

LEGACY IN

S P R I N G
2 0 2 4

ACTION

YOU CAN DO HARD THINGS

Building future
female leaders
through sports

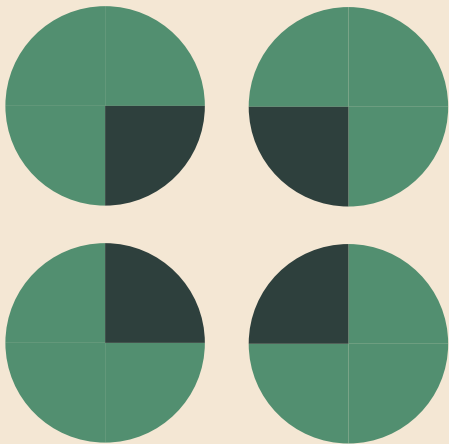
+
Generosity
Education

CENTRED

A first for Métis
students, and those
who want to learn
about Métis culture



Invested in Edmonton.



For over a decade, our Edmonton-based advisors have worked with the Edmonton Community Foundation to help our clients transform our intelligent investing strategies into charitable action.

CEO
Tina Thomas

**DIRECTOR, MARKETING &
COMMUNICATIONS**
Anna Alfonso

COMMUNICATIONS ASSOCIATE
Andrew Paul

EDMONTON COMMUNITY FOUNDATION
9910 103 St. NW
Edmonton, Alberta, Canada T5K 2V7
T 780.426.0015 F 780.425.0121

odvod publishing

odvod media

PUBLISHER
Trudy Callaghan

ODVOD PUBLISHING INC.
10221123 St. NW
Edmonton, Alberta, Canada T5N 1N3
T 780.451.1379 F 780.482.5417
odvodpublishing.com

DESIGN & PRODUCTION
Jomil Shah

MANAGING EDITOR
Jodi Glen

CONTRIBUTORS
Caroline Barlott, Bluefish Studios,
Lisa Catterall, Joelle Fagan, Caitlin
Hart, Keana Studios, Martin Kwame,
Theodora MacLeod, Jasleen Mahil,
Liam Newbigging, Andrew Paul,
Janice Saxon, Noreen Sibanda, Mat
Simpson, Aubrianna Snow

PRINTING
Mitchell Press

ODVOD MEDIA CORP.
odvod.com

No part of this publication may be reproduced without the written consent of the publisher and the organization, Edmonton Community Foundation. The views and opinions herein do not necessarily represent those of Odvod Media, Odvod Publishing, the publisher, Trudy Callaghan, or the organization, Edmonton Community Foundation.



Cover photo by Janice Saxon



8

5 FROM THE BOARD CHAIR

Monelle Sturko reflects on her time as Board Chair and the positive impact she's seen in the community

6 FOR MIND AND BODY

The Getting to Abundance program brings physical and mental wellness to African Caribbean women in high-stress roles

8
STEP UP!
Entrepreneurial women in the arts start or scale up their businesses with help from Action for Healthy Communities

10
WHEN WE BELONG
The Indo-Canadian Women's Association of Edmonton focuses on empowering newcomers from South Asian communities

12
WITH WORDS
A creative writing program gives the tools to Black women and girls to pursue projects, from books to podcasts

13
**FROM SPORTS,
COMES STRENGTH**
Jackie Fuga believes in the power of sports for young girls to grow into strong, empowered leaders

16
**UPHOLDING
AN IDENTITY**
Métis Albertans have a new space to celebrate their culture at NorQuest College

21
EXTRA CREDIT
A masterclass in making the most of tax season for you and your philanthropy

26
TAX TROUBLES
Budget 2023 proposed changes to the unfamiliar Alternative Minimum Tax, which could have had lasting effects on charities across Canada



16

29
IN OUR MEMORIES
Sandra Munn leaves a lasting impact on Edmonton's music community, and will be remembered for her contributions

30
A LOCAL LEGEND
Harlan Green, a farmer and a flautist, brought humour, kindness and music to our city



WARBURG PINCUS

Warburg Pincus is proud to support the

EDMONTON COMMUNITY FOUNDATION





MONELLE STURKO

Chair, Edmonton Community Foundation
Board of Directors

MESSAGE FROM THE BOARD CHAIR

It is a great privilege to write to you one last time as the Chair of the Board of Directors for Edmonton Community Foundation (ECF).

In meeting so many Edmontonians in my role as Chair, I am reminded continually of the impact ECF has on our city. We are Edmonton's largest non-governmental funder of the charitable sector. Every year, we provide more than \$30 million to thousands of charities and students. I am always moved when I hear how the work we support is changing lives in our city.

One of my favourite examples of this is YONA-Sistema. YONA was established in 2013 to provide free music-centred

programming for youth after school. It has served more than 200 young Edmontonians and Indigenous youth from the Alexander First Nation. The unique programming offered by YONA helps youth develop leadership skills and compassion with a focus on nurturing relationships rooted in mutual respect, trust and responsiveness. I am so proud that ECF has been able to support this work over the years. This is one of many stories that serves as a reminder that generosity and kindness matter.

I am thankful to have been involved in ECF's Social Enterprise Fund (SEF), which provides low-interest loans to businesses that prioritize social impact. In 2022, SEF played a key role in supporting the construction of a new facility for Connie Stacey's company, Grengine. Grengine's mission is to help solve global 'energy poverty' through sustainable alternatives to fossil fuel-burning generators. Her portable power source, also called a Grengine, can be powered by a range of different sources including solar energy, lithium ion and solid-state lithium batteries. This will play a key role in helping remote communities around the world access electricity with a lower carbon footprint.

The reason ECF can be so vital to our community is the people. I would like to thank the passionate donors who make our work possible. Stewarding your funds and visions for a bright future is a big responsibility. I cannot say enough about the dedicated team of staff, directors and our CEO, Tina Thomas. They are the centre of what occurs and translates into the grants, projects and fulfillment of dreams in our community. I would also like to thank our brilliant team of volunteers who sit on our granting committees. Your experience and knowledge are crucial to delivering support where it is needed most.

Finally, I would like to thank ECF's stellar Board of Directors. They are committed to governing ECF with grace and tenacity. Each of them brings such an elevated level of expertise in their given fields and a true commitment to the people of our community.

It has been the opportunity of a lifetime to chair ECF and to work hard for a community that I love. I look forward to seeing you out and about in this great city that we call home.



Getting together **THROUGH DANCE**

**A 10-WEEK PROGRAM HELPS MEMBERS OF THE AFRICAN
CARIBBEAN COMMUNITY DE-STRESS AND NETWORK**

BY **JOELLE FAGAN**

WITH THE PREVALENCE of hustle culture, it can become difficult to find time to unwind and de-stress. So, the Alberta Black Therapist Network (ABTN) partnered with Sangea Academy to organize the Getting to Abundance program, a series of dance classes intended to help promote wellness for African Caribbean women in leadership positions.

The program's development and operation was supported by Edmonton Community Foundation, which provided a \$5,900 BIPOC grant. The program started last September and concluded in November.

Bunkola Ojelade, an ABTN therapist who leads the somatic movements section of the session, believes that the program is a vital necessity because of the busy lives that many attendees lead. "Many of these women are mothers. Many of these women are students. Many of these women carry a lot of responsibilities," she says.

The two-hour sessions typically began with Ojelade leading attendees through somatic movements, exercises that help connect the physical body and the mind. "When you think [about] what your emotions are, and how that affects this turbulence in the body," says Ojelade. "We experience sensations that are pleasant or unpleasant, depending on how we interpret it."

After Ojelade led attendees through somatic movements, they did a dance routine led by Reckie Lloyd, the dance instructor and co-founder of Sangea Academy.

"I have to teach the dance movements step-by-step," says Lloyd, "breaking it down, and

then speeding it up as we go and then using those movements as our cardio, so we'll run it a few times over and over and over."

Lloyd, a former track-and-field athlete, incorporated training drills and body weight training into African dance. The dancing was accompanied by the African drum, an instrument that, in some cultures, has "healing powers in the rhythms because of their vibration," says Lloyd.

"This is not just a cultural program, but a human experience where everybody has a space to explore, to learn, to better themselves, to know another person and to release some tension."

– Reckie Lloyd, dance instructor and co-founder of Sangea Academy

The remaining 30 minutes allowed attendees to connect and network. While the attendees came from different professional fields and sectors, they found commonality and connection in the sessions. For some women, these sessions became a comfortable and safe space away from the hecticness of daily life.

"Because I saw, for many other women, that made such a difference in how they respond to stress and how they respond to the task in their day-to-day, right?" says Ojelade. "[And] having a place, a space to talk about it, and to put it in dance, put it in you know, in centring themselves. So, it kind of helped to ground many of the women, including myself."

Although Edmonton Community Foundation provided the funding for the 10-week operation period, both Lloyd and Ojelade look forward to potentially running sessions in the future. Lloyd believes that the program could benefit Edmontonians by bringing them together and encouraging them to share their experiences and culture with one another.

Lloyd says, "This is not just a cultural program, but a human experience where everybody has a space to explore, to learn, to better themselves, to know another person and to release some tension."

"It will make our city a lot better," he says. "A lot more people will get to know one another." ■



STEP UP!



HELPING WOMEN AT THE INTERSECTION OF ART AND BUSINESS

BY LIAM NEWBIGGING
PHOTOGRAPHY BLUEFISH STUDIOS

AS AN ARTIST, Areej Alazem is a student of the world. She's traveled throughout West Asia from her home in Syria to Qatar and Turkey. Thanks to digital technology and video calling, she's been able to learn art and calligraphy under teachers from China, London and most recently, Morocco. While her art journey has taken her across the globe, her journey as a student of business didn't start until she was in Edmonton and first walked through the doors of Action for Healthy Communities (AHC).

"It's a new world for me," she says. "I found it very interesting, very enjoyable. And as a newcomer, I dealt with some other organizations, but I found credibility here because I like how they work and follow up with you."

Since Alazem started in the Support for Traditional Enterprises Program (STEP) just over a year ago, she's attended regular classes on business financial

“IT’S NOT ONE BARRIER THAT THEY’RE FACING; IT’S MULTIFACETED BARRIERS AND WE WORK WITH THEM TO ADDRESS AND HELP ALLEVIATE MANY, IF NOT ALL, OF THEM THROUGH CAPACITY BUILDING AND PATHFINDING TO RELEVANT RESOURCES FOR THE BUSINESS ECOSYSTEM.”

– TULIN SADOUZAI



Areej Alazem

literacy and tailored one-on-one sessions. This has helped her gain knowledge, develop her social capital and build a business plan for her art business. Thanks to a \$50,000 grant from Edmonton Community Foundation (ECF), she and 25 other entrepreneurial women in the arts have learned important money skills and developed or scaled up their businesses.

The AHC enlists the expert tutelage of professional accountants and business counsellors like Kevin MacDonald and Kirsha Campbell, whom Alazem says was “the most valuable” to her. Now, Alazem has registered her business, become a member of Edmonton’s Chamber of Commerce and is finalizing the last stages of her business plan.

She plans to sell her art, show at galleries and eventually sell household decor and clothing inspired by her art. But her biggest goal, she says, is to open her own art school here in Edmonton. Support from STEP has helped her connect with art galleries, art councils and even other established Edmonton artists like Elsa Robinson.

“It’s not just looking for that business knowledge, but other supports that lift them up,” says Tulin Sadouzai, a Stakeholder Engagement Facilitator at AHC. “It’s not one barrier that they’re facing; it’s multifaceted barriers and we work with them to address and help alleviate many, if not all, of them through capacity building and pathfinding to relevant resources for the business ecosystem.”

Sadouzai says STEP was born out of a

previous program at AHC, which sought to give market exposure to newcomer entrepreneurs. But when reviewing the data for this program, Sadouzai noticed something concerning — women participants weren’t registering their businesses. Through follow-ups, the AHC Entrepreneurship program team found that many still felt they needed skills like business financial literacy to take their businesses to the next level.

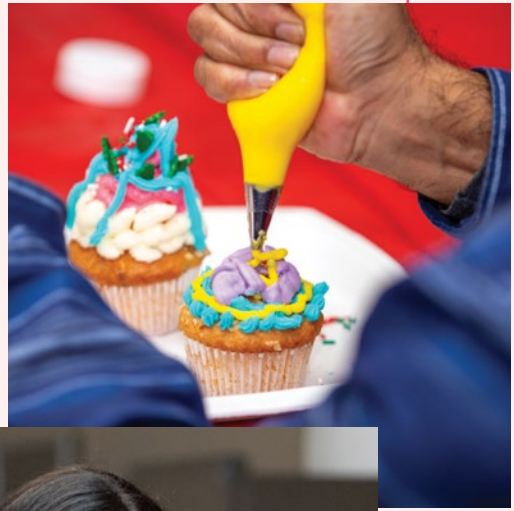
“That is how we applied for STEP,” Sadouzai says.

When asked about the support received from ECF, Sadouzai says it matters “a lot.” Since most of AHC’s operational funding comes from Immigration, Refugees and Citizenship Canada (IRCC), their funding is usually limited to providing services to permanent residents and refugees, not Canadian citizens.

“If [Alazem] gets her Canadian nationality, we’d just be her friends then. We wouldn’t be able to serve her. The funding from ECF gave us this much-needed flexibility that we can outreach to all Edmontonians,” Sadouzai says.

Alazem’s story is just one of the many clients AHC serves, mostly newcomers. Some may become Canadian citizens, and some may stay as permanent residents for some time, but all of them are community members who rely on AHC’s support.

Alazem says, “The nice thing is, here, if you ask for support, you will find it.” ■



SPEAKING THEIR LANGUAGE

One Step Towards Life program
welcomes South Asian newcomers

BY **JASLEEN MAHIL**

PHOTOGRAPHY **MARTIN KWAME**



The One Step Towards Life (Ek Kadam Jeevan Ki) program was created by the Indo-Canadian Women's Association of Edmonton (ICWA) in an effort to empower newcomers and immigrants within the South Asian community.

Through virtual and in-person classes, One Step Towards Life supports the physical and mental well-being of its participants. Activities include yoga, meditation, art classes, workshops on nutrition and presentations on financial literacy. It also organizes info sessions about community resources and services for seniors as well as health related topics like dental care. The program started in April of 2023, and runs until March 31, 2024.

One thing that sets One Step Towards Life apart from other programs aimed at helping newcomers to Edmonton is that it focuses on the needs of the South Asian community. Program Coordinator Vasudha Tiwari is fluent in Gujarati, Punjabi, Hindi and Urdu, which allows her to better communicate and connect with those participating in the program.

"You know everybody thinks in their own language. And they wanted someone where they don't need to think about the translation part, they can just share their feelings. And that happened only in their own language," says Tiwari.

Many participants of the program are seniors who are looking for community and a sense of belonging. The program celebrated its seniors on National Seniors Day by hosting a talent show and dinner. Participants showcased their singing and dancing, and 150 people attended.

COVID brought a growing sense of isolation for seniors, so events like this are important. "This was a way of making them feel welcome and engaged in the community. And it's been really, really

helpful, because there's a camaraderie among the people who attend our programs and (it's) nice to watch," says Jodi Zabłudowski, the executive director of the ICWA.

Edmonton Community Foundation (ECF) has been a proud supporter of ICWA and provided One Step Towards Life with a \$60,900 grant.

"We're so grateful to the Edmonton Community Foundation and for the assistance that we've received in the past and for this program. And it's made such a huge difference in the lives of people who participated in all our programs. Without ECF, this program would not have taken place. So, we are so thankful and grateful to ECF," explains Zabłudowski. ■

EMPOWERING DIVERSE VOICES

New program helps Black women put their experiences into words

BY LISA CATTERALL

TOWUNMI COKER SEES a lot of opportunity in education. As the founder of TC Initiative, Coker works to fill gaps she sees in the community, helping marginalized communities gain skills and knowledge in areas like finance, health and economic development.

“So the goal is to empower the greatest talents of Black women and girls,” she says.

TC Initiative partnered with the Africa Centre to receive a \$15,000 grant from Edmonton Community Foundation to support its latest offering: the EmpowerHER creative writing and mentorship program. The program is designed to amplify the voices of participants, giving them the words and skills needed to reach their goals.

“What we’re hoping to see is that creatives who are Black girls and women, that they have this platform to grow,” she says. “We give them the information, the tools, the access to materials and resources to make that happen.”

The program includes four weeks of educational sessions, offered in-person or online. Each lesson focuses on a different style of writing — from branding and business writing, to script or proposal writing.

“Some of these creatives, they’re interested

in doing podcasts, reviews on social media, publishing a book. Everything entails writing a story. So this program is geared towards giving them that skill, that platform and that educational access,” she says.

The program also includes a mentorship element to help participants build on the skills learned in class. The mentorship gives them the opportunities to work closely with creative professionals. Participants also get the chance to workshop their writing, comparing their progress from before and after the training sessions.

The program also goes one step further to help participants build confidence in their work, while also building connections in the community. Through a literary meet-and-greet event, participants can show off their newly refined skills while connecting with other members of the creative community.

“At the event, each participant can showcase one of their creative works – if it’s poetry, spoken word or whatever creative skill they have – to see the impact of the program,” Coker says.

“We’re hoping that through these workshops, we will be able to see more Black women and girls who are smashing it in the creative world.” ■

KEEPING GIRLS IN THE GAME

Fast and Female
program makes sure
that the athletes of
today will become the
leaders of tomorrow

By **Caitlin Hart**

Photography **Janice Saxon**





Sports were Jackie Fuga’s safe space as a teenager. When her brother, David, passed away, participating in sports kept her healthy and engaged socially.

“I leaned into sport in my time of tragedy and grief, because it was the one place I didn’t feel like I had to be sad. I was given permission to just be,” Fuga says.

Selecting Fast and Female to receive a \$4,515 grant from the David Fuga Memorial Fund at Edmonton Community Foundation was an easy choice for Fuga.

Fast and Female is a national charity founded in 2005 with a mission to empower girls through sport, physical activity and education.

“Their core values aligned with the David Fuga Fund core values of keeping adolescents in sports, but also personally and professionally, it just really resonated,” Fuga explains.

Not only were sports and physical fitness her passion as a teenager, they’ve become her career. Fuga is a physical education teacher who has seen first hand how sports make a difference in girl’s lives

— and how frequently they quit sports.

Girls drop out of sports at a much higher rate than boys — one in three girls by age 16, versus one in 19 boys. Keeping girls involved is valuable not only for their physical health, but their whole being, including mental health and even future career success.

“There’s a stat from Ernst & Young Global that 94 per cent of C-suite women executives were involved in sport and physical activity in their upbringing. It’s not just about being the best athlete but a holistic approach to your health and your personal development that will help you in your career as well,” Gabriela Estrada, Fast and Female’s executive director, says.

Estrada played sports as a girl, and went on to coach soccer and run fitness programs as an adult. But, she noticed the sports sector didn’t cater to women and girls, especially girls from different ethnic, religious or class backgrounds. Inspired to make a difference in the field, she began volunteering with Fast and Female before joining the staff.

“Can you imagine if all teenage girls were told, you can do whatever you want. You can do hard things and you’ve got a support network behind you. Just think of the different trajectory females would have growing up with that empowerment behind them.”

— Jackie Fuga

The organization empowers girls and women by pairing physical education with evidence-based curriculum covering topics from leadership to consent. Their in-person and online workshops, in partnership with local sports leagues, schools and other programs, offer a non-judgmental, safe space for girls to engage in sports. The programs also connect participants to REAL (relatable, empowered, active leaders) role models who range from athletes and coaches to kinesiology students and firefighters.

“There are great organizations out there that are community hubs, that know the youth in the community. We want to come in and partner with them and be the experts on girls in sport and physical activity, and elevate those female role models,” says Estrada.

This Edmonton Community Foundation grant will enable Fast and Female to run more of their programs in Edmonton, where Estrada says there’s already a huge amount of interest and engagement in the program.

For both Fuga and Estrada, sport is a lifelong passion. Enabling Fast and Female to expand their work in Edmonton means more girls will have the opportunity to have their lives enriched by sports.

“Can you imagine if all teenage girls were told, you can do whatever you want. You can do hard things and you’ve got a support network behind you. Just think of the different trajectory females would have growing up with that empowerment behind them,” Fuga says. ■



Rupertsland

is One of a



Skyler Wong acts as a voice between students, NorQuest College and Rupertsland Institute

Kind



A UNIQUE PARTNERSHIP CREATES A SPACE FOR MÉTIS STUDENTS, AND THOSE WHO WANT TO LEARN MORE ABOUT MÉTIS CULTURE

BY **CAROLINE BARLOTT**

PHOTOGRAPHY **MAT SIMPSON**

VIBRANT MÉTIS ART, ranging from beadwork to contemporary mixed media paintings, decorates the walls of the Rupertsland Métis Student Centre at NorQuest College.

In November, the centre opened its doors as the first Métis-specific student space within Canada. As a partnership between Rupertsland Institute (RLI) and NorQuest College, it's open to all post-secondary students. Métis students from any college or university can access RLI educational and funding support, while its METI-S (Métis Education Training Information Services) Advisors help with all the details. Meanwhile, all students — whether Métis or not — are also welcome to partake in events, learn about Métis culture through various resources, or use the centre as a quiet study space.

“It's only been in recent years that there have been Indigenous student centres. That's been a huge step towards reconciliation. But we were hearing from [Métis] students [through Rupertsland] that ... they just didn't see themselves reflected,” says Lisa Savill, Director of Métis Education and Post-Secondary Initiatives at RLI.

Meanwhile, through applications for the Belcourt Brousseau Métis Awards (BBMA) — endowments

overseen by Edmonton Community Foundation (ECF) — BBMA founders noticed a lack of Métis representation in post-secondary institutions and the work force.

RLI is an affiliate of the Métis Nation of Alberta with a vision of “a skilled, knowledgeable, and self-reliant Métis Nation,” as described on its website. The Rupertsland Métis Student Centre very much fits into that vision, says Savill.

NorQuest, RLI and the Métis Nation of Alberta entered into an endowment partnership in 2008 and today there is a \$1 million endowment in place for scholarships to Métis learners taking many programs through the college. NorQuest is the largest community college in Alberta — with a large number of Métis students. The college offered RLI its own space in a highly visible location. It was a natural fit, according to Savill.

“With over 200 years of resilient history, Métis students are being recognized and celebrated in school settings that have traditionally excluded their voices, states the Rupertsland Institute. “Though Métis students have been creating success in these systems for generations, authentic Métis stories have been dismissed in the narratives of being mixed (only part-Indigenous), or ▶



“The funding allowed me to focus on my schooling. I noticed a big increase in my grades”

– SKYLER WONG,
RLI Métis Student Services Centre Coordinator

not heard at all, as systems have taken pan-Indigenous approaches to serving Métis, Inuit and First Nations students.”

Historically, Métis people faced displacement and colonization; they faced forced assimilation, institutional denial of culture and discrimination. Art and clothing, often mislabelled as being from artists of other backgrounds, are only now being repatriated. Schools were not safe places for Indigenous children — including Métis — as attested by the many stories in the online RLI Métis Memories of Residential Schools resources.

But since the mid-1700s, Métis people had developed a distinct identity with their own strong and vibrant culture, languages and traditions. It’s a culture backed by strength and resilience. (RLI offers the public a chance to learn about Métis culture and history through Métis Foundational Knowledge Themes, which are free online books and a self-led virtual course.)

It’s the first day after winter break. The centre is quiet but students are busy socializing on the other side of the glass walls before their return to classes. One of those students enters the space for the

first time and Savill greets him.

After exploring, he mentions it would be great to hear some Métis music in the background.

“Great idea!” Savill says. Fiddle music is an integral aspect of Métis culture, combining Indigenous and often Scottish or French-Canadian rhythms to create a unique sound. And, Savill says, the centre is designed by students so it makes sense to welcome these ideas.

Skyler Wong is the RLI Métis Student Services Centre Coordinator and worked with a group of interns — he originally was one as well — on the centre concept, the interior design, as well as the exterior graphics. Having students front and centre in the concept and inception was key, he says.

Now, Wong helps run the centre by acting as a voice between students, RLI and NorQuest. Advisors help students navigate RLI funding and whatever resources are needed including tutoring support, emergency funding and technology supports.

As a MacEwan University student, Wong received RLI funding that drastically improved his experience

on campus. Previously he had been working full time while trying to juggle a part time schedule.

“The funding allowed me to focus on my schooling. I noticed a big increase in my grades,” says Wong. “It took the stress off my parents, as well.”

Now Wong is happy to share those resources with others in a space dedicated to Métis culture.

Many non-Indigenous people who come to the centre, says Wong, are interested in unique elements of Métis culture. “They say they didn’t know any of this stuff, because sometimes it’s not fully taught,” he says.

There is a small room connected to the main space with a table — that features a giant Red River Cart wheel. It’s where students can study or relax. Red River carts were used by Métis people during the mid to late 1800s to carry loads long distances and they are just one aspect of Métis culture that shows the group’s resourcefulness, says Savill.

Beautiful decorative sashes — one hangs across a bookshelf at the centre — were worn by women who used them to carry their babies, hold and mend things. Men also wore the sashes to carry items to keep their hands free for other work tasks. The loose threads of what looks

like decorative tassels were used as threads to mend broken clothing pieces along their travels. Today sashes are generally worn as symbolic pride of the Métis.

Sharing those pieces of culture with those who come to the centre is a point of pride.

“It’s not a big space,” says Donna Bell, who is a member of ECF’s BBMA panel, RLI Vice Chair Board of Governors and Manager of Indigenous Relations and Support at NorQuest’s Student Services department, “But it is significant in the sense that we have a lot of hopes and aspirations for what it looks like.”

One of those hopes is to join forces with the Indigenous Student Centre at NorQuest, says Bell.

“That way people can actually see the beauty of working together collaboratively but also see all the nuances and differences between the groups.”

Bell’s work with ECF’s BBMAs has allowed her to help many Métis students receive funding with criteria based upon community involvement and need rather than grades.

“It was important to the founders how these folks are currently contributing to the community, and what are they doing to be active

participants,” says Bell. “Because that’s what being a Métis person is about — it’s that reciprocity.”

The founders of the BBMAs were a group of Métis men who wanted to give back. They saw gaps in opportunities for Métis people to receive education and skills development. “They were met with a lot of resistance ... but they pushed back and now the BBMAs have a very healthy endowment,” says Bell.

While BBMAs and Rupertsland funding are completely separate entities, students can potentially access both. And they both can make a huge difference in the ability of students to complete their education with less stress.

Bell says she hopes the Rupertsland centre sets a trend for other institutions to support the education of all Indigenous people in a meaningful and tangible way.

“When you have that community that has your back when you don’t think you have the gumption or skill sets to move forward, that’s really important,” she says. “It really is living our ancestors’ dreams of where we would be in the future... that we would exist and actually be who we authentically are as a culture.” ■



Northleaf

PRIVATE EQUITY | PRIVATE CREDIT | INFRASTRUCTURE

We are pleased to support
the Edmonton Community
Foundation.

Northleaf Capital Partners is a global private markets investment firm focused on mid-market companies and assets. We serve some of the world's leading institutional investors and family offices.

www.northleafcapital.com

TORONTO | CHICAGO | LONDON | LOS ANGELES | MELBOURNE | MENLO PARK | MONTREAL | NEW YORK



Image Supplied

Noel Xavier

Director of Philanthropy & Donor Engagement

INSIGHTS, TOOLS AND LEARNINGS FOR DONORS

Creating a thriving city for everyone relies on the crucial role of philanthropy. Donors aspire to make a meaningful impact on the charitable causes close to their hearts. Whether you've been a donor for years or are new to Edmonton Community Foundation (ECF), we're thrilled for you to learn more with our inaugural Generosity Education section in *Legacy in Action*.

In each issue, you'll hear from experts who will share insightful perspectives about charitable giving and the philanthropic sector. This marks a significant step in our broader initiative to provide donors with practical knowledge, empowering them to make informed decisions about their community support.

As tax season unfolds, our focus shifts to key elements that can turn this time of year into a win-win for you and your preferred causes. In the following pages, we'll discuss the tax benefits of different ways of giving, with input from financial planning experts. We'll hear from ECF donors who are putting these tools to work. And we'll look at how proposed changes to Canadian tax legislation could affect your philanthropic efforts.

We hope you find this information helpful, and we encourage you to discuss these topics with your financial advisors.

We would also like to hear from you. We invite you to share the topics or areas of philanthropy you wish to explore further. Together, let's enhance our understanding and impact in the world of giving. ■

PHILANTHROPY UNVEILED



Image Supplied



ASK THE EXPERT:

Donating Publicly Traded Securities

Cary Williams

Certified Financial Planner & Portfolio Manager

WITH THE ARRIVAL of spring comes that other annual ritual... tax season.

Though tax season is rarely anyone's favourite time of year (sorry accounting friends), it presents a great opportunity to support Canadian charities. Understanding the benefits of the tax treatment of donations can enable even larger donations to the charities that matter most to you.

One example of tax-efficient donations is publicly listed securities, which are eligible for special tax treatment when used for charitable giving. For donation purposes, the most common investments that qualify include shares that are listed on a prescribed stock exchange (such as the Toronto

Stock Exchange) or units of a Canadian public mutual fund corporation or trust.

To help us understand the value of tax-efficient donations, we reached out to a friend of ECF, Cary Williams. Williams is a certified financial planner, a registered portfolio manager in Alberta, British Columbia, Saskatchewan and Ontario, and co-owner of Edmonton-based independent wealth advisory firm North Road Investment Counsel. With 15 years of experience advising high-net-worth families on investing and charitable giving, he is the ideal person to explain the process of donating securities.

ECF: What are the benefits of donating securities instead of cash gifts?

CW: Currently, Canadians are allowed to donate qualified securities that have gone up in value (otherwise known as securities with an unrealized or “accrued” capital gain). This is the key. If we sell that investment and pay tax on the gain, we have fewer dollars to donate. However, if we donate the investment to a registered charity, capital gain and all, we can maximize our charitable dollars and our charitable tax credits.

ECF: How does the process of donating securities work?

CW: While it might sound intimidating, the process is quite simple. I recommend donors reach out to their charity of choice and/or their financial advisor to work through the process, but the basics steps are:

- ➔ Decide on the total value you want to donate.
- ➔ Review your taxable investment accounts and decide which securities you will donate. Typically, the security with the largest gain in percentage terms makes the most sense.
- ➔ Fill out the appropriate paperwork. This is often a Securities Donation Form from the charity, and a Letter of Direction form authorizing your financial advisor to initiate the transfer of securities.
- ➔ The charity should take care of the rest. After the charity receives the transfer, it will sell the securities and send the donor a charitable tax receipt.

ECF: Why should families ask their financial advisors about donating securities?










CW: I would highly recommend that families discuss charitable giving with their advisors. Advisors want to do great work that improves their clients’ lives, as well as their communities. Most financial advisors would be thrilled to hear about the charities that are important to you. That being said, advisors often specialize in different strategies and niches. In case your advisor isn’t as comfortable with this type of planning, I would also recommend discussing charitable giving goals with your accountant. There can be nuances to the tax treatments of donations, such as alternative minimum tax (AMT). Ensuring your accountant knows your plans and goals will help boost the impact of your donations.

ECF: Why are these conversations important?

CW: Right now, charities in Canada need as much help as they can get. Most data are indicating that Canadians are reducing charitable donations, while the needs supported by charities are continuing to increase. Utilizing the tax code to maximize our donations is one way to get more dollars into the hands of important charities. ■



Ensuring your accountant knows your plans and goals will help boost the impact of your donations.

	Cash Donation (Sell Then Donate)	Securities Donation
Purchase Amount (Book Value) 	\$5,000	\$5,000
Investment Growth 	100%	100%
Current Value (Market Value) 	\$10,000	\$10,000
Total Capital Gain 	\$5,000	\$5,000
Taxable Portion of Capital Gain (50%) 	\$2,500	\$2,500
Tax on Sale of Shares (48%) 	\$1,200 	\$0
Donation Amount After Tax	\$8,800 	\$10,000 



The Family Advantage

The right plan allows the Detheridges to make the most out of their philanthropy

By Andrew Paul



Image Supplied

Kathy and Kelly Detheridge

GIVING BACK TO the community is a value that Kelly and Kathy Detheridge learned as children.

Growing up in Ontario and Montreal, respectively, they lived by the rule of loving thy neighbour. This value was strengthened when they met in 1980, got married and had three children of their own.

“Volunteerism and supporting the community through philanthropy is very important,” Kathy says. “It’s always been an important aspect of life.”

Initially supporting local charities such as the United Way and the Centre for Family Literacy Society of Alberta, Kelly’s success in Alberta’s energy sector prompted the need for a more impactful giving model.

They spoke with Marshall McAlister, their portfolio manager at North Road Investment Counsel, and he suggested opening an endowment at Edmonton Community Foundation (ECF).

“I love helping our business owners like Kelly and Kathy figure out how to provide more to charities,” McAlister says.

Not only could this help them achieve their larger charitable goals, but it would establish a lasting family legacy in the process. They were intrigued.

“We like the legacy aspect of it,” Kelly says.

Endowments begin granting when they reach \$10,000 and families can take up to 10 years to reach this amount. Gifts to the fund are invested and every year a portion of the value of the fund is granted to charities of the donor’s choice. The rest is reinvested, growing the fund so that it provides support in perpetuity.

On December 8, 2015, Kelly and Kathy opened the Detheridge Family Fund at ECF with a gift of \$7,000. Since then, the balance of the fund has grown exponentially and

granted more than \$100,000.

“We get together as a family in the fall and discuss where we would like money to go,” explains Kathy. Over the years, they have provided 77 grants to charities including the Pigeon Lake Watershed Association, Youth Emergency Shelter Society of Edmonton and Centre for Autism Services Alberta.

There are also tax advantages to donating gifts like stocks from publicly traded companies.

“I’ve always thought that individuals and corporations that have the means also have a responsibility to give back to the community that’s helped us to be successful.”

– Kelly Detheridge

Kelly worked with McAlister to optimize his philanthropy, using his corporation, Detheridge Investments Ltd., to donate appreciated publicly traded stocks.

“Successful business owners with appreciated securities have a unique opportunity to give through their corporate investment accounts,” McAlister explains. “When an appreciated security is gifted, we can use the full value of the securities as a charitable donation and avoid capital gains taxes and get an increase to the Capital Dividend Account balance in the corporation. It’s an efficient way to get money to charity, and cash out of a corporation.”

But at the end of the day, it all comes down to their family values.

“I’ve always thought that individuals and corporations that have the means also have a responsibility to give back to the community that’s helped us to be successful,” Kelly says. ■



YOU CAN START A FUND, TOO!

Work with Edmonton Community Foundation (ECF) to ensure your charitable giving is set up for long-term growth.

MAKE A DIFFERENCE in your community. Edmonton Community Foundation (ECF) can help ensure your charitable giving is set-up for long term growth and greater impact.

You can set up an endowment fund that provides a permanent investment of charitable gifts. You can determine your philanthropic wishes; decide what you want to accomplish; and define the legacy you want to leave. You can set up your fund for yourself, your family or your business!

It's up to you. Here's how it works:



STEP 1

Speak with one of our philanthropy advisors about your charitable interests to determine which fund options are right for you. You can choose to support important causes locally, nationally, or around the world.

STEP 2

Once you've defined the objective of your fund, we'll create an agreement that captures your intentions. It's a straightforward document that explains the goal of your fund, how involved you would like to be in allocating grants, and other relevant details. There's no obligation for you during this process — we simply want to ensure we've documented your wishes correctly.

STEP 3

It's time to make your gift. You can create your endowment with \$10,000 – donated all at once, or you can build to this granting threshold over time. This flexibility allows you, your family, staff or clients the opportunity to contribute to the fund in a meaningful way.

STEP 4

When your fund is ready to grant, your level of involvement going forward is your choice. You could seek input from your family. Many businesses include employees or clients in deciding what causes to support each year. This becomes a powerful tool to showcase your commitment to what matters. You can also get creative with future fundraising efforts like special events, golf tournaments, or corporate matching programs. ■

You make the decisions. We provide the information.

To learn more, visit ecfoundation.org.



The Cost *of* Giving

Proposed changes to the alternative minimum tax raise alarm bells in the charitable sector

When the federal government tabled its most recent budget in March 2023, the collective eyes of the charity sector were drawn to proposed amendments to a little-known feature of Canada’s Income Tax Act: the “alternative minimum tax” or AMT.

While AMT has existed for decades, most individuals are not aware of it because it has not affected them.

AMT is an automatic mandatory alternative calculation of a person’s tax obligation using a different tax rate and different exemptions. If there is a difference between the AMT and tax calculated the more familiar way, the taxpayer is required to pay the higher value. In most cases, AMT is lower than the usual tax calculation, so a person is not even aware of it.

While Budget 2023 proposed increasing the AMT exempt annual income to \$173,000, charities are concerned about proposed changes regarding gifts of publicly traded securities and the charitable donation tax credit associated with them. But, it was not included in the 2023 budget — though there are fears it could emerge again in 2024.

In short, the proposed changes to the AMT calculation would include 30 per cent of the capital gain that is inherent in gifts of publicly traded securities; it would exclude 50 per cent of the taxpayer’s usual charitable donation tax credits.

The changes have been framed as addressing lower than projected government revenues by taxing those typically thought to benefit from tax-preference items. But charities are concerned that they could also negatively impact charitable giving.

“The concern that I have is how [the proposed changes] may impact our donors who have been longtime supporters and have made donations to us over the years,” says Edmonton Area Land Trust (EALT) Executive





ILLUSTRATION KEARA STUDIO

“THE IMPLICATIONS OF THESE PROPOSED CHANGES ON EDMONTON’S CHARITABLE SECTOR AS A WHOLE IS CONCERNING.”

– KATHY HAWKESWORTH

Director Sheila Campbell. As the region’s premier conservation land trust, the EALT benefits greatly from securities-based donations to support its work in acquiring and stewarding natural areas in and around the metro region.

Those concerns are shared by granting bodies like Edmonton Community Foundation (ECF), that holds endowment funds supporting EALT. ECF receives a significant portion of its support from securities-based donations.

“The implications of these proposed changes on Edmonton’s charitable sector as a whole is concerning,” says ECF Counsel and Philanthropy Advisor, Kathy Hawkesworth. “Currently the Foundation stewards more than 1,600 funds and close to 25 per cent of the donations it receives are from publicly traded securities. From 2020 through 2023, ECF received approximately \$35.8 million through these types of gifts.”

“If the proposed changes to the AMT are adopted, our communities will feel the impact, not just now but for years to come,” Hawkesworth adds.

Philanthropists like Marg Reine — who was one of the founding members of the EALT and helped establish the EALT Russell/Reine Family Conservation Fund through ECF in 2011 — are also concerned that too much focus is being put on government revenues and not the long-term impacts on charitable services.

“The funding that’s being given by the supposed ‘ultra rich’ are supporting social programs, literacy programs, grants for Indigenous communities, education and other social issues,” Reine says. “Should these

donations start falling off, then it’s not just the donors that are affected, but all those charities as well. And over three or four years, you’ll really start to notice the difference.”

According to Imagine Canada, the nonprofit sector contributes more than \$190 billion to the Canadian economy (8.3 per cent of the country’s GDP) and employs over 2 million people. In every city, many of the core services — whether it’s social services or education or arts and culture — are provided through the nonprofit sector.

Campbell and Reine are not alone in expressing their concerns, with many charities lobbying the federal government to reconsider the proposal.

“I don’t think there was any intent by the federal government to negatively impact the charitable sector, but, because they didn’t consult with anybody to get a good understanding of what the impact would be, all these charities across the country had to mobilize and advocate to stop it,” says ECF CEO Tina Thomas, who was among the leaders who spoke to MPs on Nonprofit Hill Day in Ottawa this past September.

Thomas notes that a lack of representation and consultation with the nonprofit sector in government leads to another issue.

“Because the charitable sector doesn’t have a seat at the table, we are forced to divert time and resources away from the work we were set up to do,” she says. “Instead of focusing on our community work, we are using resources to rally and advocate instead.” ■

A Musical Life

Remembering Sandra Munn

By **Aubrianna Snow**



Image Supplied

THE EDMONTON VIRTUOSO leaves behind a legacy of care and camaraderie.

Trailblazer. Inspiring. Motivating. These were just a few of the words used to describe Alexandra (Sandra) Munn by those who knew her. A lifelong musical prodigy and change maker in the Alberta music scene, Munn built an incredible legacy based on education and excellence. She passed away on Sept. 30, 2023 at age 89.

“Sandra leaves a legacy through her students,” says Mary-Lou Cleveland, her colleague and close friend. “Her gift of loving music has been seeded across Canada and the United States through students who are conductors, performers, accompanists, singers, teachers, composers and many are just people who want to enjoy playing and supporting the arts.”

Munn was born in Calgary in 1934 and her musical talent was quickly apparent in her perfect pitch and exceptional sight-reading. She moved to Edmonton to study before leaving to attend the world-famous music school in New York City, Juilliard, in 1953. There, she completed a four-year program in two years.

Following her graduation from Juilliard, Munn returned to Alberta to be with her family. She began teaching at the University of Alberta.

Her engagement with Edmonton’s

music community also extended far beyond campus borders. She conducted the Richard Eaton Singers as well as Da Camera Singers, taught privately, and was a dedicated patron of local arts.

Her teachings reached countless students in the Edmonton area who have now also found success in the music world. She also founded the Alexandra M. Munn Scholarship Fund at Edmonton Community Foundation (ECF) to support highly talented Edmonton-area students studying classical music in the area of voice and traditional orchestral instruments.

The singular purpose of the fund is to encourage students ages 11 to 15 in need of financial aid to pursue studies leading to a potential career. This program was just one of Munn’s ways of giving back to her community after having received scholarships herself early in her career.

“Sandra was an absolute joy to work with on our student awards for music,” Anna Opryshko, ECF’s Student Awards Associate says. “Edmonton’s classical music community was fortunate to have such a tireless supporter both onstage and behind the scenes.”

During her life, Munn also volunteered on other committees at ECF including the Winspear Fund Scholarships for Advanced Classical Music and the Ranald & Vera Shean

Memorial Scholarships.

In total, these three programs have provided \$2.6 million through 654 student awards to nearly 200 students — and it was always about the students for Munn.

“She would talk about the music and play through things with me and just get me excited about the pieces I was playing,” says Amanda Andrishak, a student of Munn’s and two-time recipient of the Alexandra M. Munn Scholarship. “I’m a musician now — I play piano for a living.”

Munn was well known for her commitment to building community. She often hosted gatherings to play music and kept in touch with a wide range of people from across the globe. A chance to see some of her impact came in the fall of 2022 with a trip out of town to hear a concerto.

“Everybody who knew her came over and chatted with her and reminisced and it was the best gift she could have ever had,” says Cleveland. “She realized that she did make a difference to a lot of people.”

While the impact of this loss will be felt tremendously by the Edmonton music community, Munn’s work lives on through the many musicians she mentored over the course of her life.

“I don’t think I would be here without her,” says Andrishak. ■

Local Flautist's

Legacy lives on

HARLAN GREEN, BEARER OF JOY TO THE EDMONTON MUSIC COMMUNITY IN LIFE AND DEATH

BY THEODORA MACLEOD



Images Supplied

JOHN MAHON STILL remembers the first time he met Harlan Green in the mid 1970s. “You’d notice his eyes right away,” Mahon says. “They twinkled.”

Green, former principal flautist for the Edmonton Symphony Orchestra passed away in 2008, but, 15 years later, the legacy of his warmth, humour and kindness lives on with as much laudability as his musicianship. “He used to kind of lean towards you when you were talking to him, like he was really interested in what you were saying. He didn’t interrupt you,” Mahon recalls. “Harlan was good, but he was always a nice guy. He was unpretentious... musicians can sometimes be egotistical, but Harlan was never that way.”

Raised in Dewberry — 200 kilometres east of Edmonton — Green was known as a man of integrity. A wildly talented flautist and a competent farmer, he split his time between the stage and his family farm. It was there that Harlan was first introduced to music, taught by his sister, Muriel.

Green studied under many great masters, including Julius Baker

(New York Philharmonic Orchestra), and Geoffrey Gilbert (London Philharmonic Orchestra). In 1945, at just 15 years old, Green joined what would eventually become known as the Edmonton Symphony Orchestra (ESO). His career with the ESO spanned 40 years, for most of which he sported a signature beard that fellow Symphony member George Andrix says was not something commonly seen on classical musicians at the time, and wasn’t always appreciated by conductors. According to Mahon, when conductor Pierre Héту joined the ESO as the artistic director in the mid 1970s, Green was forced to audition for his position — something he did successfully— though whether that was in response to the unconventional beard can only be speculated upon.

Throughout his career, Green played in a number of ensembles outside the Edmonton Symphony Orchestra, including the Harlan Green Players — a wind quartet — the Trocadero Orchestra — playing big band saxophone — and The Plumbers Union, an eclectic recorder ensemble for which Andrix

composed. The recorder ensemble got its name because, according to Harlan, they were playing pipes, just like plumbers.

This lighthearted and punny humour embodies the man Harlan Green was and is also reflected in the title of his solo album, *In His Field*, a nod to Harlan’s roles as a farmer and a musician, where he was out standing and outstanding, respectively. The album was released in 1998 and produced by John Mahon, and features Janet Scott Hoyt accompanying on a piano formerly owned by Glenn Gould.

“He was thinking of the audience. He’s a good player, he could have picked really impressive, hard pieces to listen to... every piece he picked he wanted to connect with the audience,” says Mahon.

Harlan’s widow, Mara, arranged an endowment fund with Edmonton Community Foundation (ECF) to help support the education of Edmonton’s future generations of musicians. With an emphasis on eclectic styles and enhancing music culture, the grant aims to reflect the whimsy and joy of a man who was beloved by so many. At the request of Mara, the fund has remained anonymous, however, it was her wish that upon her death, the fund be publicly renamed to recognize Harlan Green. As we mourn the death of Mara Green, ECF is proud to announce the Harlan Green Endowment Fund. ■



Student Awards

Unlock the Opportunities

ECF offers a range of scholarships and bursaries to help students achieve their educational goals.



Learn more: ecfoundation.org/student-awards

EDMONTON
COMMUNITY
FOUNDATION

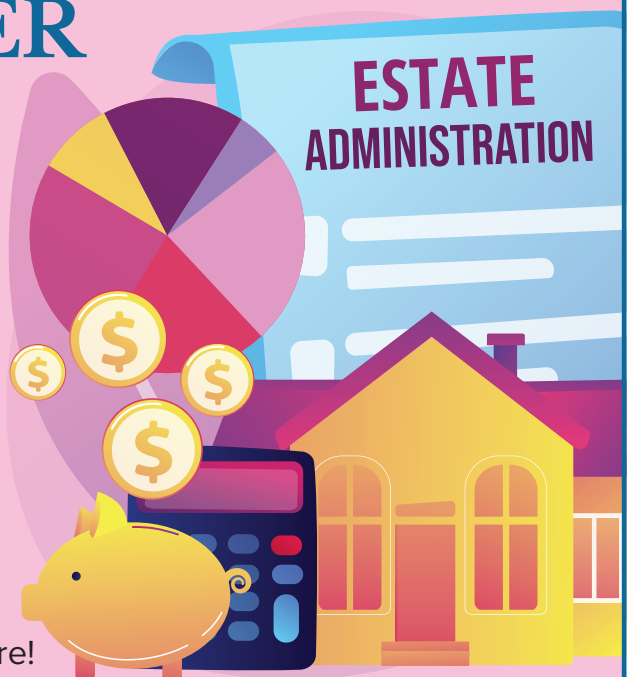
ESTATE POWER

Learn the fundamentals of estate administration

April 15-19, 2024

Estate Power is a series of free presentations about effectively administering an estate.

Join our dedicated team of volunteer estate lawyers to learn about being an efficient executor, tax implications, accounting procedures and so much more!



For the schedule, visit: ecfoundation.org/estatepower

EDMONTON
COMMUNITY
FOUNDATION



AGILITY. INSIGHT. PERFORMANCE.

Three properties that define us.

The quality of a real estate investment portfolio is a reflection of the core qualities your investment manager brings to the table.

Canadian Urban Limited is structured to capitalize on the mid-market commercial properties that many firms overlook. It is a reason why **our funds consistently deliver returns in the top quartile** in our peer group.

Learn why Canadian Urban is the choice to handle all your real estate investment needs:

- Investment Management
- Asset Management
- Property Management
- Portfolio Solutions
- Development

Contact us today!

www.CanadianUrban.com

Edmonton: 10572 105 Street NW, Edmonton, AB, T5H 2W7
Toronto: Suite 220, 600 Cochrane Drive, Markham, ON, L3R 5K3

780.424.7722
416.367.1300