

Legacy in Action

EDMONTON COMMUNITY FOUNDATION

Strong Foundations

Recovery house gets its own rehabilitation



How to Change the World in
7 Easy Steps

Thinking **BIG**

Writer Marty Chan knows the key
to a successful community



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Restored with Care

Watch a short film about an artist who restored the iconic totem pole his grandfather built, with a \$24,000 preservation grant from ECF.



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EDMONTON COMMUNITY FOUNDATION

CEO
Martin Garber-Conrad

EXECUTIVE ASSISTANT/
COMMUNICATIONS COORDINATOR
Teresa Goldie

DIRECTOR OF COMMUNICATIONS
Carol Watson

SOCIAL MEDIA OFFICER
Andrew Paul

Edmonton Community Foundation
9910 103 St. NW
Edmonton, Alberta, Canada T5K 2V7
T 780.426.0015 F 780.425.0121

odvod publishing inc.

PUBLISHER
Orville Chubb

EDITOR
Omar Mouallem

ART DIRECTOR
Rory Lee

COPY EDITOR
Caroline Barlott

CONTRIBUTORS
Jason Everitt
Teresa Goldie
Michael Hingston
Kathryn MacDonell
Jason Lee Norman
Andrew Paul
Aaron Pedersen
Craig Stumpf-Allen

PRINTING
Transcontinental Inc.

Odvod Publishing Inc.
10221 123 St. NW
Edmonton, Alberta, Canada T5N 1N3
T 780.451.1379 F 780.482.5417
www.odvodpublishing.com

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Marty Chan was photographed by Aaron Pedersen at 3Ten Photo studios.



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Message from the CEO



This issue of *Legacy in Action* marks a change in the way Edmonton Community Foundation (ECF) communicates with its stakeholders and the broader community. We're moving away from the formal annual report style we've used in the past and towards a publication that can be more widely distributed and accessed.

As in the annual report, this issue of the magazine features stories about our donors and grant recipients and provides information on how to set up a fund — it's not as hard as you might think. For anyone interested in the details of ECF's 2011 financial performance, page 15 contains some of the highlights. If you want a more comprehensive look at last year's finances, the full audited financial statements can be viewed or downloaded on our website, ecfoundation.org.

We're very pleased to be welcoming local playwright and author Marty Chan as a keynote speaker at our annual meeting on June 14th. Arts, culture and heritage are some of the key funding areas for ECF. Many of our donors give generously to support local arts and festival organizations and we're looking forward to hearing Marty speak about the cultural value of the arts and their ability to inspire. There's an interview with him on page 6.

Each year seems to bring something new to ECF. In past years we've partnered with other organizations on such projects as the Social Enterprise Fund and the Edmonton & Area Land Trust. We've also initiated programs such as the Community Investment Partnership for a way to let donors know of emerging community needs and innovative programs. In early 2011, the inaugural grants from our Youth Empowerment Program (YEP) were approved. The program, funded by donors' gifts to support youth-led and community-focused projects, continues to grow, assisting young and aspiring philanthropists.

The motto of the Community Foundations of Canada is "All for Community." At ECF, we strive to help many people in the Edmonton community — donors, charities and fellow citizens — through programs, expertise and collaboration. Our hope is that ECF's magazine will speak to those who would like to use our services but need just a little bit of encouragement, whether it's to seek some funding, to leave a gift or to connect with us further on our website, Facebook or Twitter. Or, just by picking up the phone and giving us a call. Thank you! ○

—Martin Garber-Conrad

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— Global Real Estate Benchmark, Research Report 2011




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Marty Chan:

Full-time Artist, Part-time Philosopher

The celebrated writer, and ECF's keynote speaker at the 2012 AGM, on how the arts impacts our city

Author and playwright Marty Chan is the pride of his hometown Morinville. If the city had a key, he would have already received it by now. But in Edmonton, where he's lived since the 1980s, he's already found the key to our city — the arts.

Whether it be his novels, teleplays or, what he's most acclaimed for, plays, such as the *The Bone House* and *The Forbidden Phoenix*, every work that Chan creates becomes more than a personal success, but a success for the city and its arts community. That's why he's taken time to encourage and mentor the future Marty Chans of the city.

In 2002, he was the first playwright-in-residence at the Citadel Theatre. He was the chair of the Edmonton Arts Council in 2001, and last year he was the Edmonton Public Library's very busy writer-in-residence. Not to mention, throughout his career he's made regular visits to elementary schools to lead writing workshops and read from his children's books.

Chan believes that it isn't good enough to just plant the seed of the culture, you also have to help it grow. This is the message he aims to send as the keynote speaker at Edmonton Community Foundation's AGM in June. "I'm looking forward to talking about something that I love — the arts," he says. "Something that affects our lives."

What are you going to talk about in your keynote speech?

Without giving it all away? I want to give a sense of the impact of the arts on the community at large. I'm taking examples from my experiences as a children's book writer, and as a TV writer and playwright, to show that what you contribute in the arts has more than just the economic impact that everybody seems to wave around to justify its existence. The economic spinoff is an important argument to make, but I think that sometimes what gets lost in that argument is the sense of the human impact the arts have.

Do you know any artists impacting our lives in nontraditional ways?

You take a look at Steve Jobs. In the early part of his career, he took a calligraphy course and that resulted in the look of some of the fonts and styles used in Apple's computers. An art-based course inspired Steve Jobs to take what could have just been a functional piece of technology and turn it into something that really blossomed. I'm not saying that the calligraphy course is the main reason, but that is part of the fabric of how Apple evolved.

I wonder, what would happen if he didn't have access to that type of course? We may still have functional computers that we use today, but does the style inspire people? Does it inspire us to achieve the next level of things?

What's an example of that human impact?

Recently a bunch of theatre friends of mine were forwarding a picture around on the Internet of the stage manager's report on a play called *Harold and the Purple Crayon*, to identify what went right with the show and if there were any problems, and what the audience's response was.

The show report mentioned that technically the show went off the rails, but to forget all that. Because what happened was, there was an autistic boy in the audience with his teacher. He wasn't speaking and the teacher wasn't even sure if he knew her name. But, when the show started, the boy started responding to the show and began talking to his teacher. "Hey, there's a dragon!

I'll bet there's going to be fire!" Things like that. He became totally engaged and came out of his autism shell. But, as soon as the show was over, went back into his own little world.

For those 45 minutes, this kid, who hadn't been connected to anything else, suddenly came to life and became animated and was communicating. That's a perfect example of what I'm going to be talking about. *That impact.*

What do you think of private/public partnerships formed to support culture?

I think the partnerships are a good idea. I was recently on a tour of schools in Fort McMurray with other children's book writers, and the funding for that tour was sponsored by Suncor.

I think partnerships are an interesting model to play with, having private businesses being part of the development of a project rather than what exists now, which is sponsorship. As far as private enterprise involvement, the model seems to be distribution or dissemination. But we are seeing bits and pieces of private industry trying to make connections in the artistic community.

These would foster goodwill and a sense of recognition that these businesses are giving back to the community. It's all about building your community relations. Businesses rely on the community for their successes, and when you have all of that working, then all the parts of that community are strong.

What does having a strong artistic core do for the rest of the community?

It is sort of like a canary in a coal mine. If you have a strong artistic community, it just means that the general community is strong because they're recognizing that they'll have to support all facets of their community and not just the bottom-line items.

When you look back at the example of the autistic boy who became so animated watching the play, now his teacher has an access point to get that kid engaged in his community. It's just one kid, but that kid could make all the difference in the world. ○



Sheldon Rayner, executive director of Jellinek Society Recovery House

Sheldon Rayner sits at his cluttered desk in Jellinek House, waiting for his printer to finish spitting out page after page of reports for a board meeting. As the printer whirs and beeps, our conversation drifts from the importance of AA meetings to NIMBYism regarding addictions recovery facilities, like this one, in Edmonton neighbourhoods.

In his role as the executive director of the Jellinek Society Recovery House, a 50-year-old organization located south of Jasper Avenue on 112th Street, Rayner often finds himself defending the need for neighbourhoods to step up and play their parts in helping recovering addicts successfully integrate back into society.

“They have to recognize that these people are human beings and need support,” Rayner says. “And when addicts take the initiative and there are agencies in the community like Jellinek, providing support for them to make changes in their lives, we need neighbourhoods to help support them as well.” That’s not to say Rayner doesn’t understand the “natural and inherent fears” that community members have toward people struggling with addiction issues.

Many of the 15 men who stay at Jellinek have criminal pasts, and the society often receives referrals of residents from the Edmonton Drug Treatment and Community Restoration Court. But, Rayner says, not

a single resident has ever been charged or convicted of a crime during his 12-month stay. In fact, the opposite has happened; the residents have become symbols of goodwill in their neighbourhood.

“We have found our neighbours at the Jellinek House to be delightful,” says Norah Kennedy, executive director of the pregnancy care facility next door. “We have never had to worry about our sidewalks getting shovelled or our lawn being mowed. It’s always been done for us. In fact, one winter, when we had extreme amounts of snow, not only were our sidewalks shovelled, but our entire driveway and parking lot! Being neighbours with them has been a tremendous blessing for us, and we deeply appreciate their kindness.”

The key to transforming a life of crime and addiction into one of kindness and sobriety, says Rayner, is Jellinek’s ability to build a new foundation for its residents. Unlike most treatment programs, which last about two weeks, Jellinek residents have a safe place for up to a year — a place where they adhere to a strict regimen of AA meetings along with community involvement. Every week, residents are required to attend a minimum of five AA meetings. The meetings are hosted in the basement of Jellinek House, which has been refurbished with hardwood flooring and a podium to give the space a welcoming church-like atmosphere with plenty of seating. The mandatory meeting quota is reduced to a minimum of three per week if the resident >>

HOW IT WORKS: EDMONTON DRUG TREATMENT & COMMUNITY RESTORATION COURT

Started in 2005 to reduce the harm people cause to themselves and others through drug use, Edmonton Drug Treatment & Community Restoration Court is eligible to people who’ve been charged with non-violent Criminal Code offences, and whose underlying cause of offending is drug addiction.

The court provides an alternative to jail by giving offenders a chance to complete a drug treatment program. Participants must attend court weekly for eight to 18 months and discuss their progress with a judge. It emphasizes reintegrating offenders into the community and assists them with housing, personal health and relationships. They are required to give back through volunteer work or community service.

STRONG FOUNDATIONS

A CRUMBLING HUNDRED-YEAR-OLD HOUSE FOR RECOVERING ADDICTS UNDERGOES ITS OWN REHABILITATION WITH ECF’S HELP



A HISTORY OF THE HOUSE

1914-1923: The house is home to politician, feminist and activist Nellie McClung.

1955: The United Church's Division of Social Service wishes to be more active in alcoholism treatment, but wants to avoid duplicating existing Edmonton services. Plans to create an alternative recovery facility begin.

1959: An 11-bed residence known as United Church Hostel opens its doors to provide treatment for men recovering from alcoholism.

1964: United Church Hostel's board of directors purchases a two-storey house on 11229-100 Ave., allowing the organization to expand services to 14 beds. It's subsequently renamed Jellinek House after Dr. E.M. Jellinek, a scientist and pioneer in the field of alcoholism research and education, and former University of Alberta professor.

2011: Edmonton Community Foundation pitches in to save the crumbling Jellinek House with a \$30,000 grant for renovations that will ensure the facility can continue providing its invaluable services.

is actively engaged in the community as a worker, volunteer or student.

The objective is to remove the men from the triggers that might cause a relapse back to their unhealthy lifestyles. "If you return a fellow who is smoking crack or using heroin to the same social group he came from, chances are, just from pressure, he'll return to using," Rayner says. "When you get out of early recovery you have all of these really well thought out and idealistic plans to get back on your feet. But when you leave treatment you really have no foundation to move forward. We provide them a safe abstinence-based environment, where they can start going to school or work, or start spending time with family, and have a safe environment to return to, so that it takes away the shock from immediately coming out of treatment."

Chris Taylor is one such resident.

In July 2010 Taylor was arrested for stealing a car and selling crystal meth. He remained in custody until October, but the moment he was released he was back on the pipe. Within a few months, the police arrested him for breaching his curfew and the next six months of his life were spent at the Edmonton Remand Centre.

It looked like no one would give him another chance, but then, on his birthday, June 1, 2011, he received the gift of a lifetime: an addictions treatment centre took him in.

After a month spent cleaning up in Edmonton Drug Treatment & Community Restoration Court and Poundmakers Lodge, Taylor successfully applied for a room in Jellinek House, where he lives today.

"The hardest part was leaving all of my friends from my previous life," says Taylor. "But I just added my 98th contact to my new phone, and they are all sober people I met through meetings and volunteering in the community. Not only do I have a new network, but getting to see my son last Christmas Eve, after two and a half years, has been by far the best part of my new life."

Taylor doesn't just credit his sobriety to Jellinek, but also to the supportive neighbourhood that trusted him

enough to let him give back.

Nobody knows the value of such relationships like Sheldon Rayner, who began drinking at nine and doing recreational drugs at 16. By 20 he was a full-blown intravenous drug user. "My recovery has been trial by fire," he says. Without the support of good friends, he suspects he'd still be an addict, at best.

Kicking his habits also inspired him to pursue an education and career in addiction recovery. Over the last decade, he honed his skills in various areas of the field and then, in March 2011, took his current position with Jellinek House, which has provided a set of other challenges for him. Rayner isn't just responsible for helping build the house's metaphorical foundations. He's in charge of making sure the physical foundation of the house is sturdy, too.

As executive director, he's responsible for maintaining the property itself and, unfortunately, the 100-year-old house is falling apart.

When he started at Jellinek, he came across two sustainability reports. The first, from 2003, included details on the structure of the house and recommendations to bring it up to code. The second, from 2010, explained that the structural problems had worsened because of neglect of the first report.

Rayner pored over them and put together an itemized list of structural issues, ranging from a collapsing deck to a rotting fence and cracked driveway. However, the roof was most pressing. "It was leaking and when we started ripping it open we were finding huge gaps in the sheeting. There was no polly or tar paper laid down," Rayner recalls. "Well holy crap, no wonder it's leaking."

The bill for the renovations came to \$70,000. "Where do I get the money to fix everything? I don't have any background in fundraising; all of my background is in treatment," Rayner says. "It was time for me to start looking for grant money because I know it exists and that was the position I found myself in."

That's when Rayner decided to approach the

Edmonton Community Foundation. After all, the website said it would connect donors and charities to "help create and maintain a strong, vibrant community for generations to come."

Rayner may not have had experience with writing grant proposals, but he dove in head first. After researching ECF's application process, he filed his first attempt in July, but did it incorrectly. "I had pretty much written a novel," Rayner says, laughing. "I submitted it and got some great feedback from ECF."

Scott Graham, ECF's Director of Community Grants, remembers receiving the application. There were several technical issues that needed to be worked out, but a great case had been made for funds. Rayner provided a strong budget, an appropriate time frame and demonstrated that a one-time grant would indeed help Jellinek's ability to provide an essential service to the Edmonton community. As a result, Rayner's request became a front-runner in ECF's competitive process.

"We understood the importance of the services that Jellinek provides to people recovering from dependency issues, and in order to do that they need to maintain a functional building to house its residents," Graham says. "Though there were multiple issues with the application, we were happy to walk Mr. Rayner through the process — ECF staff are always just a phone call away."

Rayner rewrote the application and his request was accepted. Last September, Jellinek was awarded \$30,000 in funding with the expectation that the society would match the amount.

"ECF was absolutely helpful throughout the entire process. They answered any questions I had about the process. I probably could have used them more and saved myself a few steps, but they're absolutely fantastic. It's nice to know that there's an organization like ECF out there that's available to organizations out in the community."

In the end it's all about strengthening Edmonton by helping to develop upstanding, contributing members of society, says Rayner, and organizations like Jellinek play an important role in accomplishing that.

"We all deserve a chance," says resident Taylor. "It's houses like this that make everything possible, and we need more places like this to help get more people off the street and out of the lifestyle of addiction."

Taylor's next step is to enter a trade, possibly as an electrician. "Today I feel strong enough to make it after I leave Jellinek." ○

Spotlight on Funds

Four new channels of community giving made through Edmonton Community Foundation

At the heart of the reasons for establishing funds at ECF is the donors' desire to do "good." That's why ECF exists, to help donors invest their gifts in a way that allows for maximum returns to be re-invested in the community, whether through grants, scholarships or funding given directly to charitable organizations.

ECF funds are established in a variety of ways. Sometimes donors are referred by a financial adviser, lawyer, friends or family, and sometimes they just hear about it from other people with funds of their own.

There are more than 650 of them already, and more are established each year, such as these four examples.

Alberta Dental Association

& College Communities Assistance Fund

There are times when a foundation winds up its operations and ECF is named as its successor in order to ensure that the funds continue supporting a charitable cause. This is one such case. Assets from the Dentistry Canada Fund were relocated to ECF, and under its new name this fund assists Albertans who face barriers in accessing oral health services.

Bob Ward Social Enterprise Endowment Fund

Funds at ECF are often established to pay tribute to someone other than the donors. After Bob Ward, the first Executive Director of the Social Enterprise Fund, died suddenly last June, his friends and colleagues honoured the work he started by creating the Bob Ward Social Enterprise Endowment Fund to support the creation, expansion and maintenance of social enterprises. Visit socialenterprisefund.ca for more information.

Peter Shertel Fund

Many donors include gifts in their wills so that they can continue making a difference even after their own lifetimes. Peter Shertel left a generous portion of his estate to ECF to address his concern for those living in poverty. In accordance to his wishes, the Peter Shertel Fund provides ongoing support, now and forever, to help relieve poverty in the Edmonton area.

Edmonton Folk Music Festival Endowment Fund

Several non-profit organizations have established endowment funds at ECF as a way to ensure their financial sustainability. Folk Fest is just one of these organizations. Arts and culture organizations, like Folk Fest, that set up endowment funds can benefit from a federal government program called the Canada Cultural Investment Fund Endowment Incentives program, offered by Canadian Heritage, which matches donations to these organizations. To learn more about it, visit pch.gc.ca. ○



Locally Invested

Smart businesses know that it pays to give back

While running a successful company brings rewards and momentum for growth, Matthew Chao and Gary Weller know there's more to life. The founders of Abstractive Consulting Technology (ACT) opened for business in 2009 with the support of the University of Alberta's start-up program, TEC Edmonton. Hard work, key clients and good timing were a winning combination the first year.

The IT company that counts the Alberta Government's seniors services as a client worked hard to connect the paper world and the digital one. The five young, upstart employees were all shareholders, whose efforts brought good fortune and they were grateful. So grateful, in fact, that the company wanted to give something back. But how?

One employee knew about the work of Edmonton Community Foundation and arranged to meet with Karen Good, the Donor Services Advisor. "This was a young, dynamic group who were ready to make the world a better place," Good recalls. Last fall she helped the company set up a Donor

Advised Fund with an initial investment by the company of \$13,000.

Setting up a donor fund is easy, says Good. "It's shorter and quicker than a cell phone contract. The tricky part is determining the spirit of intent." With 80,000 charitable organizations in Canada, donors have to align their passions and values with the charities they care about most.

So, ACT formed an internal committee that meets a few times a year to give ECF direction on where the money goes. "There is minimal time invested for management and the impact is great for employee morale," says Weller. "You can be part of something bigger than yourself."

This year, ACT's financial support went to Youth Empowerment and Support Services (formerly Youth Emergency Shelter Society), Scouts Canada, Hope Mission and the Edmonton Christmas Bureau.

The beautiful thing about a Donor Advised Fund is that it keeps granting. The donations come from the earnings and it keeps giving in perpetuity, according to the mandate. Sustained giving is the

socially responsible thing to do, says Good.

In a competitive job market, the benefits are big. Altruism boosts the morale of current employees, while drawing the attention of potential talent and clients. Weller says the company believes in living up to its acronym by taking an "ACT-ive" role in the community where they work and live.

Planning for the future is important. You have to balance your desire for a better world with the need for financial security. "The bottom line isn't the only line," says Weller. "If our company continues to grow, we'll give more."

And the company is growing, now counting 16 employees, many of whom have young children and are proud to call themselves family-oriented. They are busy people too, but that hasn't stopped them from going beyond financial support to volunteering with organizations they care about, such as the Edmonton Police, and at cultural events like the local Chinese festival. At the end of the work day, they understand volunteering is an essential part of giving back to a community and transforming lives. ○

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feel good about your money.



Good Neighbours

2

Weigh Your Options.

LeBlanc debated whether he should work with an existing foundation, or strike out on his own. In the end, he went with ECF because of its reputation, resources and expertise.

4

Shape Your Fund.

If you're not as prepared as LeBlanc, don't worry. ECF can help you figure out how your money would be best spent and line you up to an organization with goals closely matching your own.

6

Get the Money.

Funds with ECF can be started with as little as \$10,000, either donated all at once or built over a period of up to 10 years. Approximately 3.5 per cent of the lump sum gets distributed every year, while the rest stays invested and gathers interest.

Donor Rick LeBlanc's story shows how you can start your own fund in 7 easy steps

It's a classic case of honouring thy neighbour. Rick LeBlanc lived in a St. Albert house next to John and Pauline Koroluk since the 1970s and, over the years, they became close friends. The Koroluks were old enough to be his parents, and in turn treated him like a son. As the couple got older, LeBlanc wanted to do something that would honour them as good neighbours and people. "I just wanted some way of keeping their names alive," he says. 1

LeBlanc thought about how supportive the Koroluks had been about his own work with Roots of Change, a Catholic organization that does relief work in Nicaragua, and decided to create a fund that would support the organization in his neighbours' name. But how could he make sure it would live on in perpetuity? 2 LeBlanc did some research. Then he got ECF on the phone. 3

LeBlanc didn't need any help shaping his idea into a practical, workable fund. 4 He already knew exactly how his was going to operate so, with the help of ECF, he drafted a formal agreement 5 and got to work.

Last fall, once the papers were all signed, and LeBlanc had the money together, 6 the John and Pauline Koroluk Fund was up and running. It ensures that disadvantaged Nicaraguans receive the benefits for years to come, with no maintenance required. 7

Although John passed away before he could see the fund in action, he was alive to hear about the idea and how it would unfold. LeBlanc recalls him being happy to hear it and, good neighbour that he was, supportive as ever. 0

1

Get the Idea.

Think of something that would make the world a better place, or just a cause that's important to you personally. Are there groups out there that already do this work? For ECF, as long as your money ultimately goes to a registered Canadian charity, the sky's the limit.

3

780-426-0015.

They've got a team of donor service associates waiting to help.

5

Make an Agreement.

This sets out in writing exactly how your fund will operate, where and to whom the money will be dispersed, along with any other nitty-gritty details.

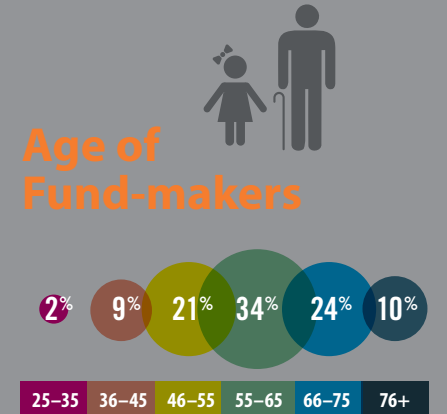
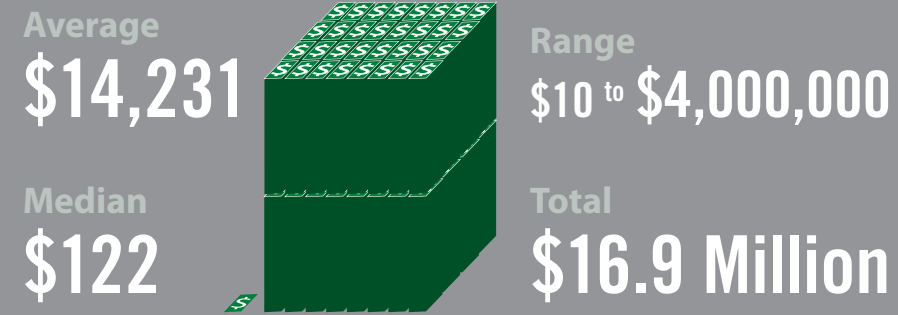
7

Housekeeping.

This part is completely up to you. Donors can add to the original balance; create new funds under the umbrella of the original; stay closely involved in how the money is distributed; or sit back and let ECF work its magic.

Edmonton Community Foundation: By the Numbers

Size of 2011 Donations



Emerging Issues

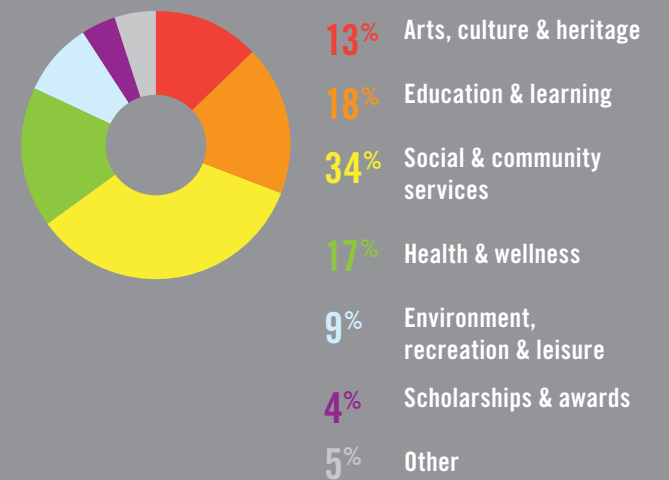
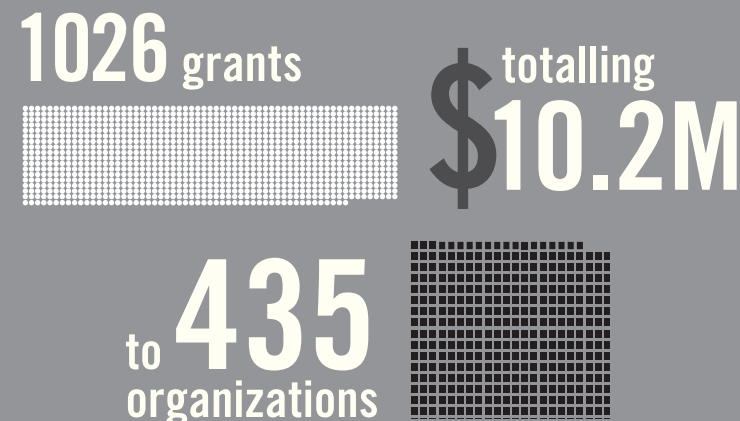
The growth of grants supporting immigrant services

Year	Direct	Indirect	Yearly Total
1990	\$0	\$58,000	\$58,000
1997	\$30,500	\$24,500	\$55,000
2005	\$113,500	\$98,387	\$211,887
2011	\$265,875	\$492,028	\$757,903

Power of Endowment

One-time donation (1990)	\$50,000
Balance on December 31, 2011	\$51,596
Amount given out in grants or scholarships	\$67,483

Non-scholarship Grants Given in 2011



For the most up-to-date financial statements visit ecfoundation.org

*Figures generated on April 1, 2012

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edmonton **artists'** **trust fund** awards

investing in edmonton artists

Since 1997 the Edmonton Community Foundation and the Edmonton Arts Council have invested in individual artists, encouraging them to stay in Edmonton's creative community by supporting a concentrated period of time to devote to career development.

Learn more at <http://grants.edmontonarts.ca/eatf>

Donations are welcome on an ongoing basis.