

## Learning Centre Program

The Learning Centre Program experienced another very successful year. At June 30, 2012 there were sixty three volunteer tutors delivering remedial tutoring to seventy nine children in six Centres across Canada. The number of hours of tutoring during the year totaled 3,296. Fourteen children completed the Program.

In addition to the time involved in delivering the tutoring session, each of the tutors also must complete a lesson plan for the session, thereby greatly increasing the number of hours that the volunteer tutors contribute to the operation of the Program. We are extremely grateful to the volunteer tutors for their significant contribution. We are also most grateful to all the other volunteers who supply the administrative services that are most essential for the proper and successful operation of the Centres.

Each of the Centres continues to see a remarkable positive change in the children who receive the remedial tutoring. The change results not only in increased self esteem but also in much improved results in their regular school work. The success of the Program has resulted in an increase in the number of parents who are being referred to the Centres, and these referrals result in an ever growing number

of children awaiting acceptance into the Program.

The Advanced Language Study Course, approved by the Board in April 2011, was conducted during the year. The Centre Directors for London; Windsor; and Halifax along with a number of the senior tutors from those Centres completed the course. The three Centre Directors are now conducting the training of tutors under the supervision of a Certificated Orton-Gillingham Tutor Trainer. It is expected that the three Centre Directors with achieve their Certification as an O-G tutor trainer later this year.

The Moncton Centre commenced operations this past spring. Patricia Martz, the retired Director of the Bangor Maine Centre, is training the tutors and counseling them as they deliver the remedial tutoring. A date for the Official Opening of the Centre has not yet been established.

At the September 2011 meeting of the Foundation Board the Valleys of Calgary and Edmonton were approved to establish a Learning Centre under the Foundation's Learning Centre Program.

Calgary has completed all the planning requirements and has executed the

License Agreement. Thelma Gregan, the Halifax Centre Director, has commenced the training of the volunteer tutors at that Centre. The delivery of remedial tutoring to children will commence later this year. The Official Opening of the Centre will be held on September 16, 2012.

Edmonton is well advanced in their planning. When they achieve "registered charity" status under the Income Tax Act (Canada) they will execute the License Agreement and then commence operations. Paul Barber, the Windsor Centre Director, has agreed to conduct the training of their tutors.

The Valley of Guelph has expressed interest in establishing a Centre. The Foundation President and the Executive Director of the Learning Centre Program met with the Valley leadership group in January. The purpose of the meeting was to provide the group with an outline of the requirements of the Program and an understanding of the financial and manpower obligations they will be undertaking should a Centre be established. An application to establish a Centre has not yet been received.

**Harold E. Crosby**  
*Executive Director Learning Centres*

## Donating to the Foundation

There are a number of ways that you can support the work of the Scottish Rite Charitable Foundation.

Just recently the Foundation has made on-line donations available through the internet. Simply go to the Scottish Rite Charitable Foundation of Canada website [www.srcf.ca](http://www.srcf.ca) and click on "Donating to the Foundation". When you click on "On Line Donations" you will be re-directed to a secure on-line site hosted by CanadaHelps.org (third party donation). We have contracted CanadaHelps to administer our "on-line" donations. CanadaHelps has facilitated over 100 million in charitable donations through their website since it was launched in 2000. It makes it very easy for you and our members to make donations.

**There are also a number of other ways to donate to the Foundation.**

By calling the Scottish Rite Charitable Foundation Office at 905-522-0033 during regular business hours (Monday to Friday, 8:30 a.m. to 4:00 p.m. EST) and have your Visa or Mastercard information ready.

**Estate Planning:** Include the Scottish Rite Charitable Foundation in the planning of your Estate by: including the Foundation in your Will; naming the Foundation as a beneficiary of a new or existing life insurance policy; gifting assets such as stocks, bonds, mutual funds or term deposits; or willing residual funds from a RRIF to the Foundation.

**Memorial Donation:** If you wish to make a donation in the name or memory of someone, you can do so by calling the office at 905-522-0033, or fill out the memorial section of the attached form available on the web, through on-line donations or of a "Blue Envelope".

**Fund Raising:** Participate in fund raising events for the foundation.

Remember, anyone who, over a period not exceeding five years, makes contributions that total at least \$500, is designated a Fellow of the Scottish Rite Charitable Foundation of Canada and is entitled to receive and wear a sterling pin crafted in the shape of the Foundation Logo.



# Annual Report 2011-2012

The Scottish Rite Charitable Foundation of Canada

## President's Report



*Allard B. Loopstra*

Another year in our Scottish Rite Charitable Foundation of Canada history has passed. In 2014, we will be celebrating the Foundation's 50<sup>th</sup> Anniversary. A committee has been appointed to plan special events to commemorate this important milestone. Over the years, your Foundation has donated millions of dollars to support "Solving Puzzles of the Mind" in research grants and Learning Centres for Children. This has been made possible by investing the money in our Capital Fund and disbursing the earnings of those investments on an annual basis. Over the last 48 years, the Capital Fund has grown from \$100,000 to approximately \$15,000,000 today, largely through the generous donations of Scottish Rites throughout Canada.

Since 1964, the Foundation has been governed by a Board of Directors whose responsibility it is to manage, invest, grow, and donate the funds of the Foundation. Not an easy task, especially in the last several years with the ups and downs of the investment markets. Again this past year, as in all the years since its inception, I have been blessed with a team of excellent, talented and passionate Board Members, Committee Chairmen, Foundation Valley Representatives and Supreme Council Office staff. I thank all of you for your contributions to this great cause.

In May 2012, through the efforts and Chairmanship of Ill. Bro. Brian Gilkinson, 33°, we have embarked on a "Penny for Your Thoughts" campaign. This is a great opportunity for all of us to save our pennies that are being phased out of circulation, and contribute them to our Foundation. I truly hope that all Scottish Rite Valleys and members will promote

and support this endeavour over the next couple of years to make this campaign a great success.

With the individual incorporation of the Learning Centres for Children, your Board has decided to establish another recognition pin for donors to those Centres. For several years now, the Foundation has provided a pin in the shape of the Foundation's triangular logo to those who have donated \$500 or more over a five year period. We now have a similar pin in the shape of a bear that Learning Centres can now request to present to individuals who have donated \$500 or more over a five year period to a Learning Centre. Though the shape is the same as the "white bear" pin that is sold to raise money, it is distinctively different and silver coloured.

After three years as your President, it is time to pass the torch to another Ill. Brother. Also, our Executive Director Learning Centres, Ill. Bro. Harold Crosby, 33°, is retiring from his position. At our Board meetings in September in Winnipeg, a new President will be elected

and a new Executive Director will be appointed.

We owe a great amount of thanks and gratitude to Ill. Bro. Crosby. His work and dedication in changing our Learning centre organization and governance has been outstanding. Without his efforts, my job as President would have been impossible. Our heartfelt thanks Harold.

As I reflect on my three years as President, I am proud of what your Board has been able to accomplish. Some of the highlights have been the start-up of the joint publication of the Foundation and Supreme Council – the Clarion, the reorganization and governance of the Learning Centres, the increase from four to six Learning Centres (Barrie and Moncton being the most recent), and stream lining office staff and duties. Thank you to all who made this possible.

For the first time, our Ladies are being invited to our Foundation Luncheon in Winnipeg. The last several years, we have brought in very interesting and inspirational speakers. The Ladies have let it be known that they would like to attend when first rate speakers are engaged. In Winnipeg we will have such a speaker and I trust both women and men will enjoy this Luncheon.

As I sign off as your President, I thank you for the confidence and support you have given me and my Board of Directors over the last three years. It truly has been a privilege to work on your behalf for a great cause and to make a difference. Please continue to support your Foundation by your donations.

**Allard B. Loopstra**  
*President*  
*Scottish Rite Charitable Foundation*

## Treasurer's Report

During the 2012 financial year, the Foundation continued to transfer funds and assets to the incorporated Learning Centres. In total, donations of \$1.5 million were paid and \$192,000 of capital assets were transferred in 2011 and 2012. The Foundation will make additional donations to Learning Centres in 2012-2013 as they become operational.

The market value of the investment portfolio at May 31, 2012 was \$14.8 million. The Foundation expects to earn approximately \$650,000 on the investments for the year ending May 31, 2013. Worldwide economic events continue to constrain the returns on the portfolio. The unrealized gains and losses are recorded at year end in accordance with accounting standards. While these non-cash changes in the portfolio's value are important to consider, they are not predictable, and do not dictate how the Foundation's programs will be funded. A very long-term investment perspective is necessary.

The Foundation continues to look for ways to reduce operating expenses so that more money will be available for the important programs that are funded. Approximately \$390,000 for research grants will be made in 2012-2013.

Members continue to be generous in supporting the Foundation and the Learning Centres. In addition to annual donations and

### Statement of Operations

Year ended May 31	2012	2011
<b>Revenue</b>	<b>\$</b>	<b>\$</b>
Donations - Learning Centre operations		65,359
Investment income	558,251	560,398
Gain on disposal of investments	192,055	43,388
	<u>750,306</u>	<u>669,145</u>
<b>Expenses</b>		
Administration,	72,408	113,389
Directors' expenses	13,216	6,445
Insurance	7,872	11,239
National Learning Centre expenses	21,788	31,409
Professional fees	29,359	9,058
Promotion & public relations	11,154	20,854
	<u>155,797</u>	<u>192,394</u>
Surplus	594,509	476,751
<b>Distributions</b>		
Grants	407,672	368,386
Awards	6,000	30,000
Bursaries	3,750	11,500
Learning Centre grants	45,000	240,000
Interest on amounts due to Learning Centres		77,560
Learning Centre operations		102,603
Learning Centre depreciation		41,221
	<u>462,422</u>	<u>871,270</u>
Surplus/ (deficit)	132,087	-394,519
Change in unrealized gain/(loss) on investments	-760,697	541,952
Excess/ (deficit)	<u>-628,610</u>	<u>147,433</u>

fund-raising activities, bequests from members and their families remain a very important source of funding for the Foundation. Please consider including the Foundation as a beneficiary in your will.

**Duncan S. Skinner**  
Treasurer

### Statement of Financial Position

Year ended May 31	2012	2011
<b>Assets</b>	<b>\$</b>	<b>\$</b>
Cash	145,298	94,274
Receivables	15,648	9,134
HST/GST receivable	31,109	30,160
	<u>192,055</u>	<u>133,568</u>
Capital assets		116,458
Investments	14,837,462	16,031,514
	<u>15,029,517</u>	<u>16,281,540</u>
<b>Liabilities</b>		
Payables and accruals	64,855	33,888
Due to Learning Centres	45,000	418,439
	<u>109,855</u>	<u>452,327</u>
<b>Net assets</b>		
Unrestricted net assets		19,539
Net assets invested in capital assets		116,458
Internally restricted net assets - capital	14,919,662	15,693,216
	<u>14,919,662</u>	<u>15,829,213</u>
	<u>15,029,517</u>	<u>16,281,540</u>

### Statement of Capital Revenue & Capital

Year ended May 31	2012	2011
<b>Capital revenue</b>	<b>\$</b>	<b>\$</b>
Donations		
Individuals Lodges and Masonic organizations	90,080	105,188
Learning Centre donations - capital	31,526	106,038
Bequests	244,575	618,080
	<u>366,181</u>	<u>829,306</u>
Internally restricted net assets - capital		
beginning of year	15,693,216	14,915,369
Capital revenue	366,181	829,306
Transfer to unrestricted net assets	-1,139,735	
Funds transferred to Learning Centres		-51,459
	<u>14,919,662</u>	<u>15,693,216</u>

### Changes in Unrestricted Net Assets

Year ended May 31	2012	2011
	<b>\$</b>	<b>\$</b>
Unrestricted net assets, beginning of year	19,539	456,206
Excess (deficit) of revenues over expenses	-628,610	147,433
Invested in capital assets		-96,061
Transfer from internally restricted net assets	1,139,735	
Funds transferred to Learning Centres	-530,664	-488,039
Unrestricted net assets, end of year	<u>Nil</u>	<u>19,539</u>

## Recognizing Donors

The Scottish Rite Charitable Foundation is heavily reliant on our members, families and corporate donors to carry on our very worthwhile work. Over the last number of years, it has become a tradition to honour our donors through three special awards which are presented at the SRCF Luncheon.

This year we are including, where Valleys have submitted information, donations that were received directly to assist in the development and operation of Learning Centres for Dyslexic Children.

**The Highest Average Donation Award** is calculated by dividing the total donated in a Valley by the number of members. Once again, for the fifth consecutive year, the Valley of Halifax, with an average donation of \$458.20 is the overall winner. Meritorious runners-up are Moncton Valley (\$267.01) and Windsor Valley (\$84.48)

**The Highest Participation Award** recognizes the highest number of members who donate during the year as a percentage of total membership. For the second consecutive year, St. John's Valley tops this category with an amazing participation rate of 45.24%. Honourable mention goes to Windsor Valley (27.61%) and Winnipeg Valley (21.18%)

Putting this into some perspective, several years ago the SRCF set a national participation target of 10%. During the last several years there has been a noticeable increase in participation rates....5.3% in 2010, 8.7% in 2011 and 8.5% this year. Indeed, thirteen Valleys have exceeded the desired national participation rate.

The third award is the **Largest Year-over-Year Increase Award** which goes to the Valley of Moncton with an increase of \$50,346.50. Significant increases were also recorded by Halifax Valley (+\$41,952.00) and Barrie Valley (+\$20,051.49).

The recipients of these Awards largely tend to be Valleys which have endorsed the development of a Learning Centre and have mobilized their fund-raising capacity to an extremely high level.

While these Awards recognize donor excellence and achievement, the Foundation heartily congratulates all Valleys and their donors for their energy and effort in supporting research into solving puzzles of the mind and the development of Learning Centres. You are making a huge difference...and we thank you for your generosity.

**Dr. Samuel Kalinowsky,**  
Chairman, Valley Awards

## Grants & Awards

The Scottish Rite Charitable Foundation of Canada continues to support researchers who are seeking to "Help Solve the Puzzles of the Mind". Success can be seen in new understandings of the diseases, which may lead to new and effective treatments and a better quality of life for those coping with the disease, along with family and caregivers.

The Awards Committee is committed to supporting promising researchers during the early years of their studies. Recipients tell us that it was only through early funding by the Foundation that they were able to conduct their research and develop a personal reputation that attracted funding from other agencies in later years. They credit the Foundation with being the spark plug in starting a successful career.

During the last year, the Awards committee received fourteen new applicants for Major Research Grants (\$35,000 per year for up to three years) and recommended funding four new Research Grants. In addition, the Foundation continues its support of four Major Grant recipients for a second year and four recipients for a third year. Total Major Grants in support of for 2011-2012 was \$407,672.

The Foundation is indebted to Dr. Anurag Tandon from the University of Toronto, who chairs the review panel with the generous assistance from professional colleagues across Canada.

The Deputy's Provincial Charitable Program was revamped this year. A total of eleven Deputy's Provincial Charitable Donations were distributed during the year with a total value of \$11,000.

The SRCF receives many letters of thanks from recipients expressing appreciation for the support received. Scottish Rite members may learn more about the scope and results of the research funded through their donations by reading the brief reports printed in the various SRCF newsletters.

More information about the Grants and Awards Program is available on the Scottish Rite Charitable Foundation website ([www.srcf.ca](http://www.srcf.ca)) including details about the funded research.

Respectfully submitted,  
**Dr. Gareth R. Taylor**  
Chair, Awards Committee

**Dr. Loren Kline**  
Vice-Chair

<b>Dr. Richard Bazinet</b> <b>University of Toronto</b> <i>Protective effects of docosahexaenoic acid in a mouse model of neuroinflammation</i>	<b>\$35,000</b>
<b>Dr. Robert Cumming</b> <b>University of Western Ontario</b> <i>Evaluation of the neuroprotective effects of pyruvate kinase-1 in an Alzheimer's disease mouse model</i>	<b>\$35,000</b>
<b>Dr. Elsa Rossignol</b> <b>Hopital St-Justine</b> <i>Plasticity related learning mechanisms in Fragile X and SYNGAP1 children</i>	<b>\$35,000</b>
<b>Dr. Christina Till</b> <b>York University</b> <i>Structural and functional neuroimaging correlates of cognitive impairment in childhood-onset multiple sclerosis</i>	<b>\$34,997</b>