



COMMUNITY CONNECTIONS

Spring-Summer 2008
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community foundation of medicine hat and southeastern alberta **newsletter**

chair's reception a hit!



by Maureen Roberts

December 6 saw close to 100 Board Members, volunteers, donors, grant recipients and staff gather at the Esplanade for the Chair's Reception.

Held annually, the Chair's Reception recognizes the continued support of the Foundation's generous donors and to publicly announce the Fall grant recipients. One of the main aims of the reception is to provide an opportunity for donors and volunteers to meet with the grant recipients and perhaps learn more about their important work in the community.

The Community Foundation's Executive Director, Mike Christie was pleased to see how many people took the time to attend the event.

"The number and diversity of grants awarded is a positive reflection on the community. Good job Community Foundation, donors and volunteers!"



Developing permanent endowments
Making responsible grants
Inspiring community leadership



2007 fall grants awarded...

- Kidsport (Canadian Council of Provincial & Territorial Sport Federation) **\$5,000**
- McMan Youth, Family & Community Services **\$7,500**
- Brooks Food Bank **\$15,000**
- Camp McCoy Association (Elkwater) **\$24,836**
- Alzheimer Society of Alberta & NWT **\$1,478**
- University of Lethbridge **\$3,000**
- Saamis Immigration Services Association **\$4,000**
- Clients Ongoing Rehabilitation and Equality Association (CORE) **\$7,500**
- Fifth Avenue Memorial United Church **\$2,857**
- Scouts Canada – Chinook Council **\$3,500**

"Good job Community Foundation donors and volunteers!"

- Mike Christie

goodbye kathy!

by Linda Lehr

Once again the Community Foundation will be saying goodbye to another wonderful community leader as Chair of the Board of Directors, Kathy Mandeville, fulfills her term. In addition to serving as Chair for the past three years, Kathy was previously Chair of the Grants Committee.

Kathy has her roots in the rural community and has lived and worked in different parts of Southeastern Alberta. Kathy has a keen interest in our community and is always well informed and knowledgeable which she uses to good effect through her strong leadership skills.

I recently chatted with Kathy, and these are some of her thoughts about the Community Foundation...

Linda: Kathy how do you feel the Community Foundation enhances our community?

Kathy: A great advantage that the Community Foundation brings to the community is the ability to distribute funds to a wide variety of community organizations. We are not restricted by any specific field of interest, so as long as the group is a charitable organization, and as long as the Community Foundation feels it is a worthwhile project, we can provide some funding. We have given funding to a wide variety of groups within southeast Alberta - from Medicine Hat to Hanna to Foremost to Oyen to Brooks and back to Medicine Hat. The projects have been related to sports, kids, support services for the underprivileged, arts and music, teen activities, community buildings.....

Another advantage is that it allows

our donors to donate to one organization and have many organizations benefit from it. And, they benefit in perpetuity. It allows the donors a more simple method of distributing their charitable donations and knowing that their money will be invested and 99% of the return on that investment will be distributed on their behalf. That will happen every year from the time they make their donation and will continue happening without them having to do anything else.

Linda: Kathy you have spent a lot of your term on our board with the grants committee. What challenges do you see ahead for the grants committee and how should they be addressed?

Kathy: The grants committee is facing the challenge of the fallen market place. As all investors know, the market has not been strong for the last several months and as such, the investment income is not there to make our usual grants to the organizations that will be making applications to us for funding. Undoubtedly the market will become stronger, but we don't know how long until that happens, and we don't know how much it will come back, so in the meantime, the grants committee will have to decide what approach to take with the current grant cycle.

Linda: You have been the chair of the Community Foundation for the past 3 years. As with any organization, board members are essential to the organization. What do you feel is a real draw for prospective board members to our organization over others?

Kathy: We are very fortunate to be



Kathy Mandeville

able to live in such a prosperous country and province and city. Because we have been given so much, it is important that we take the time to give back to the community. One way is to volunteer and one of the many things to volunteer for is the Board of Directors for the Community Foundation or any other local organization. Directors on the Community Foundation can only hold two, 3-year terms, and then the position must be filled by another community member. The advantage to this is that there is always a new mix in the group with new ideas about what works best for the Foundation. It is important to have a broad cross section of members from the region, so they can bring different perspectives from different regional areas and different walks of life. Everyone in the community has something to give, and the Community Foundation is a great place to be able to give.

Kathy has given a great amount to our board through her knowledge of our community and her caring to see that Southeastern Alberta has a strong future. She will be missed and everyone connected with the Foundation wishes Kathy and Ben all the best in their new adventures.

As many readers will be aware the first Vital Signs publication released in October 2007 was a great success. Preparation for Vital Signs 2008 has already started.

Get Involved

...be part of Vital Signs 2008!

Would you like to be involved? Do you have an opinion how we're doing here in Medicine Hat?

Participation is easy and will only take 10 to 15 minutes to complete. We are looking for volunteers to take part in an online survey to grade the quality of life indicators chosen for 2008.

Sign up now to be part of Vital Signs 2008. All we need is your name and an e-mail address. We will then send you the information to take part in the survey.

You will be doing a great service for your Community Foundation and our community so contact the Foundation office at 527-9038 or info@mhcf.ca

summer games awarded pro-active grant



The Board of Directors recently approved a pro-active grant of \$35,000 to the City of Medicine Hat and the 2008 Alberta Summer Games for the purpose of additional seating for the Family Leisure Centre.

A pro-active grant is one way in which the Board of Directors expresses their community leadership outside of the regular application process. In this case an opportunity to improve an important community facility was presented by the Medicine Hat 2008 Alberta Summer Games Society. The lack of spectator seating at the Family Leisure Centre has been a concern since it was built and this grant will leave a lasting legacy in the community as the seating will be a permanent fixture for continued use long after the Summer Games are over.

Community Foundation Vice-Chair, Shan Sneddon presents the pro-active grant cheque to Dr. Ken Sauer from the Medicine Hat 2008 Alberta Summer Games Society (middle) and Ron Webb representing the City of Medicine Hat.



The 2008 Alberta Summer Games run August 7th – August 10th
2008 Alberta Summer Games – Quick Facts

- Over 3,200 Athletes, Coaches & Officials
- Athletes Age Range: 11 – 17 Years Old
- Over 30 Venues & 3,000 Volunteers
- 15 Sports involved in the Games

For more on the Summer Games go to
www.2008albertasummertimegames.com

Community Foundation Upcoming Events...

- Legacy Club/Heritage Membership Launch
May 29, 2008
- Founders Day Picnic
June 19, 2008

part two

"Do I need a will?"

What everyone should know about planned giving

by David Carter

The following is the second in a series of four articles by David J. Carter, BA, MA, LLB, RFM. David is a partner at Sihvon Carter Fisher & Berger, Barristers & Solicitors and a past chair of the Community Foundation.

When should my beneficiaries receive their share of my estate?

If you have children and they are receiving an inheritance, do you want the distribution to be staggered over a number of years or paid out immediately? The answer to this will obviously depend upon the maturity of the child involved, the amount of money, their experience with handling money and your view of these things.

Testamentary trusts which give your Personal Representative the ability to distribute some money during the time the property is held in trust, provide some flexibility to your estate plan.

When should my beneficiaries receive their share of my estate?

If you are supporting family members other than your immediate family or want to leave a sum to other family members or friends, you should decide what the extent of the gift is that you want to make. The size of your estate at the time of your death may be quite different from the time that you are making your will; consider making your gift the lesser of a percentage of your estate and/or a dollar amount.

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Last Will — ((and)) — Testament

Creating a will: What everyone should know about planned giving

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What do I actually own?

Only property owned personally by the deceased can be disposed of by a will. It is important to distinguish between personal property and property owned by a family corporation but used by an individual, because only the shares owned by the deceased will actually transfer; the assets of the corporation remain the property of the corporation. Property that is owned with another as a joint tenant, such as real estate, investments or bank accounts with right of survivorship, pass outside of the will and by operation of law to the surviving joint owner.

If you calculate a proposed distribution under a will including property that actually passes outside of the will or is not actually owned by the deceased, the calculations are clearly skewed and your real wishes will not be realized.

Other assets including Registered Retirement Savings Plans, Retirement Income Funds, pension plans and life insurance, normally have designated beneficiaries. Although that designation can be changed in your will by a very specific provision, generally the beneficiary designation that you filed outside of your will will determine where those assets go. In thinking about a will, it is important to double check that these assets do have the beneficiary designation that you think they do. It is not uncommon for someone to think they are very sure about how they have designated a beneficiary of one of these investments only to discover that they are wrong; unfortunately, sometimes that discovery does not occur until after their death.

Family Assets

Often we have a family asset such as a cottage, a farm or a business that we want to keep in the family. But, are these assets also important to our family? Is leaving the cottage to several of our children a recipe for serious family disharmony after our death? If we leave it to one child, do we create resentment of that child by his siblings? We need to be sure that what we want for our children is something that they want as well. If we leave the farm to one of the children, does that family member have the skills necessary to manage the asset and the interest in managing that asset, or would it be better to liquidate that asset?

Often there are some special family heirlooms. With limited monetary value but significant emotional value; these include everything from great grandma's wedding silver to a painting or a special piece of furniture. These are often dealt with outside of the will. Discussions among the potential beneficiaries and a clear indication of your desires in this regard, will normally be respected. You can provide in your will for the distribution of personal items in a handwritten list that is left with your papers, though that list is not legally binding on your estate. But it is not economically effective to have a long detailed list of minor items listed in your estate, particularly if you feel the need to amend that list from time to time or as the items are destroyed or distributed.

You may get some emotional enjoyment out of gifting these items to your children as they get older or as you downsize.



Our Vision...
**"Creating a better community,
today, tomorrow, Forever."**

Who are we...

The Community Foundation is a non-political, non-governmental registered public charity established in 1992 through an act of the Provincial Legislation by a group of dedicated community-minded citizens. The Foundation supports a wide variety of health, educational, social, cultural and community charitable needs in Medicine Hat and South Eastern Alberta.

The Community Foundation is truly achieving it's mission of improving the quality of life for the people of South Eastern Alberta through developing permanent endowments, making responsible grants, and inspiring community leadership.

Our Current Board of Directors 2007/2008 are:

Ms. Kathy Mandeville, Chair
Dr. Shann Snedden, Vice Chair
Mr. Kelly Byers, Treasurer
Mrs. Linda Lehr, Secretary

Mrs. Cory Baksa
Mrs. Stephanie Cleary
Dr. Al Garden

Mr. Ryan Jackson
Ms. Carolyn Kawan
Mrs. Sharran Kungel

Mr. Ted Rodych
Mr. Clint Stromsmoe
Mr. Kent Walker

Mr. Rod Wutch, Past Chair
Mr. Bill Bauman, Honorary Director
Mr. Garth Vallely, Honorary Director

Mrs. Maureen Roberts, Recording Secretary