



**Burns**  
**Memorial Fund**

*A legacy for Calgary's children*

# Annual Report

# 2022



## ABOUT US

Burns Memorial Fund is the gift of Senator Patrick Burns—a successful rancher, businessman 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.**



## A MESSAGE FROM THE EXECUTIVE DIRECTOR

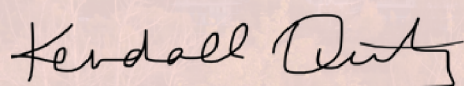
At Burns Memorial Fund, we've long recognized that to most effectively achieve our mandate, we must work in partnership. Over the course of 2022, we have been extremely fortunate to work with dedicated, caring and highly effective community partners who are committed to supporting Calgary's children and youth.

In our High School Bursary Program, high school counsellors and success coaches introduced us to students who were at risk of not graduating due to financial barriers. Our Families Moving Forward partner agencies identified families who were struggling to meet their children's health, education and recreation needs, and helped them find their way to us.

We continued to partner with referring dentists in our Oral Health program to ensure that low-income children received necessary oral health treatment, and we entered into a new partnership with the Alberta Dental Foundation to ensure children receive emergency dental care.

In addition to all this, we continued to work collaboratively with other funders and non-profits from across the city on strategies to improve outcomes for vulnerable children and youth in the areas of youth employment, natural supports, and early literacy.

We could not have achieved what we have in 2022 without the help of our many partners and supporters. On behalf of all of us at Burns Memorial Fund, Thank you, for helping us build a strong community for our children and youth.



**Kendall Quantz,**  
*Executive Director*  
Burns Memorial Fund

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

Senator Patrick Burns was well-known for his commitment to community and helping others, especially during difficult economic times. Thanks to his legacy, we were able to support the families, youth and children who turned to Burns Memorial Fund for help in 2022.

Our charitable foundation, the Children's Fund, ensured that vulnerable young people received the essential supports they needed to lead healthy and fulfilling lives. We did this by providing financial assistance to youth and their families, offering grants to charities working with low-income children and youth, and participating in collaborative initiatives focused on the systemic issues that negatively impact Calgary's young people. In the Police Fund and Fire Fund, we honoured the Senator's respect for police officers and firefighters by awarding post-secondary scholarships and special needs grants to their children.

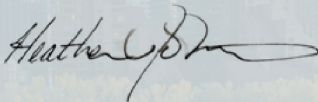
Senator Burns' readiness to help others when times were tough and his commitment to generations of Calgarians inspire all of us at Burns Memorial Fund. We are honoured to steward his legacy and carry on his work.



**Steve Dongworth,**

Fire Chief

*Chair, Burns Memorial Fund and Burns Fire Fund*

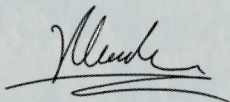


**Heather Johnson**

Director – Recreation & Social Programs

City of Calgary

*Chair, Burns Children's Fund*



**Mark Neufeld,**

Police Chief

*Chair, Burns Police Fund*





# 33

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

**11 charities**, working with almost

# 1,600

**children and youth**, received Community Grants.



# 91

**students, at risk of dropping out of grade 12** for financial reasons, received monthly living allowances

**9 students** in financial need were awarded post-secondary scholarships.

**10 bursaries** helped youth transition into further education, training and employment.



**9 community agencies** partnered with us in Families Moving Forward to meet the health, education and recreation needs of

**184**

**low-income children and youth.**



**111**

**scholarships and 3 special needs grants** were awarded to the children of firefighters.

**200**

**scholarships and 12 special needs grants** were provided to the children of police officers.





## SUPPORTING STUDENTS IN ACHIEVING THEIR GOALS

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 necessary 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.

Completing high school has always been an important goal for Tom. He worked hard in his classes, maintained good grades, and his attendance record was a testament to his commitment to his education. Tom was on track to graduate in 2020 when his family experienced a crisis that left them homeless and needing to seek refuge at a shelter for an extended period. To help support his mom and younger siblings, Tom sought full-time employment in the hopes of improving his family's situation.

Tom's dedication to helping his family caused an interruption in his education and he was unable to complete the requirements to graduate in 2020. Despite this setback, Tom never lost sight of the goal to complete his high school education. Two years later, at the age of 19, Tom re-enrolled in school full-time in the hopes of finishing high school. However, he found it difficult to be successful in his courses while both attending classes full-time and continuing to work. It was at this point that Tom was referred to the HSB program. The HSB program provided Tom with a monthly living allowance that allowed him to concentrate on his education, while still being able to contribute to his family's monthly expenses such as rent, utilities, and groceries.

Throughout Tom's time in the HSB program, he was incredibly devoted to his education and successfully achieved his high school diploma. Tom now looks forward to pursuing his post-secondary education, and with his drive and dedication, there is no doubt he will achieve his goals.



## INCREASING ACCESS TO OPPORTUNITIES & SUPPORT

The **Families Moving Forward Program** (FMF) provides three years of grant funding to families living in low-income situations to meet their children's health, education and recreation needs. Families are referred by partner community agencies.

Maria is a single parent to two children. She was working two part-time jobs to make ends meet when she was referred to the FMF Program in 2022. Maria wanted her children to visit new places and enjoy fun activities, but her income was only enough to cover their basic needs.

Maria's children love going to school. Her daughter, however, has learning challenges that made schoolwork difficult. The financial assistance from the program assisted with the cost of a psycho-educational assessment so her daughter could access the learning supports that she needed.

The program also gave Maria the means to provide her children with recreational experiences. With FMF funding, the children were able to participate in a summer camp where they explored nature and the outdoors, and they took swimming and dance lessons. The program also allowed the family to participate in activities together, including bowling, roller-skating, and attending a circus and theater events in the community. Maria had this to say about the program:

***"I want to thank you so very much for this incredible opportunity you have given my children, and me to be honest. It has taken the pressure off about worrying about the cost of things, in this expensive world. I feel truly blessed to be chosen. As a family we have been able to afford some amazing experiences and that means more than anything. In these past 2 years my kids have had the time of their lives enjoying things they wouldn't normally get the opportunity to experience. Words can't describe how grateful I am!"***





## STAFF



From left:

- **Hanna Moraru**, *Grants Administrator*
- **Tre Ostroski**, *Grants Manager*
- **Kendall Quantz**, *Executive Director*
- **Faye San Jose**, *Grants Coordinator*

**Retired in 2022:** We thank Michelle Clarke for her exceptional leadership over the last 14 years. Her vision and collaborative spirit ushered in a new era for our organization and her impact will be felt for years to come.

## 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*



**Heather Johnson**  
*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*

As of December 31, 2022

## 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**

- Big Brothers Big Sisters of Calgary and Area
- Brenda Strafford Foundation: Heart Home Network
- Closer to Home Community Services
- Discovery House Family Violence Prevention Society
- Easter Seals Alberta
- Immigrant Services Calgary
- Miskanawah
- Meals on Wheels
- Mount Royal University
- Parks Foundation Calgary/Jack James High School
- YW Calgary

### **Funding Partners and Donors**

- Alberta Dental Foundation
- ATCO EPIC
- Calgary Foundation
- Calgary Neighbourhoods, City of Calgary
- Chris Good
- Donations made in memory of Rob Yeats
- Integro Legacy Fund
- Frontstream
- JPMorgan Chase 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



Tel: 403-266-5608  
Fax: 403-233-7833  
www.bdo.ca

BDO Canada LLP  
903 - 8th Avenue SW, Suite 620  
Calgary AB T2P 0P7 Canada

---

## INDEPENDENT AUDITOR'S REPORT

---

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, 2022 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, 2022:

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 organizations. 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*.

Chartered Professional Accountants

Calgary, Alberta

March 10, 2023

BDO Canada LLP, a Canadian limited liability partnership, is a member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.

# FINANCIAL STATEMENTS

## The Burns Memorial Fund

Summarized Statement of Operations and Changes in Net Assets  
For the year ended December 31

	Children		Fire		Police	
	2022	2021	2022	2021	2022	2021
<b>Revenue</b>						
Income from Burns						
Memorial Trust	\$410,999	\$405,137	\$410,999	\$405,137	\$410,999	\$405,137
Donations and grants	205,761	197,894	-	-	-	-
Investment and other income	68,970	118,034	60,938	101,039	47,899	78,828
Cost recovery (partnership)	35,000	35,000	-	-	-	-
	<b>720,730</b>	<b>756,065</b>	<b>471,937</b>	<b>506,176</b>	<b>458,898</b>	<b>483,965</b>
<b>Expenses</b>						
Grants	447,277	525,247	230,740	308,893	206,128	263,587
Program and facility costs	185,904	176,387	176,619	168,967	176,619	168,970
Professional fee	27,278	44,886	27,019	44,063	26,458	43,476
Taxes	-	-	22,500	-	16,500	-
Amortization	1,394	1,217	1,392	1,213	1,391	1,214
Interest and bank charges	-	-	462	453	463	448
	<b>661,853</b>	<b>747,737</b>	<b>458,732</b>	<b>523,589</b>	<b>427,559</b>	<b>477,695</b>
<b>Excess (deficiency) of revenue over expenses before other items</b>	<b>58,877</b>	<b>8,328</b>	<b>13,205</b>	<b>(17,413)</b>	<b>31,339</b>	<b>6,270</b>
<b>Other items</b>						
Unrealized gain (loss) on investments	(236,101)	64,552	(207,996)	65,579	(161,075)	53,451
Realized gain (loss) on disposal of investments	(6,229)	119,663	9,582	91,988	4,864	71,993
<b>Excess (deficiency) of revenue over expenses</b>	<b>(183,453)</b>	<b>192,543</b>	<b>(185,209)</b>	<b>140,154</b>	<b>(124,872)</b>	<b>131,714</b>
Net assets - beginning of year	<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>
<b>Net assets - end of year</b>	<b>\$ 1,046,474</b>	<b>\$ 1,229,927</b>	<b>\$ 1,530,817</b>	<b>\$ 1,716,026</b>	<b>\$ 1,138,183</b>	<b>\$ 1,263,055</b>



# FINANCIAL STATEMENTS

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

	Children		Fire		Police	
	2022	2021	2022	2021	2022	2021
<b>Assets</b>						
Current						
Cash and cash equivalents	\$ 226,014	\$ 106,066	\$ 165,460	\$ 35,380	\$ 140,128	\$ 7,090
Interest receivable	3,000	2,848	4,337	4,181	3,299	3,177
Goods and service tax recoverable	1,483	2,350	-	-	-	-
Prepaid expenses	1,170	946	1,171	946	1,171	946
	<u>231,667</u>	<u>112,210</u>	<u>170,968</u>	<u>40,507</u>	<u>144,598</u>	<u>11,213</u>
Investments	1,706,620	2,062,884	1,458,754	1,772,703	1,145,125	1,403,689
Property and equipment	<u>1,144</u>	<u>1,389</u>	<u>1,144</u>	<u>1,389</u>	<u>1,143</u>	<u>1,389</u>
	<u>\$ 1,939,431</u>	<u>\$ 2,176,483</u>	<u>\$ 1,630,866</u>	<u>\$ 1,814,599</u>	<u>\$ 1,290,866</u>	<u>\$ 1,416,291</u>
<b>Liabilities and Net Assets</b>						
Current liabilities						
Accounts payable and accrued liabilities	11,225	12,637	11,049	10,965	11,048	10,966
Taxes payable	-	-	22,500	-	16,500	-
Grants payable	<u>861,227</u>	<u>901,976</u>	<u>66,500</u>	<u>87,608</u>	<u>125,135</u>	<u>142,270</u>
	<u>872,452</u>	<u>914,613</u>	<u>100,049</u>	<u>98,573</u>	<u>152,683</u>	<u>153,236</u>
Deferred contributions	<u>20,505</u>	<u>31,943</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
	<u>892,957</u>	<u>946,556</u>	<u>100,049</u>	<u>98,573</u>	<u>152,683</u>	<u>153,236</u>
<b>Net Assets</b>						
Operating reserve	\$ 481,299	\$ 481,299	\$ 896,011	\$ 896,011	\$ 622,690	\$ 622,690
Opportunity reserve	564,031	747,239	633,662	818,626	514,350	638,976
Invested in property and equipment	1,144	1,389	1,144	1,389	1,143	1,389
	<u>1,046,474</u>	<u>1,229,927</u>	<u>1,530,817</u>	<u>1,716,026</u>	<u>1,138,183</u>	<u>1,263,055</u>
	<u>\$ 1,939,431</u>	<u>\$ 2,176,483</u>	<u>\$ 1,630,866</u>	<u>\$ 1,814,599</u>	<u>\$ 1,290,866</u>	<u>\$ 1,416,291</u>

# Thank you for your continued support!



Burns Memorial Fund  
1120 - 105 12 Ave SE  
Calgary, AB T2G 1A1

T: (403) 234-9396  
E: [info@burnsfund.com](mailto:info@burnsfund.com)  
[www.burnsfund.com](http://www.burnsfund.com)



[@BurnsFund](https://twitter.com/BurnsFund)



[/BurnsFund](https://facebook.com/BurnsFund)



[@BurnsFund](https://instagram.com/BurnsFund)

