



**Burns**  
**Memorial Fund**

*A legacy for Calgary's children*

# Annual Report 2021



## ABOUT US

Burns Memorial Fund is the legacy of Senator Patrick Burns—a Calgary pioneer and philanthropist who passed away in 1937. Today, we carry on his work through three Funds:

The Police and Fire Funds support the educational achievements of the children of police officers and firefighters.

The Children's Fund focuses on the health, education and recreation needs of low-income children and youth.

We are guided by the following mission statement:

Honouring the legacy of Senator Patrick Burns, we work to ensure that each child in Calgary reaches their full potential. By investing resources in the areas of education, health and well-being, we build a strong community for our children and youth.



In the spirit of respect and reconciliation, Burns Memorial Fund acknowledges that we are based in Treaty 7 territory, the ancestral and traditional territory of the Blackfoot Confederacy (Siksika, Kainai, Piikani), the Tsuut'ina, the Stoney Nakoda Nations, and Métis Nation, Region 3.



**"I want to once again thank the Burns Memorial Fund Scholarship for giving me this opportunity as well as future students the same opportunity that I had. My first-year post-secondary education would not have been the same without this scholarship."**

**-Senator Patrick Burns Legacy Scholarship recipient**

## A MESSAGE FROM THE EXECUTIVE DIRECTOR

I have been privileged to lead Burns Memorial Fund (BMF) for the last 14 years, allowing me to witness first-hand the resilience and strength of Calgary's children, youth and families. Thanks to Senator Burns' legacy and foresight, our organization is uniquely positioned to support vulnerable young people as they build fulfilling, meaningful lives.

BMF works strategically at three levels. Unusual amongst funders, we provide financial assistance directly to individuals in need. We also support local charities working with low-income children and youth, and we engage in comprehensive community collaborations to address the systemic issues affecting the people in our programs. What that means, in practical terms, is that we can identify barriers affecting individual Calgarians and then work with our community partners to tackle the root causes of those problems.

Over my time at BMF, we have engaged in many high-impact partnerships. I have been particularly proud of our work with the Collaborative Funders' Table - experimenting with pooled funding, shared decision-making, and human-centred design principles to support effective after-school programs and improve employment opportunities for vulnerable youth. We have also spent more than a decade championing the Natural Supports approach. It has been gratifying to see this work gain traction. Organizations and institutions in Calgary and Edmonton are implementing the concepts; the City of Calgary is promoting the importance of naturally supportive communities; and many of us have become Social Snackers!

There is still much to be done. The BMF Board of Trustees recently approved our anti-racism strategy. As part of that work, we have engaged in an audit of our policies, programs and procedures that I am confident will lead to stronger services, new partnerships, and even better outcomes for the children, youth and families in our programs.

Kendall Quantz, our incoming Executive Director, is well-positioned to lead this work. She has a deep understanding of the challenges and opportunities facing our community, honed over many years of leadership in the non-profit sector. Working with our talented staff team and our skilled Board of Trustees, Kendall will expertly guide the organization forward. Senator Burns' legacy is in good hands!



**Michelle Clarke,**  
Executive Director  
Burns Memorial Fund

## REPORTS FROM THE CHILDREN'S, FIRE, AND POLICE FUNDS

2021 was a year like no other. For a full year, our community grappled with the challenges of the pandemic, adapting as best we could to ever-changing conditions and requirements. Students dealt with isolation, uncertainty, and the anxiety caused by repeated moves from in-class to remote learning. Families worried about their children's well-being while facing economic instability. At the same time, we were privileged to witness inspiring resilience; students and families drew on internal strengths and community networks to make it through the second year of the global pandemic.

Burns Memorial Fund remained responsive and flexible throughout this unpredictable year. Our charitable foundation, the Children's Fund, continued to offer vulnerable young people financial assistance and other supports necessary for healthy and fulfilling lives. We augmented our usual grants with funds for technology to assist with online learning, as well as crafts, books, toys, games and sporting equipment to engage children in fun and meaningful activities at home. The Police and Fire Funds honoured Senator Burns' respect for police officers and firefighters, awarding post-secondary scholarships and special needs grants to their children.

We would like to thank our retiring Executive Director, Michelle Clarke, for her leadership and guidance throughout the pandemic and for her dedication to Burns Memorial Fund and the people we serve over the last 14 years. We are pleased to welcome Kendall Quantz, our current Grants Manager, as our incoming Executive Director. We know that Kendall has the experience, empathy and skill to lead us ably into the future, honouring Senator Burns' vision of a community in which all children and youth thrive.



**Steve Dongworth,**  
**Fire Chief**  
**Chair, Burns Memorial Fund and Burns Fire Fund**



**Katie Black,**  
**General Manager, Community Services,**  
**City of Calgary**  
**Chair, Burns Children's Fund**



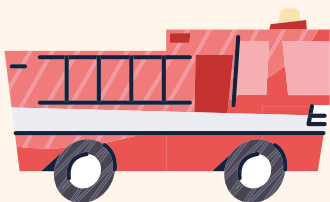
**Mark Neufeld,**  
**Police Chief**  
**Chair, Burns Police Fund**



**98 students**, at risk of dropping out of grade 12 for financial reasons, received monthly living allowances. **7 students** in financial need were awarded post-secondary scholarships. **7 bursaries** helped youth transition into further education, training and employment.



**25 children** were assisted with oral health treatment costs.



**132 scholarships** and **11 special needs grants** were awarded to the children of firefighters.



**9 community agencies** partnered with us in Families Moving Forward to meet the health, education and recreation needs of **237 low-income children and youth**.



**9 charities**, working with almost **9,000 children and youth**, received Community Grants.



**214 scholarships** and **17 special needs grants** were provided to the children of police officers.

## STUDENT SUCCESS

The **High School Bursary program** (HSB) supports high school students in their journey to graduation. Through this program, grade 12 students in financial need can access the resources they need to stay in school and succeed in their education. Grant funding includes a monthly living allowance, as well as funds for diploma exam preparation, medical expenses, post-secondary application fees, and other needs.

Erica was living on her own and working multiple jobs to support herself when she was referred to the High School Bursary program. Through the financial support of the program, Erica was able to work fewer hours and focus on her schoolwork. She also had the time to participate in competitive sports again, something she had been unable to do since being forced to live on her own. The HSB program provided Erica with eight months of living allowance support, as well as funding for glasses, graduation expenses, and application fees for university.

Thanks to her hard work and perseverance, Erica was accepted into both the University of Calgary and the University of Toronto honours program! Today, she is studying Law and Society, excelling in her courses on the way to becoming a criminal defense lawyer. Busy as ever, working and attending university, Erica is always looking for ways to give back and support other students, saying: **“I would love to help out. You guys did so much for me and I really wouldn’t have made it last year without the help you guys gave me.”**



## FAMILY RESILIENCE

The **Families Moving Forward Program** (FMF) provides three years of grant funding to low-income families to meet their children's health, education and recreation needs. The grants are intended for families already engaged with community agencies and working towards self-sufficiency.

Heather and Jonathan are parents to four beautiful young children. They are a happy, fun-loving family who enjoy being active and engaging in sports and the outdoors. The past few years, however, have been very difficult for them. In January 2018, the family lost a young child due to complex medical issues. They were still dealing with their loss when the pandemic hit. Jonathan's income as a self-employed welding contractor was abruptly and significantly reduced which made it difficult to meet all of the children's needs.

The family was referred to the FMF program in 2020. The program assisted with the children's school fees and learning supplies. The family also utilized grant funding to engage in fun family bonding activities- camping, exploring provincial parks, and at-home arts and crafts. When recreation facilities reopened, the program helped with the cost of the children's hockey and swimming programs. Through the sponsorship of a BMF community partner, Kids Up Front, the family was also able to attend a Calgary Flames game and watch their favourite team win! This strong and resilient family thrived in the FMF program, and used the support of this program to heal and connect. Jonathan recently got a welding job and is working toward rebuilding their financial stability. The couple have this to say about the program:

**"When our son Jasper passed away in 2018, my husband and I made it a priority of our grief journey to bring joy back into our children's hearts and smiles back onto their faces. We were unable to work, and while we had all the time in the world to spend with them, it wasn't enough. We were referred to Burns Memorial Fund and the past 3 years have not only changed the lives of our children, but ours as well. We are together as a strong family today because of the opportunity BMF provided us, our light is because of you."**



## STAFF



**Michelle Clarke,**  
*Executive Director*



**Hanna Moraru,**  
*Office Manager*



**Kendall Quantz,**  
*Grants Manager*



**Faye San Jose,**  
*Grants Coordinator*



**Sidrah Anees,**  
*Communications & Grants Coordinator*

**Recently retired:** Jackie Davis & Charlotte Chesnut. Thank you for your many dedicated years of service!

## BOARD OF TRUSTEES



**Chief Steve Dongworth**  
*Chair, Burns Memorial Fund, Burns Fire Fund Fire Chief, City of Calgary*



**Jill S. Floen**  
*Vice-Chair, Burns Memorial Fund, City Solicitor and General Counsel, City of Calgary*



**Katie Black**  
*Chair, Burns Children's Fund General Manager, Community Services, City of Calgary*



**Chief Mark Neufeld**  
*Chair, Burns Police Fund Police Chief, City of Calgary*



**Carla Male**  
*Chief Financial Officer, Finance, City of Calgary*



**John Orr**  
*President, Calgary Police Association*



**Codey McIntyre**  
*President, Calgary Firefighters Association*



*Her Worship Mayor*  
**Jyoti Gondek**  
*City of Calgary*



**"This program is an amazing opportunity for families like us. It helped more than anything I could have imagined. I was struggling with so many things. I was finally able to give the kids some opportunities I normally couldn't.**

**This actually made the world of a difference."**

**-Families Moving Forward program participant**



## PARTNERS & FRIENDS

A sincere thank you to all of our partners and donors. Together, we build a strong community for children and youth in Calgary.

### Families Moving Forward Partners

- Calgary Catholic Immigration Society
- Calgary Immigrant Women's Association
- Discovery House
- EnviroS
- North East Family Connections Society
- Salvation Army
- South East Calgary Community Resource Centre
- Trellis
- YW Calgary

### Grant Recipients

- Calgary Reads
- carya
- Centre for Sexuality
- Cerebral Palsy Association
- CUPS
- Indian Residential School Survivors Society
- Scientists in School
- Trellis
- Umoja Community Mosaic

### Funding Partners and Donors

- ATCO Electric - Distribution
- Calgary Foundation
- Calgary Neighbourhoods, City of Calgary
- Chris Good
- Integro Legacy Fund
- JPMorgan Chase Foundation
- Max Bell Foundation
- Michelle Clarke and Chris Gadsby
- Pam Andrew Marks High School Bursary Fund
- RBC Foundation
- Ruth Ramsden-Wood Education Fund
- United Way of Calgary and Area
- United Way of Calgary, Donor Choice Program
- Watson Family Foundation at The Calgary Foundation

# FINANCIAL STATEMENTS



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Calgary AB T2P 0P7 Canada

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## INDEPENDENT AUDITOR'S REPORT

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To the Trustees of Burns Memorial Fund:

### *Opinion*

The accompanying summary financial statements, which comprise the summary statement of financial position as at December 31, 2021 and the statement of operations are derived from the audited financial statements of the following individual funds (collectively referred to as the "Funds") of Burns Memorial Fund for the year ended December 31, 2021:

1. The Burns Memorial Fund for Children
2. The Burns Memorial Fire Fund
3. The Burns Memorial Police Fund

In our opinion, the accompanying summary financial statements are a fair summary of the financial statements in accordance with Canadian accounting standards for not-for-profit organizations. However, we were not able to determine if any adjustments to the summary financial statements were necessary for the reasons described in *The Audited Financial Statements and Our Report Thereon* section of this audit report.

### *Summary Financial Statements*

The summary financial statements do not contain all the disclosures required by Canadian accounting standards for Not-for-Profit. Reading the summary financial statements and the auditor's report thereon, therefore, is not a substitute for reading the following audited individual fund financial statements and individual auditor's reports of Burns Memorial Fund:

1. The Burns Memorial Fund for Children
2. The Burns Memorial Fire Fund
3. The Burns Memorial Police Fund

The summary financial statements and the audited financial statements of the Funds do not reflect the effects of events that occurred subsequent to the date of our report on the audited financial statements of the Funds.

### *Management's Responsibility for the Summary Financial Statements*

Management is responsible for the preparation of the summary of the audited financial statements of the Funds in accordance with Canadian accounting standards for Not-for-Profit organizations.

### *Auditor's Responsibility*

Our responsibility is to express an opinion on whether the summary financial statements are a fair summary of the audited financial statements of the Funds based on our procedures, which were conducted in accordance with Canadian Auditing Standard (CAS 810), *Engagements to Report on Summary Financial Statements*.

*BDO Canada LLP*

Chartered Professional Accountants

Calgary, Alberta  
March 14, 2022

# FINANCIAL STATEMENTS

**The Burns Memorial Fund**  
**Summarized Statement of Operations and Changes in Net Assets**  
**For the year ended December 31, 2021**

	Children		Fire		Police	
	2021	2020	2021	2020	2021	2020
<b>Revenue</b>						
Income from Burns Memorial Trust	\$405,137	\$402,037	\$405,137	\$402,037	\$405,137	\$402,037
Donations and grants	197,894	210,876	-	-	-	-
Cost recovery (partnership)	35,000	35,000	-	-	-	-
Investment and other income	118,034	53,143	101,039	55,980	78,828	41,531
	<b>756,065</b>	<b>701,056</b>	<b>506,176</b>	<b>458,017</b>	<b>483,965</b>	<b>443,568</b>
<b>Expenses</b>						
Grants	525,247	549,009	308,893	353,850	263,587	277,200
Program and facility costs	176,387	167,456	168,967	160,661	168,970	161,117
Professional fee	44,886	27,307	44,063	25,985	43,476	25,426
Amortization	1,217	4,669	1,213	4,671	1,214	4,670
Interest and bank charges	-	-	453	-	448	-
	<b>747,737</b>	<b>748,441</b>	<b>523,589</b>	<b>545,167</b>	<b>477,695</b>	<b>468,413</b>
<b>Excess (deficiency) of revenue over expenses before other items</b>	<b>8,328</b>	<b>(47,385)</b>	<b>(17,413)</b>	<b>(87,150)</b>	<b>6,270</b>	<b>(24,845)</b>
<b>Other items</b>						
Unrealized gain on investments	64,552	31,426	65,579	31,922	53,451	19,932
Realized gain (loss) on disposal of investments	119,663	(10,676)	91,988	(13,461)	71,993	(8,753)
<b>Excess (deficiency) of revenue over expenses</b>	<b>192,543</b>	<b>(26,635)</b>	<b>140,154</b>	<b>(68,689)</b>	<b>131,714</b>	<b>(13,666)</b>
Net assets - beginning of year	<b>1,037,384</b>	<b>1,064,019</b>	<b>1,575,872</b>	<b>1,644,561</b>	<b>1,131,341</b>	<b>1,145,007</b>
<b>Net assets - end of year</b>	<b>\$ 1,229,927</b>	<b>\$ 1,037,384</b>	<b>\$ 1,716,026</b>	<b>\$ 1,575,872</b>	<b>\$ 1,263,055</b>	<b>\$ 1,131,341</b>

# FINANCIAL STATEMENTS

**The Burns Memorial Fund**  
Summarized Statement of Financial Position  
As at December 31, 2021

	Children		Fire		Police	
	2021	2020	2021	2020	2021	2020
<b>Assets</b>						
<b>Current</b>						
Cash	\$ 106,066	\$ 151,696	\$ 35,380	\$ 96,743	\$ 7,090	\$ 11,085
Due from Fire Fund	-	219,000	-	-	-	-
Due from Police Fund	-	80,000	-	-	-	-
Interest receivable	2,848	3,018	4,181	4,468	3,177	3,355
Goods and service tax recoverable	2,350	1,177	-	-	-	-
Prepaid expenses	946	1,892	946	892	946	892
	<u>112,210</u>	<u>456,783</u>	<u>40,507</u>	<u>102,103</u>	<u>11,213</u>	<u>15,332</u>
Investments	2,062,884	1,701,257	1,772,703	1,774,811	1,403,689	1,319,552
Property and equipment	<u>1,389</u>	<u>1,474</u>	<u>1,389</u>	<u>1,471</u>	<u>1,389</u>	<u>1,471</u>
	<u>\$ 2,176,483</u>	<u>\$ 2,159,514</u>	<u>\$ 1,814,599</u>	<u>\$ 1,878,385</u>	<u>\$ 1,416,291</u>	<u>\$ 1,336,355</u>
<b>Liabilities and Net Assets</b>						
<b>Current liabilities</b>						
Due to Children Fund	\$ -	\$ -	\$ -	\$ 219,000	\$ -	\$ 80,000
Accounts payable and accrued liabilities	12,637	11,978	10,965	10,811	10,966	10,809
Grants payable	<u>901,976</u>	<u>1,086,445</u>	<u>87,608</u>	<u>72,702</u>	<u>142,270</u>	<u>114,205</u>
	<u>914,613</u>	<u>1,098,423</u>	<u>98,573</u>	<u>302,513</u>	<u>153,236</u>	<u>205,014</u>
Deferred contributions	<u>31,943</u>	<u>23,707</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
	<u>946,556</u>	<u>1,122,130</u>	<u>98,573</u>	<u>302,513</u>	<u>153,236</u>	<u>205,014</u>
<b>Net Assets</b>						
Operating reserve	\$ 481,299	\$ 481,299	\$ 896,011	\$ 896,011	\$ 622,690	\$ 622,690
Opportunity reserve	747,239	554,611	818,626	678,390	638,976	507,180
Invested in property and equipment	<u>1,389</u>	<u>1,474</u>	<u>1,389</u>	<u>1,471</u>	<u>1,389</u>	<u>1,471</u>
	<u>1,229,927</u>	<u>1,037,384</u>	<u>1,716,026</u>	<u>1,575,872</u>	<u>1,263,055</u>	<u>1,131,341</u>
	<u>\$ 2,176,483</u>	<u>\$ 2,159,514</u>	<u>\$ 1,814,599</u>	<u>\$ 1,878,385</u>	<u>\$ 1,416,291</u>	<u>\$ 1,336,355</u>

# Thank you for your continued support!



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