Poole was a symbol of the original donation responsible for the founding of ECF, but also of an era in which it took those kinds of interventions to bring about such a city-altering project. Edmonton in the early 1970s, despite Tevie Miller’s laudable tenacity, simply wasn’t big enough or ready enough or mature enough as an entity or through the efforts of its citizens, to start a foundation. But it wasn’t all that much bigger in the late 1980s either, which is why we needed the Pooles and the Stollerys to step up and make it happen. The former *Edmonton Journal* columnist and now

Senator, Paula Simons, once likened John and Barbara Poole to the Italian Medicis, the prominent family responsible for fostering much of the building in classical Italy, as well as for supporting artists and thinkers like Michelangelo, Leonardo da Vinci and Galileo.

History will be the judge of such comparisons, but one thing is beyond question. Barbara Poole was a direct link back to the magical moments of ECF's rebirth, those days when no more than a handful of people knew they were about to launch something potentially historic. We can't know this now, and certainly she had a multitude of reasons to explain her energy even up to her last days, but it's not hard to imagine that the laughter and joy Barbara Poole displayed at every ECF event had something to do with witnessing how miraculously it had all turned out.

The bigger picture can only come into focus when individual actions and funds are born of compassion and a desire, often in the face of grief, to still make our community better. The Owen Schlosser Fund (OSF) was established in memory of William Owen Schlosser. Owen passed away when he was just 21, from melanoma. He was a great athlete who played many sports and also completed a degree in Design at the University of Alberta. Owen's sister, Evelyn Chicoine, recalls that after they lost Owen in 2009, they talked as a family about ways they could remember Owen and do something in his memory. "We really wanted to do something lasting," she says. "He was just so passionate about sport, and so we knew that the best way to connect his spirit and memory would be through sport."

Owen was not just passionate about sport, he cared about people, and one anecdote in particular seemed to sum up so much about Owen. He was in his early teens and his team was playing against an inner city team, in a game organized by the coaches. Many of their players didn't have the proper outfits or even cleats. "Owen was quite upset about that," Evelyn remembers, "and after the game he asked our mother if he could give the other team his soccer shoes. He really cared. That stuck with mum and after Owen died, the fund was created in his memory to help youth participate in sport."

Owen's friends were also in a place of deep grief after losing him, and they decided to hold an event called Win4Skin. It has continued for ten years and has become closely aligned to the OSF. The community

and generous donors involved in Win4Skin have helped the OSF continue to grow, and Evelyn, her siblings and cousins decide together how to disburse the funds. “None of us are financial experts,” says Evelyn, “and so we really appreciate the help ECF gives us in managing the fund. We may not be a big fund, but ECF still gives us time and attention so that we can make impactful choices.”

Organizations like KidSport, Free Footie, Crystal Kids and Sport Central have all benefited from funding from the OSF and Win4Skin. “Every year when we decide where to direct the funds, and who they might help, we get to think about what Owen loved and talk about what he might have wanted to support,” says Evelyn. “It’s a special way to think about him and to revisit his spirit every year.”

► ECF had entered its modern phase by 2013. The number of funds was increasing every year, the asset base was expanding steadily, the donor base was growing, and various communication tools were helping Edmontonians understand the resource they had at their fingertips. The Foundation itself also began to understand to an increasing extent the potential it possessed, which goes some way towards explaining the introduction of the Alberta Social Enterprise Venture Fund, which we alluded to earlier around the launch of the SEF. This program was an expression of the confident vision ECF has around its role in the community.

ECF also initiated Vital Signs in 2013. This national program, based on producing strong local demographic data to inform fact-based funding and programming decisions, had yet to be introduced in Edmonton. Carol Watson remembers that it wasn’t “an obvious no-brainer,” only because she had seen it divide rather than unite other communities. “I’d seen in other cities where the Foundations involved had graded services and sectors,” remembers Watson, “so that, for instance, Transportation might get a D. To me, that felt divisive and I didn’t want ECF and the City to be grading these things. We were going to be doing a lot of work together and this was meant to be collaborative. I had roots there from working with the City and so to me it had to be about working well together.”

Watson and Garber-Conrad, along with other ECF staff, discussed their approach, and realized that it had vast potential as a public



◀ ECF's 2016 Vital Signs Report on newcomers featured a citizenship ceremony at the Stanley Milner Library in downtown Edmonton.

▼ Bin Lau reads a copy of ECF's 2016 Vital Signs Report on newcomers at the Stanley Milner Library in downtown Edmonton.



awareness tool. With the right mix of philosophies and platforms and partners, Vital Signs could be of great benefit to the community. Ultimately, they decided to focus on single issues at a time to help focus and heighten citizen awareness, and in that first year, the issue was food security.

“It was such a positive experience,” says Watson. “The connections people were making. [We worked] with the Edmonton Social Planning Council on the research side [and] with the *Edmonton Journal* on publishing the data. Of course, the data itself wasn’t particularly positive, but that was kind of the whole point—to raise awareness around these issues. And the feedback we got was staggering. The universities were asking for copies, so was NorQuest, so were high schools. We knew we’d struck a chord.”

Garber-Conrad has similar recollections. “It was unifying,” he says. “We try to get academic experts and bureaucratic experts on the advisory committees, but we also search for people out there doing the work in the trenches in our communities. It builds everyone’s capacity to be intimately associated with a subject and to share the results. It gives us all a chance to look at real data and ask ourselves, ‘Okay, there’s the data, what does it mean and how does this play out in our community.’ We want there to be as many chairs in the room as possible. That’s why, in other communities, they might have Vital Signs staffed internally or hire consultants, but we partnered with the Edmonton Social Planning Council to be the research arm. Since we started Vital Signs here in Edmonton, it’s proven to be a good thing for this community. It’s pulled together a lot of threads that were around in the community and just hadn’t found the appropriate outlet. We’ve been able to make a contribution there.”

Since its inception in Edmonton, Vital Signs has focused on areas such as food security, Indigenous women, sexual orientation, newcomers, youth, the arts, and visible minority women. It’s a program that has proven vital to our understanding of who we are in Edmonton and how we can do better. It is also further evidence of Garber-Conrad’s keen sense of his community and its needs, a capacity that has not gone unnoticed. In 2004, he was included as one of 100 leaders in the Edmontonian of the Century list put out for the city’s centennial and in 2013 he received a Queen’s Diamond Jubilee Medal. In the spring 2019,



*Board Chair
Carman McNary
(2012–2014), oversaw
the creation of the
Social Enterprise
Fund in 2013. SEF
is a loan fund that
invests its capital
with consideration for
both financial return
and social impact.*

he received an Honorary Doctor of Laws degree from the University of Alberta.

As difficult as it was to believe, 2014 arrived and suddenly ECF was 25 years old. It was a moment of some reflection, a time to look back while stepping forward. Carman McNary was board chair that year. In addition to being one of Canada’s most respected tax lawyers, McNary is a retired Captain of the Royal Canadian Navy. He was appointed Queen’s Counsel in 2010, which is only fitting, given that he is also a recipient of the Queen’s Golden and Diamond Jubilee Medals. He later co-chaired Edmonton’s 2017 United Way campaign, was vice-chair of the Metro Mayors Advisory Task Force, and served on the Mayor’s Task Force on Poverty as well as on the Edmonton Homeless Commission. McNary is yet another example of the kind of Edmontonian drawn to ECF once they understand the unique capacity of ECF and endowed giving. But what is that mix of elements, precisely? Donors trust ECF to steward both their donation and their vision for making Edmonton better. Volunteers see in ECF a conduit for their passion and energy. Even more significantly, both donors and volunteers recognize a fundamental truth about ECF—it inspires and it delivers. People who

are community-minded all seek a way for our dreams and hopes to become reality, and therein lies the magic of ECF. Our aspirations are supported by achievement. Every new year reinforces how ECF manages to both reach for the clouds and keep its feet on the ground. Carman McNary echoes this sense when he recalls discussions about how to celebrate ECF's 25th anniversary in 2014. "To me," he says, "so much of what ECF is about is symbolized by the Return sculpture. We talked a lot about this during the ECF's 25th, but the symbols were reinforced when we had the chance to visit the Cleveland Foundation, the granddaddy of all community foundations, when they had their 100th anniversary in 2014. The Cleveland Foundation absolutely saved their community when it was hollowed out as part of the rust belt—strategically investing and granting resources critical to community recovery. ECF has to be there for Edmonton in the same way, good times and bad. And so thinking about us and about them, I've always seen the sculpture as a great symbol of what we were on our 25th, and continue to be. The pillars by themselves could not stand as strong, but together they do. Building links into the community to raise long-term endowment funds is the first pillar, the prudent stewardship and investment of those funds is the second, and then the third pillar is the strategic deployment of resources through both grants and investment. It's that combination that makes it all work—each pillar strengthening the other."

Kathy Hawkesworth says that over the lifespan of ECF, it really has been about understanding the evolution from its beginnings as a donor/granter foundation to something much broader and more imaginative. "I don't think we're nearly the untold story we were way back when," she says. "And our story is different. I think our story is about being a facilitator, an assistant, a resource. Yes, we are a destination for donations, but also a source for funding and ideas and innovation. Being a young foundation and building, that's innovative in and of itself, but when you work in the sectors we work in and deal with age-old problems like homelessness and poverty, well, we have to try new things because what's old is not going to fix it."

There were many stirring examples of finding new approaches for old problems during ECF's 25th anniversary year, one being the Addiction Recovery and Community Health Clinic (ARCH) program

at the Royal Alexandra Hospital. Various inner city agencies had long realized that many of Edmonton's most vulnerable citizens—persons with addiction and mental health issues, often combined with homelessness—struggled to find genuinely beneficial service in the inner city. ECF worked with numerous inner-city agencies to locate start-up funding for a program that would design a new service from the ground up, identifying precisely what people needed rather than what might get funding. The ARCH team worked with patients and other emergency and/or inpatient teams to assist with complicated drug and alcohol withdrawal scenarios, assessment and treatment recommendations, harm reduction, opioid agonist therapy, connections to primary and community-based care, housing, healthcare, health promotion, and different types of counselling. A research component also tracked outcome evaluations and the development of a long-term vision for inner city health.

It has proven to be a successful program on an individual-by-individual basis. ECF committed a six-figure grant to the program, but even more significantly, helped cement a broad partnership around funding the program, garnering \$4.25 million over three years. It was this strong community partnership that led Alberta Health and Alberta Health Services to ultimately decide to commit to ongoing funding for the program. It is a great example of how ECF's role has evolved. In the past, ECF might have been but one partner committing a dollar amount to a worthy project. In this case, ECF was one of the drivers of the project, a galvanizing force that actually instigated governmental action and commitment so as to not only create social action but make it stick.

The 25th anniversary also allowed for the opportunity to reflect upon a few numbers. It's only right that we measure the success of ECF by the effectiveness and originality of how it engages donors and then puts its resources to work in the community; that won't ever change. But it's also true that donor engagement and granting services would not be nearly as effective as they are, nor as able and willing to think in new ways, if ECF had not been (and continues to be) so soundly run at the administrative level. And the numbers bear that out. In 2015, the consolidated trust fund stood at \$489.3 million, up nearly \$85 million from 2013 alone. Since inception in 1989, the average annual return

on the fund had been an impressive 8.24%. As an aside, it's important to recall the fundamentally conservative investing strategy required of an endowment structure. As Doug Stollery says of his father Bob Stollery, "He used to say about investing of this type, "There are a couple of possible investment strategies. You can prudently invest what you have and earn a reasonable return or you can roll the dice on risky investments with the chance of either a big gain or a big loss. An endowed foundation is not a casino. The people who have trusted the foundation with their donations are looking to us to protect the fund, not to gamble it away."

And of course the oxygen of ECF has always been the number of individual funds set up for ECF to oversee—in 2014 that number was no fewer than 63 and the average had been steadily rising since day one. John Slatter and Bob Stollery, all those years ago, had also stressed the actual and symbolic value of maintaining low administrative costs, setting one percent as the target. Incredibly, even up to its 25th anniversary year, those costs had held steady and even dropped. In 2015, the administrative costs were just 0.67% of the total market value of the funds. For an organization that was then closing in on half a billion dollars in assets to hold admin costs well below one percent is a great achievement in its own right, while also demonstrating to donors how wisely and astutely their donations were being deployed.

But the most important number has always been the amount disbursed every year, since it's that amount that is directly contributing to making Edmonton a safer, more vibrant, more connected and more caring community. In 2015, over \$21 million was distributed to organizations doing amazing things. That year, \$1.5 million went to the EALT, \$40,000 went to STARS (the Shock Trauma Air Rescue Society), \$10,000 went to Theatre Network to help the rebuild after a fire. There are so many more. Hundreds, in fact. An example of how inspiring such grants could be was Free2BME, which Legacy in Action profiled as part of its 25th anniversary issue. Since 2005, Free2BME had been helping children with developmental disabilities gain the confidence and ability to participate in a wide variety of activities, the key aspect being that they got to choose the activity. For too long, these persons had been steered towards activities others chose for them. Free2BME gave them the choice. The U of A Butterdome provided the

Lorne Cardinal stars in the critically acclaimed Where the Blood Mixes, a Theatre Network production partially funded by ECF. The play brought a deeply personal story about the impacts of Canada's residential schools to Edmonton audiences.



space, but a grant from ECF supplied half the amount needed for a staff position and the PALS program (Physical Activity Lead by Students), which also had an educational/lab component for the students. For children who are often autistic, non-verbal and with physical impairments, the chance to develop physical skills (which often leads to development in other areas) created a whole new way of interacting and understanding. Programs like Fre2BME are as much part of ECF's legacy as the Social Enterprise Fund or the Edmonton Community Development Corporation.

Given the growth and reach of ECF, it was inevitable that we would outgrow Hilltop House. That day arrived in 2015. "We just needed more space," says Martin Garber-Conrad. "There were so many ways we could have chosen to get more space, and whenever you renovate you're never really sure about it, even when you have brilliant architects involved."

Here Garber-Conrad is referring to the much-lauded local firm Manasc-Isaac, which is responsible for so many iconic buildings in western Canada. As Manasc-Isaac says about the project, "ECF approached us to help them expand their headquarters in their beloved Hilltop House. Built in 1912, it didn't offer the organization enough space. ECF decided to integrate it with a neighbouring structure that had become vacant: the robust AGT Building, a former telephone equipment building from the 1960s. Marrying these two structures required a deeply collaborative approach through which ECF identified the requirements for their future. Ultimately, our design team created a new building to act as a link between the two existing structures. This link building reads as a transparent volume, therefore respecting the historical integrity of the two disparate structures that it unites. Energy efficiency upgrades were implemented at both Hilltop House and the AGT Building, offering occupants beautiful and healthy spaces."

Which was more or less how it's now being used. As Garber-Conrad says, "The new space is in demand by groups we had hoped would use it, as well as others who are just hearing about it." It's part of the community, in other words. "The building has met all our expectations," he adds, "and in many ways has exceeded them. The Link, that space in between the house and the old building, has proved

A view of the exterior construction of what would become known as The Link. The Link features ECF's reception area and boardroom that connects Hilltop House to the old Telus Building. Designs for the project were created by Manasc Isaac.



to be such a useful community space. Yes, we use it ourselves, but most of the use it gets is when we invite the community in. It can be for Vital Signs meetings, it can be receptions for donors, it can be teaching and learning activities, it can be groups that are trying to get their head around a new problem. Sure, you can meet in a dingy old warehouse and still have good people around the table and get things done, but quality space is not irrelevant to outcomes. We've been very pleased that we have that kind of space we can welcome the community into."

► After the whirlwind of the 25th anniversary and the Hilltop House renovation, ECF continued to strengthen its core activities while expanding its reach into new areas of proactive programming and granting, communications and storytelling. One of those core activities that just kept getting better and better was Willpower Wills Week, which hit its 20th anniversary in 2015 and still shows no signs of losing its relevance and reach. Vital Signs continued to help Edmontonians understand the demographic realities of their community. The Social Enterprise Fund was in full stride, supporting a multitude of local enterprises, such as CKUA in their move to their new building, the Whitemud Equine Learning Centre to their new site, Localize in its activities to ensure local produce data, the Centre for Race and Culture to market a new consulting service to further its mission of creating a more inclusive society.

But on top of these core functions, ECF continued to support programs and ideas and funds that offered a new way of helping or a different way of looking at the world. The Awinita Scholarship Fund exemplifies this. It turned out that the award-winning writer, Nancy Huston, born in Calgary but resident in France, received a significant amount of money for her archival papers from the National Library and Archives of Canada. Through the advice of her lawyer, Huston transferred the amount to ECF to start the Awinita Scholarship Fund. It is named after an aboriginal teen who suffers sexual exploitation in Huston's 2013 novel *Black Dance*. The scholarship grants are awarded to women (with priority given to First Nations or Métis women) who have been, or are at risk of becoming, sexually exploited. The award can be used in either a post-secondary or professional training setting.



◀ *Ted Kouri, ECF's Board Chair from 2015-2016, and his wife Mai Anh Le Van created the Kouri Family Fund to support people struggling to start a family and assist in creating fun, educational, and healthy environments for children.*

▼ *CKUA has received numerous grants over the years including to help renovate the Alberta Hotel into their new broadcast studio and office space in downtown Edmonton.*



Ted Kouri is the co-founder and president of Incite, a marketing strategy consulting firm. He took over from Carman McNary as ECF board chair in 2016 and was keen to work with Martin Garber-Conrad and the rest of the board to strengthen ECF's presence and to work with a younger generation of business and community leaders. Kouri's wife Mai Anh Le Van worked with ECF from 2002-04 in programming and helped set up the ECF's scholarship program. They created their own family fund in 2009. They had experienced challenges in starting a family and saw ECF and their fund as a way to honour that journey and help teach their adopted children the meaning of community and legacy. Kouri remembers how impressive ECF was to him then, and he wanted to be a larger part of it. That came about with his board term and time as chair. "To me," he says, "I think the most impressive thing was how ECF has evolved over time from being a community supporter to a change maker. It has been instrumental in helping our community in so many ways. ECF is a great example in the endowment world of the power of big numbers. ECF now drives significant change in the community, and has taken an entrepreneurial approach to helping, from kickstarting the Edmonton Community Development Company (ECDC) to creating the SEF and the Venture fund."

Just those programs alone, says Kouri, make a huge difference in ECF's ability to effect change. Instead of utilizing its asset base solely through disbursing roughly four percent back to the community in grants, it now also uses the SEF and Venture fund to change that metric by deploying an additional ten percent of its investments through social purpose lending.

"So now suddenly instead of four percent," he says, "we've got 14% of our assets at work every year, making change, and making an impact in the community. It's a trend I think you're going to keep seeing. One, the fund overall is going to continue to grow. And second, more of those funds will become discretionary, which means ECF is only going to have an even greater role as a catalyst in the community."

To be sure, the creation of something like the ECDC represented catalytic thinking from ECF. Some kind of community development corporation had been under discussion in Edmonton for decades, having first been proposed in the mid-1970s by the Edmonton Social Planning Council as a vehicle to drive business and individual growth



Andrew Paul and Lisa Pruden record an episode of ECF's The Well Endowed Podcast in 2018. The podcast won Gold for best Consumer Podcast in the 2018 Canadian Online Publishing Awards.

in the inner city. In 2016, the ECDC was formed when it was included as a key recommendation in the End Poverty Edmonton Road Map approved by Council. ECF was a key driver and advisor in those discussions; this kind of social investment thinking has long been a passion of Garber-Conrad's. ECF's support of the concept was essential to getting it approved, and when it got City approval, ECF incubated the project, offering direct and indirect funding, as well as expertise. The City contributed long-term funding, as well as numerous parcels of land valued at over \$10 million. One of the innovative elements of the plan is that much of the land the City donated is "orphaned," meaning the City cannot find a suitable municipal use for it. An example might be a corner lot that is too small for economic development. The ECDC answer? Explore putting up a tiny home with a square footage under 500 feet. Today, the ECDC has numerous projects on the go in various inner city neighbourhoods in the areas of economic development, job training, housing and really just about anything else of socio-economic value in the lives of residents. Probably its biggest project is ArtsCommon 118, a plan to build mixed-use structures along 118th

Avenue that allow for live-work spaces for artists, market space, a coffee shop, job creation sites, rooftop farming and a music school, among other things. The hope is to have it open by the Fall of 2021. It's ambitious and daring, but it's the kind of thinking Edmonton needs and ECF can help provide.

"ECF has a culture of innovation," stresses Kathy Hawkesworth, "which is tied to our uniquely deep knowledge of our community in a broad way. People in Edmonton are understanding more every day that ECF is a place where you can have a conversation about supporting something that matters to you forever. We're here to steward, to support, to fit in pieces of the puzzle, to memorialize. And to answer questions. And if we don't have the answer, we probably know who will."

Part of what continues to expand the community's knowledge of ECF are the many communications tools we alluded to earlier that Carol Watson and her team are using to spread the word. In 2016, ECF launched The Well-Endowed Podcast and it has reached an entirely new, younger, multi-media savvy audience. As of 2019, it's hosted by Communications staff Elizabeth Bonkink and Andrew Paul and edited by Lisa Pruden. The first episode looked at the 2016 Vital Signs report, and also featured interviews with the Cree and Jewish improv troupe, Folk Lordz. It's now 57 episodes in and the conversations have never been less than fascinating, whether through a new look at the EALT, a frank discussion about the report of the Truth and Reconciliation Commission, food security, Canada's 150th birthday party, queer history in Alberta, connecting newcomers to Indigenous culture, the Fort McMurray wildfires, or feminist pop culture narratives. The Well-Endowed Podcast has earned some well-deserved recognition; it won Gold in the Consumer: Best Podcast category of the 2018 Canadian Online Publishing Awards.

Taking note of the Fort McMurray wildfires, it has also become part of ECF's legacy to step in and help when tragedy strikes, again all as part of its evolution as a proactive organization. Even as far back as 2009, ECF was helping out in such ways with programs such as Edzimkulu, a society for children of AIDS, with their disaster relief efforts. In 2011, ECF contributed to the Slave Lake rebuilding fund. In 2013, it supported Calgary, Medicine Hat, Banff, and Canmore in their flood recovery efforts. In 2015, it supported the Theatre Network



Malcolm Azania interviews Jalal Barzanji at the first High Level Lit Salon. High Level Lit was a Canada 150 collaboration between ECF, LitFest Alberta and Eighteen Bridges Magazine that featured 12 essays reflecting on Canada's Sesquicentennial in 2017.

fire recovery fund. And in 2017 and 2018, it was part of Canadian Foundation solidarity efforts to support Quebec and Toronto after attacks against citizens.

When Canada turned 150 in 2017, ECF decided to participate in a unique way. Having long believed that storytelling was central to who we are and how we understand ourselves, ECF decided to celebrate the birthday through that form. It created the High Level Lit reading series that culminated in the publication of a special issue of the Edmonton-based award-winning magazine *Eighteen Bridges*. The collaboration between LitFest, *Eighteen Bridges* and ECF led to an astonishing array of writers and creators being given licence to create an original piece that spoke to the relationship between Edmonton and Canada's 150th. Some wrote memoir, some wrote poetry, some wrote fiction, some produced graphic narratives. Writers such as Paula Simons, Cadence Weapon, Jalal Barzanji, Myrna Kostash, Omar Mouallem, Anna Marie Sewell, Richard van Camp, Catrin Owen and Ben Wheelwright created works of beauty and insight to help us understand our home. They read

► Omar Mouallem won a Gold Medal at the National Magazine Awards for his contribution to ECF's High Level Lit collaboration with LitFest Alberta and Eighteen Bridges Magazine.





▲ Clockwise from top left: Anna Marie Sewell, Rollie Pemberton, Myrna Kostash, and Richard Van Camp, four of the 12 authors consigned to “muse on YEG for Canada150,” as part of ECF’s award-winning High Level Lit collaboration with LitFest Alberta and Eighteen Bridges Magazine.

◀ L to R: Carol Watson, Curtis Gillespie, Elizabeth Bonkink, Fawnda Mithrush and Andrew Paul at the 2017 Alberta Magazine Publishers Association awards. Eighteen Bridges was named Magazine of the Year for 2017, and the High Level Lit special issue won Gold for Best Editorial Package.



In 2003, more than 80 per cent of students participating in the Rights of Passion program at the Bent Arrow Traditional Healing Society went on to high school. This was at a time when less than five per cent of Indigenous youth in Canada who started junior high actually finished high school.

from their work at four different salons, with the final salon held in conjunction with LitFest. This project struck a chord—*Eighteen Bridges* was named Magazine of the Year for 2017 at the Alberta Magazine Publishers Association awards, largely on the strength of that special issue, and Omar Mouallem won a Gold Medal at the National Magazine Awards for his contribution to the project.

Of course, throughout these times of innovation, ECF continued to provide funding to a mind-boggling number and diversity of programs and ideas. Right through to 2019, we have seen a dedicated focus to addressing the core issues of our society. Poverty, homelessness, the plight of those less fortunate, those with disabilities or an addiction, those with an idea to create something of cultural beauty, the environment, Indigenous and multicultural issues, issues of sexuality and belonging, the strength and meaning of family—all

these continued to receive strong support from ECF through myriad grants. We can look at Eat, Walk, Live, which is part of NSTEP (Nutrition, Students, Teachers Exercising with Parents) and its program to incorporate healthy living from nutrition to exercise to mindfulness into every part of the school curriculum throughout grade school. Or the Terra Centre and its programs for parents under the age of 25, assisting with guidance on everything from parenting strategies to finances to housing. Or the aforementioned Edmonton Community Development Company under the directorship of Mark Holgrem, which works with inner city neighbourhoods around economic development, job training, affordable housing, and social infrastructure. Or New in Town, a Bent Arrow program that helps Indigenous people from all over the country settle or re-settle in Edmonton. Or the BGC Bigs (Boys & Girls Clubs Big Brothers Big Sisters) Youth Employment mentorship, job placement and skill-development programs for youths between the ages of 13 and 24 who come from low-income, Indigenous and newcomer families.

“ECF has a unique ability to bring leaders together to enhance quality of life,” says current board chair, Zahra Somani. “The work of the Foundation today plays an important role in everything from youth development to caring for our elderly. We are very grateful to the generosity and foresight of the families that helped to establish the Foundation 30 years ago.”

Somani joined ECF’s board of directors in 2017 and became the Foundation’s chair in 2019. Her background in the hospitality industry, as well as her time serving on the board of the Stollery Children’s Hospital Foundation and the Mayor’s Task Force to End Poverty, has provided Somani great insight into how quickly the needs of the community are shifting.

“Our economic landscape is changing; our demographic is more diverse and the way that people give requires us to be innovative and creative in our approach.”

Leading the way is exactly what ECF is doing. Somani credits ECF’s ability to evolve and stay relevant to the bedrock principles laid out by its founders: hard work, sustainability and high impact. Those principles, combined with the tenacious generosity of ECF’s current



Zahra Somani became ECF's Board Chair in 2019 and is leading the Foundation into the next 30 years of its history.

donor base, enables the Foundation to help hundreds of charities achieve their goals every year in all fields of interest: ranging from the arts and sports to education, health and well-being.

“I find it very exciting that although we are still a young foundation, we are amongst the top five in the country. Working together hand-in-hand with volunteers, board members and partner organizations has enabled the foundation to develop and model best practice in key areas including granting and measuring impact.”

Somani is a champion of Edmonton's entrepreneurial spirit and understands that a team, in this case an entire community, is only as strong as the voices at the table that help steer it. She is passionate about ensuring that the voices around ECF's table reflect the complexity of the city it supports.

“This is so important,” she says. “We need to get this right.”

“There’s no doubt we have to change and evolve,” says Martin Garber-Conrad. “When it comes to diversity and inclusion and Indigenous peoples and the environment, we’re doing a good job in many ways, but we can do better. We’re working quite deliberately on that. The board has encouraged, directed, pushed us to do even more. That will mean increasing diversity and inclusion in our staff, in our boards, in our grants, and hopefully in our donors. But it’s not just about issues of diversity. It’s also about reflecting the youth of our community so that the younger generations will find their meaningful role over the next couple of years. I think we’ll see ourselves doing a better job of reflecting the increasingly diverse reality of our community in terms of its composition, getting a better handle on the needs that the increasing diversity our community presents and understanding the opportunities that all those things present.”

► In 2019, Jacquelyn and Hunter Cardinal were commissioned to produce a six-part interview series for ECF's *The Well Endowed Podcast*. The series featured interviews with prominent Edmontonians through an Indigenous lens.



CONCLUSION

◀ L to R: Mayor Don Iveson, ECF CEO, Martin Garber-Conrad, Governor General David Johnson and ECF Board Chair, Carman McNary (2012–2014), pose for the cameras at an ECF event in 2014.

ECF IS BOTH an emotional and tangible presence. Over the last three decades tens of thousands of Edmontonian have dreamt of a better community, and ECF has found ways to help them make it happen. We are a collection of our hopes and dreams and stories, and ECF has helped give those ideas their best chance for success. Whether someone is making a donation, setting up a fund, working as a volunteer, or applying for program funding, the common denominators are caring and a desire to act on that feeling. And that's where ECF comes in. To support you and stand with you. ECF relies on the faith of Edmontonians as much as Edmontonians rely on ECF for its marriage of encouragement and stewardship. ECF would not exist without the energy, ideas and love of the Edmontonians who give it purpose.

Trying to imagine where ECF goes next is an exciting prospect and an impossible task. Who can predict what ideas and inspirations Edmontonians will come up with? The previous three decades have taught us it would be folly to guess. Who could possibly have foreseen, 30 years ago, what ECF would become? It's even more difficult to comprehend how Tevie Miller and his committee could not get ECF off the ground due to the lack of "money and manpower," yet today, with assets worth more than \$560 million, it is entirely possible that ECF's asset base will hit a billion dollars in less time than it took to get to half that.

Perhaps even more astonishing is that over \$240 million has been granted to hundreds of charities, organizations, students, artists, creators, educators, and researchers. ECF is now disbursing more per year than the amount with which it was founded. The variety of ideas, causes, passions, pursuits, needs and subjects supported by ECF is nothing short of inspiring. The ECF is a mirror of this community, and it reflects the great reciprocity between ECF and the citizens of Edmonton. ECF manages over 1,200 funds—from designated funds to donor-advised funds to student award funds and emerging funds, not to mention hundreds of future funds set aside by many in their estate planning.

When we step back to consider what ECF has become, it's scarcely believable that it began with \$15 million in its coffers, no executive director, one paid employee and a single office with furniture donated by the Royal Bank. But therein lies the value of the long view. ECF will continue to provide a vehicle for those who want to help their community and are comfortable with the effect of their gift only being felt after their lifetime. The staff regularly remind themselves that they are doing their work for a result that may be years or even decades away. Martin Garber-Conrad remembers talking with his predecessor, Doug McNally, during their transition. "Doug said to me, 'You know, Martin, a lot of work that I've done with donors, you're going to get the benefit of that, because that's going to come through on your watch. But so much of the good work that you do with donors, you won't necessarily see the result of that but your successor will. So just always keep that in mind.' It was a wise perspective."

Especially so because it's not the norm in charitable work, which so often revolves around annual campaigns that immediately distribute the majority of the funds raised.

"Legacy giving is different," says Garber-Conrad. "We don't need a person's donation this year or maybe even next year, but we need it over the long term, which is why so much of how we do our work is about just making sure we have strong relationships with our donors, our grantees, and the organizations we collaborate with. It's the only way for us to be successful, because 'success' means Edmonton wins. And the wonderful thing about legacy giving is that it's actually more relevant for people who are not Pooles and Stollerys and Footes. For people like most of us, who don't have millions of dollars to give away, but who nevertheless have assets, we can be most generous with those assets when we don't need them anymore. That's the principle of legacy giving."

Legacy giving is simply another tool in the philanthropic toolbox, and the reality is that it doesn't appeal to everybody. There are many ways to make your community better. But if you are someone who has an interest in the long-term impact, it's a vital tool. "For people who do have that kind of interest," adds Garber-Conrad, "what we do at ECF is a really good way to leave a substantial legacy to organizations and causes that are important to you."

Kathy Hawkesworth endorses Garber-Conrad's emphasis on relationships. "It's the group effort," she says. "That's the really lovely thing. Yes, we were started by these three wonderful families, but what makes this such a special place is those people who give us so much. It's about having conversations with people and finding out what their passion is and why they care about their community."

There will certainly be challenges. It's a frantic and splintered world in which an endless array of problems come at us with increasing speed, and this affects how people give and how they view philanthropy. "Certainly, the younger generation give differently than the older generations," says Carol Watson. "We have to adjust and we also have to educate. Again, it's about relationships and meeting people where they're at. That's going to be a challenge in this social media age, where everything is instant. And that's not just a communications

challenge, that's a challenge to the whole idea of legacy giving, where the 'payoff' is often years or decades away." And that might well be ECF's biggest hurdle in the near future—meeting people where they are in an age where it's nearly impossible to keep up. "It's not a bad thing," laughs Watson. "But it's hard to really predict where it's all going. No one knows!"

Yet, through the excitement, the uncertainty, the speed of modern life and its attendant complications, ECF still retains the invaluable quality it had the day it opened its doors: Integrity.

Integrity was planted in ECF's root structure by the families who founded it and by the man who built it—the Pooles, the Stollerys and John Slatter. It was nurtured by the people who brought ECF to maturity—Ron Odynski, Ann Dea, Karen Platten, and many more. It was cemented by Doug McNally, the Executive Director who made ECF central to Edmonton's vision of itself. That integrity has been broadened and deepened through the invaluable stewardship of ECF's financial team today, through Kathy Hawkesworth and her team taking the time to meet people where they are at, through Carol Watson and her team using every tool available to communicate with Edmontonians, and through ECF's granting team making consistently wise decisions about disbursement. Integrity also reveals itself in the quiet but visionary leadership of Martin Garber-Conrad, who knows the greatest risk as ECF moves into the future would be to take no risks at all.

What has allowed ECF to become what it is today is trust. It's that simple. Edmontonians trust ECF with their donations. They trust ECF with their past and their future. They trust ECF to make decisions on their behalf. They trust ECF to properly interpret community needs and to address them appropriately. To the staff and volunteers of ECF, this trust represents a responsibility and a relationship. The founders envisioned an intense and profound level of integration into the community and responsibility towards that community, and today the ECF continues to provide that.