# Fostering Sustainable Futures for Rural Community and Regions through Philanthropy

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## **Executive Summary**

Rural communities across Canada are changing. This change is being driven from a number of drivers; both from within the community and external to the community. This research initiative examined how rural community foundations can influence and participate in regional development to support the revitalization and sustainability of their communities.

Across Canada there are many definitions and perceptions of 'rural'. Using the Rural and Small Town Canada definition of Statistics Canada, this research defines rural community foundations by three characteristics: (i) registered as a charitable organization with the Canada Revenue Agency, (ii) registered as a member of the Community Foundations of Canada, and (iii) the head office of the community foundation is located in a community with a population of less than 10,000.

The goal of this project was to examine how community foundations can influence and participate in regional development in rural areas to support revitalization and sustainability. The narratives from the Sussex Area Community Foundation and the Virden Area Foundation clearly indicate they are both active in supporting, facilitating, and financing their communities. Each community foundation supports a wide variety of local initiatives, ranging from scholarships, to health services, to recreation facilities, to historical preservation. In just 2012, these two community foundations provided over \$79,000 in grants to qualified donees in their communities. The nature of community foundations, whereby endowments are typically not spent, means these communities will

continue to receive similar annual investments. Growth of their endowments would enable the community foundations to increase their investments into their respective communities.

Three principal methods were used to examine the intersection of philanthropy and regional development: Canada Revenue Agency charity data, community-based literature, and key informant interviews. Canada Revenue Agency's Charities Directorate provided access to the financial records of community foundations and their endowments. Each community foundation's annual reports describes the granting process on how they are contributing to their community's sustainability. The interviews with community foundation board members, and grant recipients provided a direct perspective as to how each foundation is unique and how they operate within their communities.

This report enhances the understanding of how rural community foundations participate in the revitalization and sustainability of their communities. The discussions with two rural community foundations focused on the impacts of the foundation on their community, connections to other local stakeholders, opportunities and challenges encountered, and future desired achievements. Based on these discussions the findings focus on: the substantial financial capital held by community foundations in rural Canada; the creation and influence of local-based funders; the re-balancing of the relationships with government; and the disconnect between philanthropy and other local actors with similar local priorities.

The research findings enhance our current understanding of philanthropy and its potential roles in regional development. And the potential is there: 43% of all community foundations in Canada are located in rural communities (83 of 191); substantially higher proportion than percent of people living in rural communities in Canada (20%). Given the significant shift towards rural community foundations in the past decades, it is important to determine how each individual foundation participates in strengthening their regions.

Although both community foundations were active in their community, neither immediately saw themselves as contributors to their community's revitalization or

sustainability. The work undertaken and the benefits accrued by the community foundation clearly align with the terms revitalization and sustainability. Upon discussion board members and staff all concurred they were engaged in these types of activities but often used different terms to describe the same phenomenon. Community foundation board members often referred to their activities in language of community development and social development. This report outlines the various methods community foundations are participating in the intersection of philanthropy and rural development: supporting initiatives that support community sustainability and revitalization, building connections to other community-based organizations, planning for future endowment growth to maintain their financial contributions to the community's priorities, and taking a leadership role in the future of their communities.

The narratives from both the Sussex Area Community Foundation and the Virden Area Foundation demonstrated their commitment to their communities and identify the current roles they are playing in sustaining and revitalizing their communities. Their perspectives also shed light on a series of recommendations for enhancing the intersection of community foundation and rural development. Some of these recommendations include: exploring the expansion of the community foundation movement to rural communities and regions not currently served by a community foundation, communicating with each other foundations to serve as an interest group to provincial and federal governments to influence policy and programs that can assist to the sustainability of their regions, and capitalizing on the intergenerational transfer of wealth within their communities for future generations.

This research initiative would not have been possible without the contributions from staff and board members of the Sussex Area Community Foundation and the Virden Area Foundation. Financial support was received from the Institute of Nonprofit Studies at Mount Royal University and the Leslie Harris Centre for Regional Policy and Development at Memorial University.

#### Introduction

Rural communities are at a critical turning point in Canada. Rural communities and regions have witnessed decades of dramatic changes: the dismantling of rural institutions, the out-migration of young people and skilled labour, economic restructuring, and the continued investment on infrastructure to bring resources out of rural areas. The future of rural communities is largely viewed as dependent on external actors and external funds. Philanthropy, through the platform of community foundations, provides a surprisingly useful mechanism for rural communities and regions to use existing local resources to facilitate sustainability and revitalization. Community foundations, as one type of registered charity, can therefore play a substantial role in rural development.

The recent economic recession, and the accompanying period of austerity measures, cast shadows on the ability of governments to sustain and revitalize rural communities. Local development actors, processes, and agencies have been shifted, or are still shifting. Recent policy announcements by both the federal and the provincial governments have re-iterated the dependence of local development initiatives on government funding. When funding is available there is no problem; however, in times of austerity and during changing political priorities the dependency becomes a liability. These shifts, or transitions, have created the need to reflect on the new reality of local development.

Philanthropy through community foundations is explored as a mechanism to facilitate and sustain rural development. This project examined how community foundations, as one agent of philanthropy, influenced and engaged in rural development to support revitalization and sustainability. Two rural community foundations were profiled to enhance the investigation: the Sussex Area Community Foundation in New Brunswick and the Virden Area Foundation in Manitoba. Through this examination potential roles, actions, and activities to enhance the intersection of philanthropy and regional development were discovered. Throughout this initiative regional development was conceived in a holistic manner encompassing social, cultural, humanitarian, community development, and capacity building.

To understand how community foundations can be utilized to facilitate and sustain rural development this report first addresses two foundational questions. First, the report examines what is meant by the term 'rural' as there are multiple definitions and perceptions of what is 'rural'. Second, the report identifies three pivotal trends that are influencing rural communities across Canada. Rural communities and their residents have witnessed dramatic shifts in the past three decades, each influencing their sustainability. With this knowledge the concept of rural is applied to the community foundation movement in Canada. Key characteristics of the 83 rural community foundations are investigated, such as value of financial assets and date of creation.

Two rural community foundations, the Sussex Area Community Foundation and the Virden Area Foundation, participated in a series of discussions to enhance the understanding of the intersection of philanthropy and rural development. Board members, staff, and grant recipients provided perspectives on how their respective foundations are influencing rural development – both from the perspectives of maintaining and advancing their region's sustainability. These perspectives identify a number of key challenges for advancing the ability of community foundations to sustain their communities and regions.

#### Rural Canada in Transition

All communities are changing; rural communities are no exception. These changes are driven from a number of influences, coming from forces both within and external to the community. Many rural communities are embracing these changes to stimulate and sustain their well-being. On the other hand, many rural communities struggle to adapt to the changing conditions. The influence of these forces, whether as a stimulus or a drain, is creating a transition among rural communities and regions across the country.

Before highlighting key influences serving as a catalyst for transitions, this section defines what is meant by rural through the adoption of Statistics Canada's Rural and Small Town Canada definition in this research. The forces influencing the transition in rural Canada are then explored, which demonstrate the opportunity for philanthropy.

#### Who is Rural?

What is meant by rural in Canada? For many people, rural Canada conjures images that were eloquently written by the likes of W.O. Mitchell, Stephen Leacock, and Alice Munro. Images of the expansive prairies, the coastal outport communities, and agricultural landscapes often come top of mind. These literary descriptors were accurate of the time and have remained for many people. The degree to which these literary

imageries remain accurate can be contested. Rural cannot be defined solely on visual and literary descriptions.

"Here was the least common denominator of nature, the skeletal requirements of simply land and sky" Mitchell (1947)

Rural represents more than these images portrayed in literature and the images portrayed in popular media. In defining rural Bollman and Reimer (2010) characterize rural as being influenced by two elements: distance and density. Rural communities are often defined based on their distance to larger urban centres, whether they are a Census Agglomerations (CA) or Census Metropolitan Areas (CMA). Further, rural communities are challenged by a lack of density, making economies of scale difficult or impossible.

There are numerous alternative definitions of rural in the Canadian context. This includes: census rural (Statistics Canada, 1999a), forward sortation areas (Statistics Canada, 1999b), predominantly rural regions (Organisation for Economic Cooperation and Development, 1994), and Rural and Small Town Canada. Throughout this research, rural is defined by Statistics Canada's Rural and Small Town Canada definition: areas outside CMAs and CAs (DuPlesis et al., 2002). CMAs are generally defined as communities with a population exceeding 100,000, while CAs are defined as having an urban core of 10,000 or more. By default, rural is defined as communities with a population of less than 10,000 residents.

As of the 2011 census, approximately 1 in 5 Canadians live in rural communities. Over the past four censuses the population of Canadian living in rural communities continues to grow, albeit at a rate of growth much smaller than that experienced in urban communities. This growth is not being witnessed in all rural communities. For every rural community

1 in 5 Canadians lives in a rural community

experiencing positive population growth rate, there is a rural community experiencing a

negative population growth rate. It is important to remember that each rural community is unique: they are unique in how they respond to the forces influencing their transition.

#### Influences of Rural Transition

In 2001, Reimer stated, "rural Canada is undergoing significant changes" (p. 845). The catalysts for Reimer's comments are many, encompassing economic, environmental, social, political, and cultural influences. This change, or transition, did not emerge in the early 2000s. This transition has been shaped by a number of factors over the past three decades, three of which are described below.

#### **Economic Restructuring**

Since the 1980s rural communities have witnessed a restructuring of their local and regional economic bases. The stimuli for economic restructuring are numerous, including the decline in natural resource industries (Halseth & Sullivan, 2004; Paquette & Domon, 2003), the out-migration of rural residents (Beshiri & Bollman, 2001), increase in urban employment opportunities (Bourne & Rose, 2001), and globalization (Fuller et al., 1993; Parkins & Reed, 2013). Rural communities have responded to this economic restructuring in a variety of manners. Some communities are prospering from the transition, while other rural communities struggle to respond. Distance and density, key characteristics of rural, hinder the ability of rural communities to actively participate in the new global economy. Infrastructural deficits, such as the lack of high speed Internet, obstruct rural communities from participating.

#### Mobility of Rural Residents

The migration patterns, both out-migration and in-migration, taking place have had a substantial influence on the current transition in rural Canada. The struggle with economic restructuring serves as a motivation for out-migration. In rural communities across the country the level of labour mobility has increased, particularly around young and skilled workers. Walsh (2012, 2013) illustrates the mobility of women in rural Newfoundland and Markey (2010) documents the fly-in/fly-out phenomenon-taking place in natural resource based industries in rural and northern communities. Out-migration and fly-in/fly-out phenomena have facilitated rural transitions, often by increasing the proportion of seniors within these communities. This has substantial implications on both the immediate (such as municipal taxation) and the long-term (intergenerational transfer of wealth).

Communities benefiting from economic restructuring have witnessed the opposite pattern: in-migration. New residents to these communities are coming from both other Canadian provinces/territories and internationally. Smart (1998) highlights the role of immigrant labour in Alberta industries; Gibson et al. (forthcoming), Kelly et al. (2013), and Silvius (2005) document the immigration phenomenon in Manitoba communities, and Billah et al. (2013) examine the trend in Newfoundland and Labrador. The mobility experienced in rural communities is both facilitating and hindering the ongoing transitions.

#### Dismantling of Rural Institutions

In the past ten years, Canada has witnessed the dismantling of a number of key rural institutions. In general, we have seen a movement from collectivism to individualism (Canadian Rural Revitalization Foundation, 2013). This movement is not unique to rural communities; however, the implications are being experienced harder in rural communities due, again, to distance and density. The

dismantling of rural institutions can be witnessed at various scales: federal, provincial, and local.

At the federal scale, the Canadian government has disbanded a number of key actors that supported rural communities. Since 2010, the Rural and Cooperatives Secretariat and the rural analysis unit of Statistics Canada have been discontinued (CRRF, 2013). At the provincial level, regional and community economic development actors struggle to continue their mandates in lieu of decreased or discontinued funding arrangements (Gibson, 2013; Hall, 2013). At the local level, many rural organizations struggle with aging volunteers and limited financial capacities. This has resulted in a number of organizations discontinuing or diminishing their services. The dismantling of rural institutions, at all scales, places even more pressure on rural communities during the period of transition.

These factors contribute to the transition-taking place in rural communities throughout the country. By no means are these the only factors influencing the transition. This transition, or reality for rural communities, fuels this investigation on how philanthropy can be utilized as a mechanism to support, sustain, and even revitalize rural communities and regions.

## Philanthropy in Rural Canada

The concept and application of philanthropy in rural Canada is not a new phenomenon. Philanthropy, in one form or another, has been taking place in communities for over a hundred years. The substantial contributions to rural communities by charitable organizations and voluntary organizations are well documented (cf. Barrett & Gibson, 2013; Bruce, Jordan & Halseth, 1999; Gordon & Hattie, 2008). Philanthropy represents a wide variety of organizations and activities. For this research, the focus is on community foundations.

Community foundations are registered charitable organizations with the Canada Revenue Agency. Community foundations are defined as "an organization established to manage a community endowment fund, the income from which is distributed to registered charities within a community" (CRA, 2013a). Community foundations are also registered members of the national network of community foundations<sup>1</sup>.

Canadians are quite charitable with their financial resources. In 2010, Canadians over the age of 15 contributed \$10.6 billion to charitable organizations (Turcotte, 2012). This averages to approximately \$450 per person. In that year the vast majority of Canadians, 84%, contributed to a charitable organization (Barrett & Gibson, 2013).

<sup>&</sup>lt;sup>1</sup> For more information on the national network of community foundations visit Community Foundations of Canada's website: www.cfc-fcc.ca.

Although community foundations are just one type of charitable organizations this national data illustrates the robustness of the philanthropic section in the country.

A 'rural community foundation' is defined by three components:

- registered as a charitable organization with the Canada Revenue Agency
- registered as a member of the Community Foundations of Canada, and
- the head office of the community foundation is located in a community with a population of less than 10,000

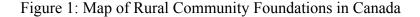
If a community foundation meets all three elements it is deemed to be a 'rural community foundation'. Labeling a community foundation as "rural" is complicated by the fact many foundations provide services to a number of communities or a region. In utilizing this definition it is recognized that community foundations based in large urban area that provide services and supports to a larger region including small communities are not captured. This is the situation for the Community Foundation of Newfoundland and Labrador (based in St John's), the Community Foundation of Prince Edward Island (based in Charlottetown), and the Community Foundation of Nova Scotia (based in Halifax).

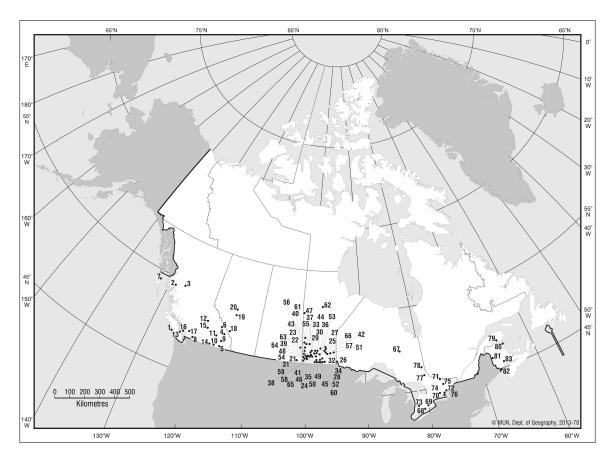
#### Rural Community Foundations

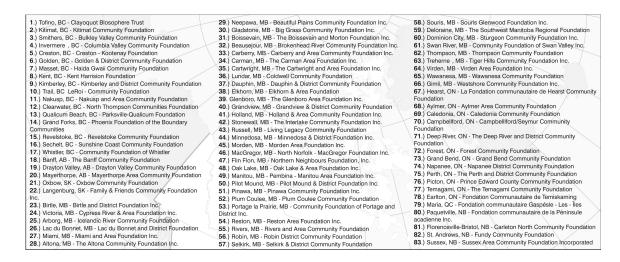
In Canada there are 191 community foundations, representing every province and the Northwest Territories (Community Foundations of Canada, 2013). Based on the definition of a rural community foundation 83 of the 191 community foundations are located in a rural community (see Figure 1). Roughly 43% of all community foundations are located

43% of all
Canadian
community
foundations
located in rural
communities

in a rural community. This proportion is substantially higher than the proportion of Canadians living in rural communities (20%). A complete list of rural community foundations can be found in Appendix A.







The distribution of rural community foundations across Canada is uneven, as seen in Table 1. A total of 44 rural community foundations are based in Manitoba, followed by 17 rural community foundations in British Columbia. A number of factors have influenced the unevenness of community foundations in rural Canada. In Manitoba the Thomas Sill Foundation<sup>2</sup> encouraged the proliferation of community foundations. As a private foundation, the board of the Thomas Sill Foundation provided matching grants to rural communities to encourage them to establish a local/regional community foundation in the 1980s and 1990s.

Table 1. Rural Community Foundations by Province

Province	No. Rural Community Foundations
Alberta	2
British Columbia	17
Manitoba	44
New Brunswick	4
Newfoundland and Labrador	0
Nova Scotia	1
Ontario	12
Prince Edward Island	0
Québec	1
Saskatchewan	2

Source: Community Foundations of Canada, 2013

The second contributing factor supporting the uneven distribution of rural community foundations is the presence of a larger community foundation. The largest community foundations in Manitoba and British Columbia, The Winnipeg Foundation

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<sup>&</sup>lt;sup>2</sup> For further information on the Thomas Sill Foundation visit http://thomassillfoundation.com.

and the Vancouver Foundation, have provided both formal and informal support and mentoring to rural community foundations.

In 1921 The Winnipeg Foundation was established, the first community foundation in Canada (Community Foundations of Canada, 2014). It was over fifty years before the first rural community foundation in Canada was established – The Minnedosa and District Foundation in 1974 (Town of Minnedosa, 2014). Since 1974, 82 additional rural community foundations have been established. The most recent to be established were in 2010: Birtle and District Foundation, Icelandic River Community Foundation, and Pinawa Community Foundation in Manitoba, as well as Oxbow Community Foundation in Saskatchewan. Most rural community foundations in Canada were established in the 1990s and 2000s, over 80 years after The Winnipeg Foundation was established (see Figure 2). The average year of establishment for rural community foundations is 1998.

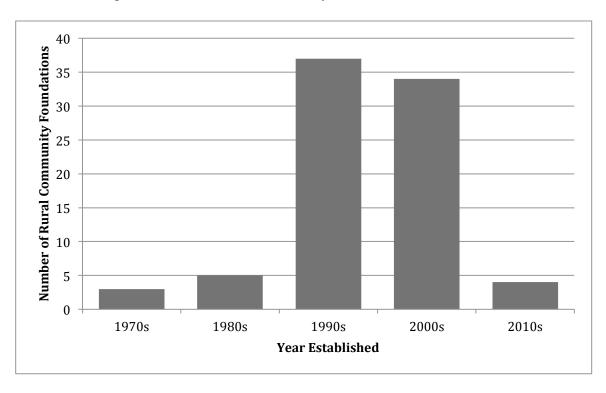


Figure 2. Date of Rural Community Foundations Establishment

Source: Canada Revenue Agency (2013b)

#### Assets of Rural Community Foundations

As a registered charity rural community foundations are required by federal law to annually submit a return to the Canada Revenue Agency. This return provides publically available information on the community foundation's board of directors, areas of programming, and financial assets. Financial data from rural community foundations was compiled from the Canada Revenue Agency's Charities Directorate (<a href="http://www.cra-arc.gc.ca/charitylists/">http://www.cra-arc.gc.ca/charitylists/</a>). The directorate provides information on each community foundation's financial assets and areas of programming. The directorate also provides background information on each community foundation, such as the year the foundation was established and local contact information. The Canada Revenue Agency data was used to compile statistics on the total financial assets of rural community foundations and the year of establishment.

Of the 83 rural community foundations 69 had submitted their 2012 Canada Revenue Agency annual return. The total value of financial assets held by rural community foundations is \$114,550,651 (Canada Revenue Agency, 2013). This represents the total value of the following assets: cash, bank accounts, short-term investments; amounts receivable

Rural community foundations have over \$114 million dollars invested

from non-arm's length parties; amounts receivable from all other; investments in non-arm's length parties; long-term investments; inventories; land and buildings in Canada, other capital assets in and outside Canada; and accumulated amortization of capital assets.

Financial assets by province hold a similar unevenness to that of the distribution of rural community foundations across the country (see Table 2). It is interesting to note that the rural community foundations in Manitoba have more than double the financial assets over British Columbia, the province that is ranked second in the table.

Table 2. Value of Financial Assets of Rural Community Foundations by Province

Province	Value of Financial Assets
Alberta	\$11,615,526
British Columbia	\$21,080,466
Manitoba	\$46,290,933
New Brunswick	\$9,110,724
Nova Scotia	\$408,482
Ontario	\$16,142,522
Quebec	\$8,716,510
Saskatchewan	\$1,185,488

Source: Canada Revenue Agency (2013b)

There is a substantial range of total assets by rural community foundations. The wealthiest rural community foundation by total assets is the Banff Community Foundation (Alberta | established in 2002) with \$9,252,098. At the opposite end of the spectrum is the Holland and Area Community Foundation (Manitoba | established in 2006) with total assets of \$46,918. The mean financial assets of the 69 rural community foundations that filed taxes in 2012 was \$1,594,506 (Canada Revenue Agency, 2013).

Each community foundation has different size of endowment, or total assets. The majority of rural communities hold total assets of less than \$3,000,000 (see Figure 3). Only nine community foundations hold endowments exceeding \$3,000,000. This pales in comparison to urban-based community foundation endowments: The Winnipeg Foundation (\$576,386,527 | established in 1921), Vancouver Foundation (\$814,959,358 | established in 1943), The Greater Saint John Community Foundation (\$8,593,710 | established in 1977), Thunder Bay Community Foundation (\$7,487,336 | established in 1971), and Saskatoon Community Foundation (\$29,877,586 | established in 1970).

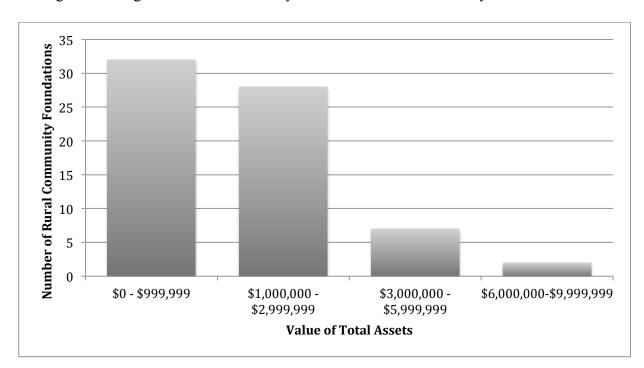


Figure 3. Categories of Total Assets by Number of Rural Community Foundations

Source: Canada Revenue Agency (2013b)

## Two Rural Community Foundations

To understand if and how rural community foundations are interacting with their communities two community foundations were investigated (see Figure 4). These community foundations are not necessarily representative of all rural community foundations. Rather, these community foundations were selected based on a series of key criteria. Both rural community foundations illustrate unique patterns related to history, assets, and practice.



Figure 4. Map of Case Studies

Brief descriptions of both community foundations are presented after the discussion on how the two rural community foundations were selected.

#### Selection of Cases

Four criteria were utilized in selecting the two cases.

#### Length of History

To ensure community foundations had sufficient history of practice was a key consideration. Previous research on rural community foundations in Canada suggested the process and activities of setting up a community foundation take at least 5-6 years to up and running smoothly (Gibson and Shanghvi, 2009). As a result, only rural community foundations with at least seven years of establishment were considered.

The pattern of rural community foundation establishment is quite distinct in Canada, as noted previously in Figure 2. The average year of establishment for rural community foundations was 1998. To capture the diversity in when rural community foundations were established one rural community foundation was selected from before 1998 and one rural community foundation from after 1998.

#### Financial Endowment

Community foundations require time to build their endowments. Evidence from the Atlantic region's community foundations suggested that the needs and opportunities of community foundations changes once the value of assets exceeds \$1,000,000 (Barrett and Gibson, 2014). Based on this notion, only rural community foundations with total financial assets exceeding \$1,000,000 according to their 2012 submission to the Canada Revenue Agency were considered.

#### Diversified Granting Priorities/Experiences:

The rural community foundations needed to demonstrate a diverse range of granting priorities or experiences to be considered. The diversity of granting priorities and experiences demonstrates a wide range of engagements of the foundation in the community/region.

#### Geographical Diversity

The cases were selected to avoid having both in the same geographical region of Canada.

Based on these four criteria, the Sussex Area Community Foundation and the Virden Area Foundation were selected. A brief description of each rural community foundation is presented below.

#### Sussex Area Community Foundation

Sussex Area Community Foundation was established in 2004 and is located in the community of Sussex, New Brunswick. As of 2011, Sussex had a population of 4,312. As a regional foundation, however, Sussex Area Community Foundation has been dedicated to serving the people within the communities of Sussex Corner, Apohaqui, Norton, Sussex and other surrounding areas, helping a population of approximately 20,000 people and encompassing an area over of 200 square kilometers (Statistics Canada, 2013).

In the past fifteen years, the population of Sussex has primarily stayed the same. In 1996, the population of the community was 4,293. Five years later, it decreased by 2.6%, down to 4,182. However, 2006 saw another increase in population, rising 1.4% to 4,241. Similarly, population numbers rose again by 2011, where a 1.7% gain brought it to the number of residents living in Sussex today (Statistics Canada, 2013).

Unlike Virden Area Community Foundation, Sussex Area Community Foundation has few granting priorities, focusing particularly on health and education throughout their grant-making initiatives. In 2013, Sussex Area Community Foundation contributed to the Health and Wellness Program at Sussex Regional High School by distributing funds so the program could purchase five new spin bikes to add to their exercise machines. In addition, through the grants contributed by Sussex Area Community Foundation, the Health and Wellness Program has been able to purchase a Bowflex Tred Climber, adding more modern technology in their exercise program. By doing so, they hope students will be encouraged to actively engage in exercise programs on school grounds (Sussex Area Community Foundation, 2013).

Since their inception, Sussex Area Community Foundation has committed to delegating grants to student scholarships. This trend continued into 2012 and 2013. At the end of the school year, the foundation provided five scholarships valued at \$2,500 to students graduating from Sussex Regional High School to assist in the costs of post-secondary tuition. Additionally, five Fran Simpson Scholarships were awarded to high school graduates, again channeled through Sussex Area Community Foundation. Furthermore, two students received the Earl J. Cunningham Scholarship and the Steven Skaling Memorial Award, (Sussex Area Community Foundation, 2013).

Since 2004, the total assets of Sussex Area Community Foundation have grown exponentially. After it's first ten years, the foundation has total assets worth \$1,350,336 and has distributed over \$300,000 in grants. With these assets, they have been able to positively impact the residents of Sussex. This includes the recent events that occurred in May 2013, where they provided eleven grants valued at \$15,750 to distribute the local community in ways mentioned above (Sussex Area Community Foundation, 2013).

#### Virden Area Foundation

Virden Area Foundation was incorporated in 1992 and is located in the community of Virden, Manitoba. As the Statistics Canada 2011 census report identifies, Virden's population was 3,114 in 2011 (2013). Virden Area Foundation has always been committed to providing care for people in need throughout the town of Virden, encompassing 8.56 square kilometers.

The population of Virden has remained relatively consistent over the past fifteen years. Their population in 1996 reached 3,137, one of the highest populated points in the town's history. By 2001, the population gradually decreased 0.9%, to 3,109. Five years later, the population decreased once again, down 3.2% to 3,010. However, the 2011 results show the population is on the rise again, up 3.5% in five years to 3,114 (Statistics Canada, 2013).

Virden Area Foundation is engaged in a number of ways to help strengthen the residents of their region. Some of their grants are designated towards restoring the heritage by upgrading their local museums. Other priorities include distributing scholarships for high school students and providing funding for new health services. However, most of their grants are directed towards sports and recreation. In 2009, the foundation contributed \$150,000 towards building a new arena complex, the Tundra Oil and Gas Place. Additionally, they have provided financial support for students and clubs to help improve access to recreation (Virden Area Annual Report, 2010).

Virden Area Foundation continues to be an asset for the people of Virden. Since their inception in 1992, the foundation has \$1,512,293 in revenue. Over the last five years, they have been providing a minimum of \$25,000 in grants annually. Some of these include large gifts such as \$150,000 towards a new sports complex, or multiple \$1,000 gifts as scholarships (Virden Area Annual Report, 2010).

## The Frontline of the Intersection of Philanthropy and Rural Development

To enhance the understanding of how rural community foundations participate in the revitalization and sustainability of their communities a series of discussions were held. Interviews with community foundation board members, staff, and grant recipients. The discussions focused on the impacts of the foundation on their communities, connections to other local stakeholders, opportunities and challenges encountered, and future desired achievements. Based on these discussions the findings have been organized in six themes, each described below.

## Impact of Community Foundations on Rural Revitalization and Sustainability

The Sussex Area Community Foundation and the Virden Area Foundation both illustrated numerous manners in which they contribute to the sustainability and revitalization of their community. This impact was described in terms of both financial contributions and in-kind contributions to community-led initiatives. In discussion with board members, staff, and grant recipients it was rare for the terms 'sustainability' or 'revitalization' to be used to describe their activities or the outcomes of their activities.

On an annually basis both community foundations noted giving financial grants to a wide variety of activities, each responding to opportunities and challenges in their communities. In 2012, a total of \$79,768 was distributed to qualified donees: \$52,852 by the Sussex Area Community Foundation and \$26,916 by the Virden Area Foundation. These funds support activities such as scholarships to local students to pursue post-secondary education, services for elderly people, mental health service delivery, recreation facilities, historical preservation, and playground equipment. One board member noted their foundation tries to "contribute to community infrastructure –things that will last in the community".

Grant recipients described the financial support provided by the community foundations as pivotal. Often projects supported by the community foundations have limited options for funding due to the nature of their initiative. Grant recipients noted that the community foundations are more responsive to local issues, something too often missing from funding agencies located in provincial capitals and elsewhere. The ability to have a funding agency on their local main street was seen as a tremendous asset.

In addition to being knowledgeable of local priorities and challenges, the financial grants of the community foundation have facilitated activities and services that would have otherwise not been possible. One board member commented, "Without the foundation's support there are a number of initiatives that would never have taken place in the community." Grant recipients echoed this sentiment: "The foundation's support is key for us and our clients. It means residents do not need to leave the community for support."

The impact of both community foundations is not limited to only financial support. Both community foundations provided illustrations of their in-kind contributions to local initiatives. Both community foundations appoint board members to participate on community-based organizations, such as the local chamber of commerce or health and well-being committees. Board members are able to share information about their foundation, connect to community-wide initiatives, and learn about the priorities of other organizations.

Although both foundations are making substantial financial and in-kind contributions to their communities, neither necessarily viewed themselves as contributing to 'revitalization' or 'sustainability'. These terms were rarely utilized to describe their work, plans, or activities. One member noted, "the foundation not list revitalization as a priority *per se*, but it is clearly an objective we aim towards'. Community foundation board members and staff often used parallel terms such as 'community development', 'local improvements', and 'helping the community' to describe their work. Interesting during all of the interviews no board member or staff member used the terms 'rural development' or 'regional development' to describe the work being done by the foundations.

## Connection Between Community Foundations and Local Actors

The communities of Sussex, New Brunswick and Virden, Manitoba are vibrant communities, home to many local economic, social, and environmental development actors. These actors include, but are not limited to, local governments/municipalities, social organizations (e.g. hospital boards, well-being committees), nonprofit organizations (e.g. service clubs), environmental organizations (e.g. watershed management and conservation districts), and businesses (e.g. chamber of commerce). Both community foundations noted they interact, both formally and informally, with these community-based actors for a variety of reasons, information sharing being the primary reason.

These multi-stakeholder platforms forums provide an opportunity for community foundations to learn about planned activities, changes to existing programs, and discuss community priorities. These discussions are brought back to the community foundations and influence their discussions and decision-making. Although information sharing takes place both community foundations explained it would be infrequent to partner with another local actors to co-fund an initiative. Boards with both community foundations

noted in many instances a specific project receives funding from more than one agency, however, it is at the discretion of the applicant to submit multiple applications. Given the rural realities discussed earlier, it is not surprising a Sussex Area Community Foundation board member noted, "In small rural areas in order for your resources to make maximum impact it is important for you to partner with other groups."

The Virden Area Foundation is taking a leadership role in developing a new daycare facility in the community to respond to local needs. The board of directors recently passed a resolution confirming their support of the initiative and will now be working with other local partners to bring this idea to fruition. Board members quickly noted the time and finances required to for this initiative exceed the capacities of the Virden Area Foundation. That being said, as a respected agency in the community, the foundation can provide leadership and a financial commitment towards the initiative.

Another interesting role the Virden Area Foundation has played recently is the receiver of funds from non-operational community-based organizations. When a nonprofit organization recently decided to disband it approached the community foundation to transfer their remaining funds into the endowment. The wishes of the organization were to have the interest generated from the funds be awarded to initiatives that paralleled their mandate.

#### Recognizing and Capturing Local Financial Capital

Rural communities across Canada are often depicted as declining, cash-strapped, and dependent on urban centres or government for their continued survival. Stories of this nature frequently grace newspapers and other forms of media. Although there are indeed rural communities in these situations there is substantial wealth in many rural communities. Too often, however, this wealth is not recognized as an asset.

This asset often takes many shapes, such as investments, property, and land and/or subsurface rights. This wealth is most visible when planning for estates. The

stories of the Sussex Area Community Foundation and the Virden Area Foundation demonstrate there is substantial financial capital in their rural communities. The trick, and challenge, is recognizing this financial capital and building plans for capturing a piece of it before it exits the community. Often the children of rural residents have migrated to other communities upon graduation secondary school. As estates are dispersed, too often the financial assets in rural communities depart.

Communities throughout Canada have become increasingly aware of the intergenerational transfer of wealth. This concept has received increasing attention since the Havens and Schervish's (1999) report *Millionaires in the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy*. This seminal report identified that intergenerational transfer of wealth have time sensitivities: once wealth has left a community it is difficult to bring it back. The key factors influencing this intergenerational wealth transfer are current levels of wealth in the community, age of residents, and reputation the charity. Throughout the United States Havens and Schervish's report was the catalyst for a series of wealth transfer studies (cf. Macke et al., 2007; Montana Community Foundation, 2011; Nebraska Community Foundation, 2012). Unfortunately, few intergenerational wealth studies have been conducted in Canada; let alone in rural Canada (Rural Development Institute, 2011). As a result credible evidence on this topic is not available to rural community foundations, which in turns leads many community foundations to be concerned about capturing a portion of this wealth (Barrett and Gibson, 2014).

Intergenerational wealth transfer has been discussed by both community foundations and both, not unsurprisingly, wish to capture as much of this wealth as possible. Both community foundations have informal strategies to facilitate capturing the intergenerational wealth strategies. A board member with the Virden Area Foundation explained their strategy: "We strive to have a good profile in the community and we rely on our impact to convey why the foundation is important". In a similar fashion, the Sussex Area Community Foundation is hosting a gala event in the Fall 2014 to heighten the awareness of the foundation, its activities, and the impact for the communities. Both community foundations noted receiving a portion of the anticipated intergenerational

wealth transfers would considerably heighten their impact on their respective communities.

## "Picking up Pieces" after the Perceived Abdication of Government

On an annual basis both community foundations distribute funds to qualified donees, typically community organizations, based on a call for applications. Unfortunately, each year both foundations receive more requests than they have finances to fund. Both community foundations noted their disappointment they cannot provide financial assistance to all requests they receive. Over the past decade community foundations noted they have begun to receive an increasing number of requests for funds to provide services and programs that were once the responsibility of either the provincial and/or federal governments.

Fiscal austerity at all levels of government has created a need for government to adjust their budgets. As was noted by one board member, "this realignment is a lot of the time at the detriment of social groups that need help the most". Services and projects that were in the past completely supported by government now have to find their own dollars to deliver needed activities in the community. Examples of services and programs that have fallen into this category include mental health services, hospital equipment, and school playgrounds. As the trends in rural Canada (economic restructuring, mobility, and decline of rural institutions) continue, some community foundation board members noted they are perceived as "filling in the funding gaps left when government stopped supporting these services".

Filling these funding 'gaps' is an important role community foundations can provide their communities, which in turn demonstrates their impact and value. At the same time a number of board members noted caution. One board member referred to it as a "slippery slope", as they believed that once the community foundations starts supporting these initiatives two challenges emerge. First, at the community-level, these

organizations will require annual funding to perform their valuable services and programs. In essence the community foundation could become "locked" into continued support for the initiative, of which there is a clear need in the community. Second, at the government-level, is the concern that by supporting these valuable organizations the community foundations are complacent in the government's strategy of "off-loading" financial responsibilities to the local level. The concern is that the pattern of "off-loading" would continue with other programs and services in rural areas. Jokingly, one board member exclaimed, "community foundations are not designed to be fill the role left by governments in rural areas".

Humour aside, it was noted that the support of organizations providing programs and services that were once the responsibility of government hinders the ability of community foundations to be forward thinking and support revitalization<sup>3</sup>. By "picking up the pieces after the departure of government" community foundations become pivotal in maintaining the current suite of services and programs through financial support. This financial support, in turn, limits the funds available for the community foundations to be proactive in addressing long-term community priorities.

#### "It Costs Money to Make Money, It Costs Money to Give Away Money"

Surprising to most, but the act of collecting money and dispersing money has a considerable cost associated. Community foundations, similar to all other charities, incur expenses such as accounting processes, audit preparation, or personnel to coordinate the communications. Community foundations need to contend with this dilemma as they explore methods to enhance their endowments and as they disperse grants to the community.

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<sup>&</sup>lt;sup>3</sup> This board member referenced revitalization at the conclusion of the interview after being asked to comment directly on the term.

Enhancing a community foundation's endowment is time consuming. It often relies on personal connections between potential donors and the community foundation. It takes time to build and maintain these relationships. Even after a relationship is established it may take considerable time before a donation is made, particularly if the donation is part of an estate. Community foundations then must make decisions regarding how much of the interest generated from their endowment should be invested in the administration of the community foundation. Both community foundations employ a part-time executive director to facilitate the operations of the foundation and the board. Both community foundations also described the challenges of locating and allocating funds for administration. As one board member stated, "every dollar spent on administration from the interest generated on the endowment is one less dollar invested into the community".

## "We are a Small and Active Group with Big Plans for our Community": Looking to the Future

Although geographically located in opposite sides of the country board members of the Sussex Area Community Foundation and the Virden Area Foundation voiced similar aspirations for the future. Both community foundations believed the good work completed in their communities would continue, as would their impacts on the communities. Beyond this goal, four specific goals were mentioned

Over the next ten years, both community foundations spoke of the desire to have an **enhanced knowledge** of the community foundation movement and philanthropy within their communities. Currently both community foundations noted individuals working with or receiving funds from the community foundations have a higher knowledge, while some in the community would have a very limited knowledge. Given the emphasis on relationships a lack of knowledge of community foundations will pose greater challenges to building their respective endowments. A key group both community foundations wish to increase their engagement with is youth and young adults (described

as "non-seniors" by one board member). The Sussex Area Community Foundation facilitates the "Random Acts of Kindness" program in all schools in the region and the Virden Area Foundation has been benefited from the participation of "non-seniors" on the board of directors.

In addition to enhancing the understanding of community foundations within their respective communities, both foundations alluded to the need to advance the understanding and **support from government**. In 2013, the Governor General of Canada announced the Smart and Caring Campaign to encourage Canadians to transform the country through simple acts<sup>4</sup>. Philanthropy, and in particular community foundations, have been a natural fit with the Smart and Caring Campaign. Community foundations across the country have benefited from the attention paid to philanthropy through this initiative. Community foundation board members noted a similar support from provincial and federal government departments and agencies would be appreciated. Their support would enhance the legitimacy of community foundations, which in turn benefits endowments.

The third future goal is to **grow their endowments**. Increased endowments permits the community foundation to provide more funds to organizations in their communities. Investing more funds in the community will help to advance awareness of the community foundation, which in turn, helps to build the endowment. Both community foundations spoke to intergenerational transfers of wealth as a key element to the growth of their endowment. As one Virden Area Foundation board member noted, "the dynamics in the community positioned for us well for increased growth: our community has substantial wealth and the community is aging". In the Sussex Area Community Foundation a similar observation was made towards endowment growth. The community foundation is aware of a few individuals who plan to bequeath part of their estate, however, there is uncertainty when the funds will be received.

<sup>&</sup>lt;sup>4</sup> Further information on the Smart and Caring Campaign can be found at http://mygivingmoment.ca.

The final goal for the future is for the community foundation to be seen as providing strategic community leadership. Both the Sussex Area Community Foundation and the Virden Area Foundation want to be seen by residents and organizations within their communities and by external organizations as leading positive change for their communities. They want to be seen as an organization that are well understood and that are seen as "movers and shakers" in the community. Both community foundations envision this will be delivered by engaging with multiple partners to bring about positive changes in their communities.

## Summary

Rural communities throughout Canada are adjusting to changing economic, social, and environmental dynamics. Rural communities are confronted with both challenges and opportunities associated with economic restructuring, increased mobility, and the decline of rural institutions. This turning point, create through these current trends, provides opportunities for philanthropy and community foundations.

Prior to examining the role of community foundations to sustain and revitalize their communities a definition was required. Defining who constitutes a rural community foundation is a long overdue accomplishment of this research. A solid understanding of who constitutes this category facilitates further research into understanding the unique challenges and opportunities confronting rural community foundations. Although rural community foundations were established almost fifty after the first urban community foundation they have proliferated across the country since the 1980s, currently with 83 rural community foundations.

The goal of this project was to examine how community foundations can influence and participate in regional development in rural areas to support revitalization and sustainability. The narratives from the Sussex Area Community Foundation and the Virden Area Foundation clearly indicate they are both active in supporting, facilitating, and financing their communities. Each community foundation supports a wide variety of local initiatives, ranging from scholarships, to health services, to recreation facilities, to

historical preservation. In just 2012, these two community foundations provided over \$79,000 in grants to qualified donees in their communities. The nature of community foundations, whereby endowments are typically not spent, means these communities will continue to receive similar annual investments. Growth of their endowments would enable the community foundations to increase their investments into their respective communities.

Although both community foundations were active in their community, neither immediately saw themselves as contributors to their community's revitalization or sustainability. The work undertaken and the benefits accrued by the community foundation clearly align with the terms revitalization and sustainability. Upon discussion board members and staff all concurred they were engaged in these types of activities but often used different terms to describe the same phenomenon. Community foundation board members often referred to their activities in language like community development and social development. This report outlines the various methods community foundations are participating in the intersection of philanthropy and rural development: supporting initiatives that support community sustainability and revitalization, building connections to other community-based organizations, planning for future endowment growth to maintain their financial contributions to the community's priorities, and taking a leadership role in the future of their communities.

## Recommendations for Enhancing the Intersection of Community Foundations and Rural Development

The narratives from both the Sussex Area Community Foundation and the Virden Area Foundation demonstrated their commitment to their communities and identify the current roles they are playing in sustaining and revitalizing their communities. Their perspectives also shed light on a series of recommendations for enhancing the intersection of community foundation and rural development.

- Explore the expansion of the community foundation movement to rural communities and regions not currently served by a community foundation.
- In enhancing community foundations' influence on rural sustainability and revitalization rural community foundations requires active engagement with other local and/or regional organizations.
- Rural community foundations need to communicate with each other and serve as
  an interest group to provincial and federal governments to influence policy and
  programs that can assist to the sustainability of their regions.
- Rural community foundations need to share their stories with larger audiences, both within their communities and nationally. Too often rural community foundations are addressing similar issues but not have the opportunity to learn from each other. Due to limited financial endowments and a desire to maximize local investments, rural community foundation board members and staff noted limited participation in sharing forums.
- The intergenerational transfer of wealth needs to be better understood in rural communities and regions to allow credible information to be used in building plans and policies. Without data planning for this transfer is difficult. Likewise, accurate data on intergenerational wealth transfers would serve to help community foundations understand the time sensitivities associated.
- More research on rural community foundations in Canada is required to better understand the challenges and opportunities confronting this unique group. Each rural community is unique: different income levels, different age of community residents, and different history of philanthropy. Factors such as these each influence how community foundation support, maintain, and revitalize their communities.

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## Appendix A: Table of Rural Community Foundations

Name	Province
Aylmer Area Community Foundation	Ontario
Beautiful Plains Community Foundation Inc.	Manitoba
Big Grass Community Foundation Inc.	Manitoba
Birtle and District Foundation Inc.	Manitoba
Brokenhead River Community Foundation Inc.	Manitoba
Bulkley Valley Community Foundation	British Columbia
Caledonia Community Foundation	Ontario
CampbellIford/Seymur Community Foundation	Ontario
Carberry and Area Community Foundation Inc.	Manitoba
Carleton North Community Foundation	New Brunswick
Clayoquot Blosophere Trust	British Columbia
Coldwell Community Foundation	Manitoba
Columbia Valley Community Foundation	British Columbia
Community Foundation of Portage and District Inc.	Manitoba
Community Foundation of Swan Valley Inc.	Manitoba

Name	Province
Community Foundation of Whistler	British Columbia
Creston - Kootenay Foundation	British Columbia
Cypress River & Area Foundation Inc.	Manitoba
Dauphin & District Community Foundation	Manitoba
Drayton Valley Community Foundation	Alberta
Elkhorn & Area Foundation	Manitoba
Family & Friends Community Foundation Inc.	Saskatchewan
Fondation communautaire de la Péninsule acadienne Inc.	New Brunswick
Fondation Communautaire de Temiskaming	Ontario
Fondation communautaire Gaspésle - Les - Îles	Quebec
Forest Community Foundation	Ontario
Fundy Community Foundation	New Brunswick
Golden & District Community Foundation	British Columbia
Grand Bend Community Foundation	Ontario
Grandview & District Community Foundation	Manitoba
Haida Gwaii Community Foundation	British Columbia
Holland & Area Community Foundation Inc.	Manitoba
Icelandic River Community Foundation	Manitoba
Kent Harrision Foundation	British Columbia
Kimberley and District Community Foundation	British Columbia
Kitimat Community Foundation	British Columbia
La Fondation communautaire de Hearst Community Foundation	Ontario
Lac du Bonnet and District Foundation	Manitoba
LeRoi Community Foundation	British Columbia

Name	Province
Living Legacy Community Foundation	Manitoba
Mayerthorpe Area Community Foundation	Alberta
Miami and Area Foundation Inc.	Manitoba
Minnedosa & District Foundation Inc.	Manitoba
Morden Area Foundation Inc.	Manitoba
Nakusp and Area Community Foundation	British Columbia
Napanee District Community Foundation	Ontario
North Norfolk - MacGregor Foundation Inc.	Manitoba
North Thompson Communities Foundation	British Columbia
Northern Neighbours Foundation, Inc.	Manitoba
Oak Lake & Area Foundation Inc.	Manitoba
Oxbow Community Foundation	Saskatchewan
Parksville-Qualicum Foundation	British Columbia
Pembina - Manitou Area Foundation Inc.	Manitoba
Phoenix Foundation of the Boundary Communities	British Columbia
Pilot Mound & District Foundation Inc.	Manitoba
Pinawa Community Foundation Inc.	Manitoba
Plum Coulee Community Foundation	Manitoba
Prince Edward County Community Foundation	Ontario
Reston and Area Foundation Inc.	Manitoba
Revelstoke Community Foundation	British Columbia
Rivers and Area Community Foundation	Manitoba
Robin District Community Foundation	Manitoba
Rural Communities Foundation of Nova Scotia	Nova Scotia
Selkirk & District Community Foundation	Manitoba

Name	Province
Souris Glenwood Foundation Inc.	Manitoba
Sturgeon Community Foundation Inc.	Manitoba
Sunshine Coast Community Foundation	British Columbia
Sussex Area Community Foundation Incorporated	New Brunswick
The Altona Community Foundation Inc.	Manitoba
The Banff Community Foundation	Alberta
The Boissevain and Morton Foundation Incorporated	Manitoba
The Carman Area Foundation Inc.	Manitoba
The Cartwright and Area Foundation Inc.	Manitoba
The Deep River and District Community Foundation	Ontario
The Glenboro Area Foundation Inc.	Manitoba
The Interlake Community Foundation Inc.	Manitoba
The Perth and District Community Foundation	Ontario
The Southwest Manitoba Regional Foundation	Manitoba
The Temagami Community Foundation	Ontario
Thompson Community Foundation	Manitoba
Tiger Hills Community Foundation Inc.	Manitoba
Virden Area Foundation Inc.	Manitoba
Wawanesa Community Foundation	Manitoba
Westshore Community Foundation Inc.	Manitoba