

# OSNS LEGACY FOUNDATION ANNUAL REPORT 2023



osns  
Legacy Foundation

*in support  
of*

osns   
Child & Youth Development Centre





# TERRITORIAL LAND ACKNOWLEDGEMENT

The OSNS Legacy Foundation respects that the land on which we live and connect with our families, donors and supporters is the traditional territory of the Syilx Okanagan People.

We are grateful to live, work, and play on these lands.

# A WORD FROM THE CHAIR



On behalf of the OSNS Legacy Foundation Board of Directors, I would like to express my sincere appreciation to our supporters. I would also like to thank the individuals and businesses who took the time to tour OSNS, learning about the invaluable work that takes place here, and to better understand what the Foundation is doing to ensure the financial security of the Centre.

I'd like to give a special welcome to Heather Miller, who in March of 2023 joined the OSNS Child & Youth Development Centre as the Executive Director. Thank you for your leadership of OSNS and the effort you've put in to get up to speed as quickly as you did!

As the chair of the OSNS Legacy Foundation, it is my pleasure to share a snapshot of what the Legacy Foundation accomplished in 2023. In 2023, we focused on continual outreach to our community with the goal of sharing the financial needs of the Centre. We built on the success of the Tim Hortons Smile Cookie campaign and held a successful Cars for a Cause event in partnership with Area 27. Here are some of our accomplishments:

- Supported a successful Tim Hortons Smile Cookie week, raising over \$58k (another record-breaking year) for the Legacy Foundation. All funds raised through the annual Tim Hortons Smile Cookie campaign go towards the Stawarz family's \$250,000 pledge to the Foundation.
- In collaboration with Area 27 Motorsports Club, we held a successful Cars for a Cause event where 100% of the proceeds supported the OSNS Legacy Foundation.
- Continued discussions with potential Legacy Foundation donors and received our first gifts of securities.
- Promoted the story of OSNS Client Hudson Suh through the March match fundraising campaign, where over \$19,000 was raised for OSNS.
- Invited representatives from the Community Foundation (CFSOS) to present at a Foundation board meeting regarding the long-term sustainability strategy options available at the CFSOS for the Legacy Foundation including grants, endowments, and legacy gifts.

Thank you to the entire Legacy Foundation Board and the OSNS leadership team for your commitment and dedication this past year. Lastly, thank you to the OSNS Board of Directors for your leadership in guiding this great organization. It inspires us and will continue to push us forward.

**MARK MELISSEN**

BOARD CHAIR

PRESIDENT, WILDSTONE CONSTRUCTION

# A WORD FROM OUR LEADERSHIP TEAM

As we reflect on 2023, we are thankful another year marked by increased engagement and support for the OSNS Legacy Foundation. Thank you to the businesses and individuals who chose to support the Legacy Foundation in 2023 – you are making a difference to the stability of pediatric rehabilitation support services in the South Okanagan Similkameen.

We are particularly thankful for the kindness and dedication demonstrated by the Area 27 Motorsports Club for hosting the Cars for a Cause event in July of 2023. This event not only brought excitement and joy to participants, attendees and OSNS families but also significantly contributed to our Foundation's endowment fund.

In addition, we were thrilled with the engagement of another successful Tim Hortons Smile Cookie week. Thanks to our community and the Tim Hortons team, we reached another record-breaking fundraising total that has contributed to the Stawarz Family \$250k pledge made to the Foundation. This achievement underscores the power of community collaboration and the difference we can make when we come together for a common cause.

Events like Cars for a Cause and Smile Cookie Week highlight the incredible impact that community-driven initiatives can have, and we are appreciative of everyone who played a part in these important events.

Thank you to each and every one of you for your generosity, dedication, and belief in this work and to the OSNS Legacy Foundation Board of Directors for your leadership. We look forward to making even greater strides in the coming year.

Warm regards,



**MEGAN WINDELER**  
PHILANTHROPY ASSOCIATE  
OSNS LEGACY FOUNDATION



**HEATHER MILLER**  
EXECUTIVE DIRECTOR  
OSNS CHILD & YOUTH DEVELOPMENT CENTRE



## OUR MISSION

Our mission is to secure the delivery of pediatric rehabilitation in the South Okanagan Similkameen by ensuring the financial stability of the OSNS Child & Youth Development Centre.

## OUR VALUES

- Generosity
- Stewardship
- stability
- Security

## OUR COMMITMENT

- We will seek out support.
- We will encourage generosity.
- We will invest wisely.



## SIMPLY STATED

*The goal of the Foundation is to grow sufficient funds to provide an annual interest income that covers the operating costs of the OSNS.*



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# MEET OUR BOARD OF DIRECTORS



**Mark Melissen**  
Chair

Mark is one of the founding board members on the OSNS Foundation board and has been involved with numerous initiatives helping support OSNS, including the Wildstone Colours 4 Kids Run and the Keith Relief Playcourt projects.

His board experience includes roles with the Yukon Chamber of Commerce, the Penticton Chamber of Commerce, the Southern Interior Construction Association (SICA), The Mining Suppliers Association of BC (MSABC) and the BC Chapter of the Young President's Organization (YPO).

As President of Wildstone Construction Group, Mark oversees construction operations/services in western and northern Canada for Wildstone. Wildstone is a diversified organization with holdings in construction, real estate, concrete, civil and environmental.

**Bernice Greig**  
Vice Chair

Bernice is a graduate of Penticton Secondary School. She obtained a BA (History) and Diploma in Art History from UBC, then an LLB from UVIC. After practicing in Vancouver with a large firm, she returned to her home-town of Penticton, where for the last twenty years she has had a solo general solicitor's practice, focusing on corporate, commercial and estate planning and administration matters, from which she retired recently.

Bernice was a director of the OSNS many years ago and is delighted to return to the fold to assist with the establishment of the OSNS Legacy Foundation. She has been a director and the president of the Penticton Secondary Schools Bursary and Scholarship Foundation for twenty years. She has also been a director of Penticton and Area Cooperative Enterprise (PACE) for several years. PACE is a social enterprise that seeks to empower individuals with mental health barriers through employment.



**Peter MacIntosh**  
Treasurer

Peter is a partner with Grant Thornton LLP (Canada), which is an international accounting firm. He holds the Chartered Professional Accountant (CA legacy) designation as well as the Family Enterprise Advisor (FEA) designation. He specializes in assisting privately owned business with the numerous business and tax issues they face, both externally and internally.

Peter and his family moved to the Okanagan from Ontario in 1996. They have come to enjoy the many outdoor activities that the Okanagan Valley has to offer, which include cycling, mountain biking and all kinds of skiing. He and his wife still marvel at the beauty of Penticton and the surrounding area.



**Dr. Kathy Gross**  
Director

Kathy joined the OSNS Foundation Board in March 2020. Kathy practiced as a Consultant Paediatrician and Paediatric Rheumatologist at Penticton Regional Hospital from 1990 until retirement in 2019. Kathy provided consultation services to OSNS throughout her career and valued the habilitation services that were available for her patients. Her daughters attended the Kinderplace preschool program learning compassion for children with developmental disabilities.

Administrative experience includes being Department Head of Paediatrics and serving on the Medical Advisory Committee at Penticton Regional Hospital. Kathy served on the OSNS Board of Directors from 2014 to 2019. She was a Director on the BC Pediatric Society Board from 2014 to 2019. Volunteer experience includes two Rotary trips overseas in Ethiopia helping patients undergoing plastic surgery for cleft palate disorders and burn scarring.





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# MEET OUR BOARD OF DIRECTORS



**Patt Dyck**  
Director

Patt has lived in the Okanagan Valley since 1980. She and her husband Ron moved to Naramata to escape the crazy pace of life in the Lower Mainland. Together, Patt and Ron operated the Country Squire Restaurant in Naramata for 23 years. They welcomed tourists and locals to a fine dining experience in a heritage house, mere steps from Okanagan Lake. In 2000, they founded Cannery Brewing and began a new journey focused on craft beer well before the term craft beer became a thing.

Patt is committed to building relationships throughout the community: with customers, suppliers, charitable organizations, partners in the Arts and the growing Cannery Brewing team and their families. She is a long-time board member of the Naramata Community Fund Society. Outside of her day-to-day passion for running Cannery Brewing, Patt enjoys singing with the Naramata Community Choir, hiking the Kettle Valley Rail Trail, and spending time with her family.

**Dr. Gurpal Buttar**  
Director

Gurpal grew up in Penticton. His post-secondary education includes time at UBC, the University of Manitoba and McGill University. While abroad, he always knew he would return to the Okanagan and has been practicing as a board-certified Periodontist in Penticton for almost 10 years. He has a special interest in child development and is involved with coaching junior tennis and hockey.

Gurpal's wife, Caroline, is a Pediatric dentist and specializes in the treatment of children with behaviour and developmental challenges. They have two lovely children, Zoe and William, and look forward to raising them in this beautiful community.



**Scott Austin**  
Director

Scott was born in Summerland and lives in the community with his wife Susy. They have two children and two grandchildren. Scott obtained a Bachelor of Arts (Geography) from UBC but found his calling in horticulture, starting in 1984. He was nursery manager at Art Knapp's and then GardenWorks in Penticton for 35 years. During that time he hosted a weekly call-in radio show, Garden Talk, and wrote a gardening column for the Penticton Herald for 25 years. In 2013 he published his book 'Sun, Sage and Sagebrush-Lessons from an Okanagan Garden.'

Scott has a long association with the OSNS Child and Youth Development Centre, dating back 30 years when his son was born at 29 weeks at BC Children's Hospital. He was followed up for a year by the team at OSNS. His granddaughter Sophie is now a regular visitor to the Centre, receiving occupational and speech therapy. Scott has worked with the children in the vegetable garden beds at the Centre for many years and is a passionate supporter of the people and programs of OSNS.

Scott retired from the garden centre business in 2023 but continues his involvement in horticulture in a volunteer role. He also enjoys cycling, cheering for the Canucks and Vees, exploring the world of wine and teaching gardening skills to his grandchildren.

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# MEET OUR LEADERSHIP TEAM



***Megan Windeler***

Philanthropy Associate, OSNS Legacy Foundation  
& OSNS Child & Youth Development Centre

Originally from Penticton, Megan spent several years studying and living in Toronto, as well as some time working abroad. She is happy to be back home in the Okanagan Valley.

After obtaining a Bachelor of Fine Arts from York University, she completed the Fundraising Management post-graduate program at Humber College in Toronto in 2015 and has since been working in the non-profit sector. She has held roles with the Mental Health Foundation in London, England, Age Concern New Zealand, and before relocating to Penticton, she worked with BC Children's Hospital Foundation in Vancouver. With her knowledge and experience in fundraising and relationship management, Megan hopes to make a meaningful impact on the OSNS Legacy Foundation and to the financial security of the OSNS Child & Youth Development Centre.

In her spare time, Megan loves spending time with her dog Luna and enjoying the beautiful surroundings the Okanagan has to offer.

***Heather Miller***

Executive Director, OSNS Child & Youth Development Centre

As the Executive Director for the OSNS Child and Youth Development Centre since March of 2023, Heather is grateful for the significant contributions of the Legacy Foundation Board in sustaining long-term stability for the organization's services to the South Okanagan Similkameen communities. Working with this deeply caring board has enhanced Heather's experience in public healthcare and childcare services.

Heather moved to Penticton from Saskatchewan in July of 2022 after 30 years of experience in child, youth and family service delivery. Heather has a Post Graduate Diploma in Business Administration, a Social Work Degree and a Sociology Degree.

Heather appreciates the everyday learning and connections she experiences with the extended OSNS family and community.





# COMMUNITY ENGAGEMENT



In 2021, the Stawarz Family, owner operators of the South Okanagan Tim Hortons, committed to a generous **\$250,000 pledge** towards the OSNS Legacy Foundation through the Smile Cookie Week campaign. With this pledge, they have shown us and the community their dedication to supporting the future of pediatric rehabilitation in our region. We thank them for this commitment.

In 2023, a very successful Smile Cookie week was held, raising **\$58,643** for the OSNS Legacy Foundation, another record-breaking fundraising total.

## 2023 Smile Cookie Week Highlights:

- Smile Cookie business challenge lead by Wildstone Construction that continued throughout the week, engaging many local South Okanagan businesses
- Featured articles in the Penticton Herald and Castanet news
- OSNS Family Spotlight on the Austin family - Scott, Susy, their son Sam and granddaughter Sophie
- Enthusiasm and engagement from Tim Hortons team



**Every smile cookie™ makes a difference.**

**100% OF THE PROCEEDS SUPPORTS PEDIATRIC REHABILITATION PROGRAMS IN THE SOUTH OKANAGAN**





**Tim's** NOW MAY 1-7

**MEET SAM AND SOPHIE**

Tim Hortons. Smile Cookie Spotlight Family

1/5

**A connection spanning over 30 years,**

OSNS continues to make an impact on Scott and Susy Austin and their family. Their son Sam was born in 1993 at 29 weeks at BC Children's Hospital. He weighed 2 pounds 12 ounces. Sam had a brain bleed, and they were told he might have cerebral palsy. He had no heartbeat, so they didn't know how oxygen deprived he was. Scott and Susy spent 8 weeks at Children's Hospital and during that time they were prepared by the doctors for every eventuality. When Sam was stable and they finally were able to go home, they were referred to OSNS. A therapist began seeing Sam every month to work on Sam's developmental progress. Scott and Susy still remember Sam on the floor with the therapist working on different skills.






# COMMUNITY ENGAGEMENT

**Area 27 Cars for a Cause** took place in July 2023 with proceeds supporting the OSNS Legacy Foundation. The event included paid ride along's, a 'Show and Shine' as well as a unique opportunity for OSNS families to meet Area 27 members and view the sports cars.

## *Event Highlights*

- 55 Co-pilot Rides
- 30 Show and Shine entries
- 40 General Admission
- 19 OSNS Families

**\$24,827** was raised in total through the Cars for a Cause event. These funds came from donations provided on the day and through the paid ride along's. Personalized thank you cards were organized for each driver and Area 27 team member who participated.

**Area 27**  
Cars for a  
Cause





# COMMUNITY ENGAGEMENT

## Corporate and Community Support

**Wildstone Construction Group** held the Wildstone's Colours4Kids Run in June of 2023 for the first time since 2019. This event is a fun-filled, family centred event that supports the OSNS Legacy Foundation and the OSNS Child & Youth Development Centre. **For the first time ever, Wildstone made the run by donation and matched donations up to \$20,000. \$40,000 was raised through this event and was provided directly to OSNS.**



The **Grant Thornton Foundation** provided a generous donation of \$5,500 to the OSNS Legacy Foundation in January of 2023. This is the second donation of the size to be contributed to the OSNS Legacy Foundation from the Grant Thornton team.



The **Penticton Art Gallery**, in partnership with **Ignite the Arts Festival** and **Cannery Brewing**, hosted a variety of fundraisers throughout March 2023 to participate in the March match fundraising campaign where donations to OSNS were being matched by Wildstone Construction up to \$3,000. Through the various fundraisers, \$1,000 was donated to the OSNS Legacy Foundation.

## Individual Support

### Individual Donor Highlights:

- The Foundation received it's first gift of securities through our partnership with the Community Foundation
- Monthly donations continue to be made by an individual donor who has been donating regularly to the Legacy Foundation since it's inception
- A gift of \$2,000 was made by a donor who contributes annually to the Foundation

# STRATEGIC PRIORITIES

OUR STRATEGIC PRIORITIES ARE FOCUSED ON INCREASED ENGAGEMENT WITH BUSINESSES AND MEMBERS OF THE COMMUNITY. WE SEEK TO ENGAGE OUR NETWORK IN THE WORK DONE AT OSNS, THE IMPACT THE CENTRE HAS ON FAMILIES IN THIS REGION, AND THE IMPORTANCE OF SECURING THESE PEDIATRIC TREATMENT SERVICES INTO THE FUTURE.

## PRIORITY #1: ENGAGEMENT OF BUSINESSES AND INDIVIDUALS

We will continue to have meaningful conversations and hold tours of OSNS with businesses and individuals - both of which will allow us to share the increased need for support of OSNS. We will work closely with those who are interested in supporting the Foundation by finding a giving strategy that aligns with their goals.



## PRIORITY #2: PROFESSIONAL ADVISOR ENGAGEMENT

We will connect with Professional Advisors in our community, individually and through professional advisor events, to share the mission of the OSNS Legacy Foundation and educate them on charitable giving tax strategies for their client base.

## PRIORITY #3: COMMUNITY FUNDRAISING

Community fundraising initiatives will be developed to engage members of our community at the grass roots level in the work of the Legacy Foundation.

We will provide support to the annual Tim Hortons Smile Cookie campaign, of which fundraising dollars go towards the Stawarz Family's \$250k pledge to the Foundation.



# STRATEGIC PRIORITIES

## PRIORITY #4: LEGACY FOUNDATION EVENT

A public fundraising event will be held to raise funds for the OSNS Legacy Foundation. Currently, the Area 27 team will hold Cars for a Cause every two years in support of the Foundation.

## PRIORITY #5: PARTNERSHIP WITH THE COMMUNITY FOUNDATION OF THE SOUTH OKANAGAN SIMILKAMEEN

We will continue to leverage our relationship with the Community Foundation of the South Okanagan Similkameen in order to receive assistance in processing the more complicated gift types such as gifts of life insurance, RRSP and bequests.



## PRIORITY #6: STORY TELLING AND BRANDING

We will work closely with the OSNS team on how we can best tell the OSNS story. Collaborating on branding and marketing, we will continue to work on the joint messaging of OSNS and the Legacy Foundation to ensure our community understands the need for this resource in our community.

## PRIORITY #7: OSNS & FOUNDATION PARTNERSHIP

We will work closely with the OSNS Executive Director and Finance team to understand the financial needs of the Centre, ensuring the Legacy Foundation can provide financial support when needed.

# ABOUT OSNS

The OSNS Child & Youth Development Centre was established out of an understanding that children in need of support should have a local and welcoming space to “be”. That was over 45 years ago. The current facility of OSNS, built in 1996 for the children of the South Okanagan-Similkameen, has grown to become that welcoming space, providing treatment for children with development differences, their families and for innovative programming. With thousands of program hours annually, the OSNS is recognized for their work in the field of pediatric health care, early-learning, autism/behaviour intervention and family support delivered with a social lens.

The staff and leadership at OSNS are highly experienced in the field of child development with both governance and operational policies to guide their work. OSNS is committed to quality improvement through accessibility, responsiveness and appropriateness of care. They believe in a best-practice, health-equity, a community-based service delivery model, continuously working toward building trusting connections, culturally safe, non-discriminatory, trauma informed services

***The mission of OSNS is to optimize the health and wellbeing of every child, youth and family they serve.***



## AREAS SERVICED BY OSNS



|            |          |           |
|------------|----------|-----------|
| Penticton  | OK Falls | Osoyoos   |
| Summerland | Naramata | Princeton |
| Cawston    | Kaleden  | Hedley    |
| Oliver     | Keremeos | Coalmont  |



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# TREATMENT PROGRAMS AT OSNS

INTERVENTION AT OSNS IS EVIDENCED-BASED, DATA-DRIVEN AND SHARPLY FOCUSED ON QUALITY CARE. THE TEAM STRIVES TO TALK ABOUT WHAT MATTERS TO FAMILIES AND TO BE ACCOUNTABLE FOR CONSISTENT PROGRESS. AS A MULTIDISCIPLINARY ORGANIZATION, OSNS PROVIDES INTEGRATED PEDIATRIC AND EARLY EDUCATIONAL PROGRAMMING.

## EARLY INTERVENTION PROGRAM

Speech-Language Pathology, Physiotherapy and Occupational Therapy for children ages birth until school entry. Treatment sessions can be Centre based, home/community based, group or individual.

## EARLY CHILDHOOD EDUCATION

Inclusive Kinderplace Preschool & Daycare programs. The specialized ECE staff team teach pro-social skills and kindness through strengths-based programming and collaborative, family-centred care.

## FAMILY SUPPORT

Available to all families referred to OSNS. This includes intake meetings and navigation of the Centre and community resources, as well as ongoing support with the process of understanding services, diagnoses and advocacy.

## AUTISM INTERVENTION

A skill-building program for children aged 2-12 with a diagnosis of Autism Spectrum Disorder. The autism program addresses social skills and communication, play, fine and gross motor skills, self-help skills and emotional regulation.

## ASSESSMENT SERVICES

Early years multidisciplinary assessments monitor for at-risk markers and coordination of autism assessments for children under 6.



*"Our son has received Occupational and Physiotherapy at OSNS. He sees his clinician in regular blocks. Since starting at OSNS he is now able to pick up a pen/felt/crayon and can colour a picture, although sometimes on the wall, but before he would avoid it at all costs. His speech has blossomed as has his personality. We are so indebted to OSNS and all the wonderful people that work with him."*

*-Kristie*

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# HOW DO YOU WANT TO BE REMEMBERED?

BY INCLUDING THE OSNS LEGACY FOUNDATION IN YOUR ESTATE PLANS, YOU CAN ENSURE THAT YOUR VALUES AND COMMITMENT TO CHILDREN WITH DEVELOPMENTAL CHALLENGES AND THEIR FAMILIES CONTINUE TO MAKE A DIFFERENCE FOR GENERATIONS TO COME.

Having the OSNS Legacy Foundation in place since 2021 has made it possible to accept a number of different gift types, broadening giving opportunities for our community. The Foundation's mandate is to provide financial stability to the OSNS Child & Youth Development Centre, and with the consideration of a planned gift, you will be contributing to this mandate, helping to ensure the sustainability of the OSNS mission beyond your lifetime.

## Some planned giving options to consider:

1. **Bequests:** Designate the OSNS Child & Youth Development Centre as a beneficiary in your will, which allows you to allocate a specific amount or percentage of your estate to support our mission.
2. **Life Insurance Policies:** Name OSNS as a beneficiary of your life insurance policy, turning a modest investment into a significant gift.
3. **RRSP, RRIF & TFSA:** Name the OSNS as a beneficiary of your RRSP, RRIF or TFSA.
4. **Gift of securities:** donate shares, bonds or mutual funds

We understand that estate planning is a personal decision, and we want to assure you that any commitment you make will be handled with care and respect. We would be happy to work with you to explore the various planned giving options available and tailor a solution that aligns with your philanthropic goals.

We recommend discussing your planned giving options with your financial or legal advisor to determine which approach best suits your unique situation



GET IN TOUCH WITH  
US TO LEARN MORE.

"I included the OSNS Legacy Foundation in my will because I want to make sure **this excellent organization continues no matter what**. I feel strongly that if children with developmental challenges build skills and have successes, they will build their confidence as young individuals, who will then turn into amazing adults with leadership skills who will in turn give back to our community. **These children are our future and we, as a community, need to make sure OSNS always has the funds to do what they do so well.**"

-Sharon Romank, OSNS Legacy Foundation bequest donor



# OUR SINCERE THANKS

THANK YOU FOR YOUR SUPPORT OF THE OSNS LEGACY FOUNDATION.  
TOGETHER, WE CAN MAKE A MEANINGFUL DIFFERENCE TO THE OSNS  
CHILD AND YOUTH DEVELOPMENT CENTRE.



**OSNS Legacy Foundation**

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In support of

