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**Max Bell Foundation**  
**Annual Report 2013**

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# Max Bell Foundation Annual Report 2013

Since its creation in 1972 by the late Mr. George Maxwell Bell, Max Bell Foundation has made grants across Canada for a wide range of charitable purposes which benefit all Canadians.

In creating the Foundation, Max Bell charged the Board of Directors with managing the funds wisely, setting the Foundation's mission, and determining the fields in which grants would be made. These fields have changed over the years, and have included: media and journalism, physical fitness, sports, oceans and inland waters, the relationships of

Canada and Canadians with countries of the Asia Pacific region, veterinary science, health and health care, education, and stewardship of the environment.

While the particular fields of interest have evolved over the years, the primary purpose of Max Bell Foundation has remained the same. In contributing to Canadians and their communities, the Foundation has always sought to support innovative endeavors which encourage the development of human potential in pursuit of social, educational, and economic goals.

## DIRECTORS

Carolyn Hursh, *Chair*

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Brenda Eaton

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Jim Gray

Dr. Anthony Masi

## STAFF

David K. Elton, PhD *President*  
Allan Northcott *Vice President*  
Ralph Strother, MD *Chief Investment Officer*  
Alida White *Administrator*

In our review process, Max Bell Foundation relies on input from anonymous experts. We thank them sincerely for their outstanding voluntary contributions, which are invaluable to our decision-making.

Max Bell Foundation's Auditors are Ernst & Young LLP, Chartered Accountants, 1000 - 440 2nd Avenue SW, Calgary AB T2P 5E9.

## MESSAGE FROM THE CHAIR AND PRESIDENT

**M**ax Bell's legacy has deep roots across Canada. We are surprised at how often, whether at a meeting or a conference or in some casual conversation, someone tells us about how their life was touched by Max Bell. Inevitably, the stories reflect Max's generosity and integrity. The many aspects of operating the Foundation that bears Max Bell's name are united by a common purpose: to reflect the spirit of the man. It is a privilege to embrace this purpose in partnership with the many creative and committed

Canadians with whom we have worked in the past year.

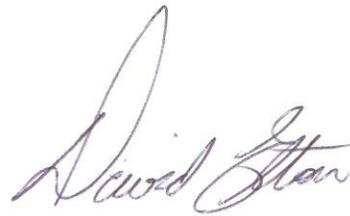
Max Bell Foundation's mission reflects the visionary approach Max himself took to his endeavors. We believe that great opportunity exists to improve Canadian society by approaching issues and concerns at the level of public policy. The scale and scope of many of the most pressing issues of our time require collective action for the public good. The decisions made by those who represent us all must be made under often challenging circumstances, yet

they are decisions that profoundly impact our lives and our collective well being. We believe that bringing innovation and understanding to those decisions is essential to improving the society we enjoy. In 2013, Max Bell Foundation invested more than \$1.44 million in grants to organizations who share this vision.

In 2013, Max Bell Foundation delivered its fifth Public Policy Training Institute (PPTI). The PPTI provides individuals with an opportunity to learn more about how engagement with public policy enhances the ability of the charities they represent to meet the needs of Canadians. Nineteen leaders from Alberta's non-profit sector completed the PPTI between January and June.



Carolyn Hursh  
Chair



David Elton, PhD  
President

## NEW GRANTS

The following new grants were initiated in 2013

### **Alberta Children's Hospital Foundation**

[Supporting Self-Regulation at Age 3 – All Our Babies Study](#)

\$375,000 over 36 months

Self-regulation predicts success at school and in relationships with others. It is exemplified in activities like waiting or taking your turn or following simple instructions. This project will assess how self-regulation can be encouraged before children reach school age. The first stage of the project will examine what elements in early life (until age 3) predict good self-regulation, and how to screen for poor self-regulation. The second phase will inform community stakeholders, policy makers, and healthcare professionals about the research findings.

### **Barth Syndrome Foundation**

*Director's Donation*

\$5,000

### **C.D. Howe Institute**

[Research Commentaries on Healthcare Policy Reform](#)

\$97,750 over 18 months

This project will prepare actionable research for policy makers and stakeholders regarding cost-effective delivery of high quality healthcare. Six articles will be published, tackling issues such as *How to Pay Specialist Physicians* and *Patient Responsibility in the Canadian Health Care System*.

### **Calgary Counselling Centre**

*General support*

\$10,000

This grant helped support the conference *Spotlight on Outcomes* held in October, 2013, in Calgary.

### **Calgary Urban Project Society (CUPS)**

*Prenatal to Three Program Evaluation Project*

\$200,000 over 36 months

This project will measure the outcomes of a pre-natal to three program designed to support vulnerable mothers and families. The demonstration program uses a comprehensive, collaborative, multi-sectorial approach to improving outcomes for those with children from birth to 3 years who are at the greatest risk of failing to reach their full developmental potential. It will offer centre-based early learning and care, home visitation, parenting education, and family support that includes fathers or another significant caregiver of the child.

### **Canada West Foundation**

*Invest in the West*

\$300,000 over 36 months

Canada West Foundation will establish three new public policy research centres focusing on issues affecting western Canada's long-term prosperity: natural resource development; human capital; and trade and investment. Canada West Foundation aspires to have an assertive national voice that effectively translates high-quality research into formats that are usable in solving real world problems.

### **Canadian Institute for Advanced Research (CIFAR)**

*General support*

\$10,000

This grant helped support the symposium *From Cell to Society*, held in honour of Clyde Hertzman in February, 2014, in Toronto.

### **Concordia University – Centre for the Study of Learning and Performance**

[Emerging Literacy in Mathematics](#)

\$300,000 over 36 months

This project involves the development, design and dissemination of mathematics learning software called Emerging Literacy in Mathematics (ELM). ELM, designed for early elementary learning, will focus on teaching number sense,

knowledge of mathematical patterns and relationships, and the beginnings of strategic thinking in order to prepare students for improved understanding of higher mathematics. ELM will improve the numerical proficiency of children, increase the number of students who choose a career in science, technology, engineering and mathematics, and enhance math achievement in Canada more generally.

### **Environmental Law Centre**

*In Water we Trust? Evaluating water trusts for use in Alberta*

\$26,256 over 14 months

Environmental Law Centre will assess the appropriateness of water trusts as a policy mechanism to protect Alberta's water resources. A water trust can protect the flow of a river by purchasing the right to leave a certain amount of water in stream. The Environmental Law Centre will examine their relative merits compared with alternatives, and will prepare a policy framework to guide implementation of potential flow preservation tools.

### **Heart and Stroke Foundation of Alberta**

*Alberta Wellness Foundation Campaign*

\$15,000 over 12 months

The proposed Alberta Wellness Foundation would support community initiatives to increase awareness and education about staying healthy. It would focus on six modifiable risk factors, including physical activity, unhealthy eating, tobacco use, alcohol misuse, adverse childhood experiences, and injury.

### **Imagine Canada**

*General support*

\$10,000

This grant helped support the development of an outreach tool intended to inform Boards of Directors of Canadian charities about the regulatory environment for public policy advocacy.

## **McGill University – Department of Economics**

*A Canadian Green Fiscal Commission*

\$330,900 over 36 months

The Green Fiscal Commission will prepare a series of reports on Ecological Fiscal Reform (EFR). EFR is an approach to taxation that reduces tax on labour and income and shifts it toward pollution and resource waste. The communications efforts will consider important policy issues such as federal-provincial coordination, alternative tax-reform options, and distributional issues among sectors, regions, and individuals. The project aims to encourage improved capital productivity while decreasing pollution, resource waste and consumption.

## **Momentum**

*General support*

\$5,000

Asset Building Learning Exchange (ABLE) is a national conference for all stakeholders interested in fostering financial empowerment for people who live on low incomes. This grant helped support the ABLE conference held in Calgary in November, 2013.

## **Samara**

[Democracy Talks](#)

\$162,000 over 24 months

The *Democracy Talks* is a national public outreach initiative designed to improve political participation among youth and newcomers in Canada. This phase of the project will expand the existing program to a wider network of communities across Canada. Samara will also create an interactive online portal to enable Canadians across the country to learn about political engagement and participate in the forum online.

## ONGOING GRANTS

The Foundation continued the administration of the following ongoing grants through 2013

### **Alberta Eco-Trust Foundation**

*Taking Stock: Improving ENGO Participation in Alberta's Environment Policy Development and Decision Making*

\$12,500 over 18 months

This project will bring together 30 leaders and senior managers from environmental non-profit organizations, industry, government and other sectors to use an innovative combination of systems mapping and scenario building. The goal is to examine how environmental policy decisions are made in the Alberta government and to identify the challenges that the Alberta government currently faces and will face in the future. The project will also aim to identify new or significantly modified systems capable of meeting those challenges, and identify changes that could transform the current system into one that will work successfully in the coming decades. The total budget of this project is \$197,067.

### **Brenda Strafford Chair, University of Calgary**

*Research to Policy to Practice: Engaging policy Makers and the Community in Preventing Domestic Violence*

\$100,000 over 24 months

This 24-month knowledge mobilization project will build support for public policy changes that take a prevention approach to domestic violence in Alberta.

### **Canada West Foundation**

*Bright Light: Promising Practices for Improving Urban Energy Systems*

\$95,000 over 10 months

This 8-month design and communication project will identify and share success stories from seven western Canadian cities that have undertaken demand-side energy strategies. The project sets out to establish the approaches used in cities, where the bulk of energy consumption occurs, to reduce energy demands in western Canada. Its goal is to observe an increase in energy strategy implementation focusing on demand-side energy efficiency and conservation.

### **Canadian Institute for Advanced Research**

*Successful Societies*

\$350,000 over five years

This program will build on earlier research to assess social resilience and the ways communities have faced social problems over the past thirty years. Areas of inquiry may include response to the AIDS crisis and democratic decision making. The project will result in a book that will look at the phenomenon of social resilience, understood broadly as the factors that condition how well societies, communities, and individuals respond to a range of social, economic, and political challenges to improve well-being over time. The total budget for this project is \$1,395,000.

### **Community University Partnership (CUP), University of Alberta**

*Enhancing the Province of Alberta's Implementation of the EDI in Indigenous Contexts*

\$249,900 over three years

This project will engage the five tribes of the Yellowhead Tribal Council to analyze the Early Development Instrument that is being used by the Government of Alberta to map early childhood development across the province. The analysis will be useful for the development and piloting of supplements to the EDI that will help communities, governments, and policy makers identify the types of services, resources, and supports that Indigenous children and their families need to provide the best possible start in life. The total budget of this project is \$713,000.

**Concordia University – Centre for the Study of Learning and Performance**  
*Inquiry Strategies for the Information Society in the Twenty-first Century*

\$300,000 over 36 months

This project involves the development, piloting and dissemination of enhancements to an innovative online educational software tool called *Inquiry Strategies for the Information Society in the Twenty-First Century (ISIS-21)*. This tool promotes critical thinking, self-regulation, reading comprehension, and writing. Over the 36-months of this project, an enhanced version of *ISIS-21* will be ready for implementation and testing in middle schools. Data will be collected on the use of the tool, and assessed to determine how useful and feasible it will be to implement in schools throughout Canada. The total budget of this project is \$550,000.

**Imagine Canada**

*Leadership for a Stronger Canada*

\$37,500 over three years

The aim of this project is to support the development and capacity of the charitable and non-profit sector by increasing effectiveness and transparency in public policy work and creating a new narrative of sector engagement. Imagine Canada is creating an early alert system to inform the sector about meaningful changes in media coverage and public policy developments. It is also developing networks of key groups in order to respond to emerging and ongoing policy issues and launching *Sector Source*, an online repository of capacity building tools for charitable and non-profit organizations. The total budget of this project is \$1,000,000.

**Max Bell Foundation**

*Senior Fellow: Dr. Cy Frank*

\$100,000 over one year

Before becoming the CEO of Alberta Innovates – Health Solutions in 2013, Dr. Cy Frank was a Professor in the Division of Orthopaedics/Department of Surgery, University of Calgary/Alberta Health Services. He has a 30-year history of competitive grant support from provincial and national granting agencies. He was

a Senior Investigator, Alberta Innovates – Health Solutions; the McCaig Professor of Joint Injury and Arthritis Research; Executive Director of the provincial Alberta Bone & Joint Health Institute (ABJHI); and Vice President, Research Strategy, Alberta Health Services. In addition, Dr. Frank is an orthopaedic surgeon who still practices knee surgery in Calgary

Dr. Frank's experience spans surgical, research, and system management functions in health care. Based on this extensive experience, Dr. Frank will author a series of commentaries on the dynamics of change in a large health care system.

### **McGill University**

*Spreading Inpatient Work Redesign to Improve Quality of Care and Work Environments*

\$251,286 over 30 months

This project aims to build on a previous Max Bell Foundation grant made through the Patient Engagement Program in conjunction with the Canadian Health Services Research Foundation. That project was successful in engaging front line staff with patients in an effort to improve patient outcomes and the work environment. This project is designed to build on that experience and test spread strategies to achieve larger organizational impacts in eight additional units, including an adult teaching hospital, pediatric hospital and community hospital. The total budget of this project is \$1,005,142.

### **McGill University - Department of Psychiatry**

*Dissemination of Creative Expression Programs for Multiethnic Schools, Phase 2*

\$202,060 over 24 months

This training program and support project is intended to improve the mental health outcomes of a large number of immigrant and refugee children. This project will introduce into schools creative expression therapies that improve expression of emotions, problem solving and conflict resolution skills through play and art. It will provide teachers with a multimedia training kit in creative expression therapy that includes continuous supervision and support. The resulting outcomes will be measured and used to inform policy makers about best practices for integrating immigrant and refugee children. The total budget of this project is \$307,144.

### **McGill University - Faculty of Agriculture and Environmental Sciences**

*A Water Quality Assessment Framework for a Safe Food System*

\$346,500 over 36 months

The purpose of this project is to develop a system for monitoring irrigation water in the Canadian Food Safety System. In order to ensure that microbial contamination does not undermine the health of Canada's food supply, policies must be implemented to actively prevent contamination in the field and to meet market expectations in terms of food safety. The total budget of this project is \$643,500.

### **McGill University - Faculty of Education**

*Schools were all Children Learn to Read*

\$200,000 over 24 months

This research and demonstration project will generate data concerning the Response to Intervention (RtI) approach to literacy instruction that then will be used to mobilize knowledge to inform public policy. The RtI approach measures literacy learning beginning in the early elementary school years. It favours frequent and early testing because evidence suggests that early identification and intervention is more likely to affect positive learning outcomes later on. The total budget of this project is \$377,095.

### **McGill University - Gault Nature Reserve**

*Integrating Bio-Indicators of Stream Water Quality into regional planning for Peri-urban Landscapes*

\$209,000 over 36 months

Researchers from McGill University are using IBGN, a protocol using bio-indicators of ecosystem health, in the Gault Nature Reserve to demonstrate how the IBGN standard is applicable to the management of water stream quality. Bio-indicators of water quality are potentially more easily understood by the general public than standard chemical measures of water quality. By increasing public understanding and engaging a participatory process for increased awareness of IBGN as a bio-indicator, public acceptance of its value may encourage the ultimate

incorporation of IBGN into regulatory policy. The total budget of this project is \$390,500.

### **McGill University - Lady Davis institute for medical research at the Jewish General Hospital**

*Caring for the Caregiver: A Service for Family Caregivers of Cancer Patients*  
\$179,900 over 36 months

This three-year volunteer training, development, and pilot testing project is intended to help volunteers address the unmet needs of family caregivers who are caring for family members at the end of life. The intent of the training and subsequent service program is to reduce the burden on family caregivers, thereby improving their quality of life and health. The total budget of this project is \$215,120.

### **McGill University - School of Communication**

*A Service Delivery model to better Support Young Adults with Autism Spectrum Disorders in the Transition from School to Community*  
\$154,300 over 36 months

This project aims to produce a feasible model that policy makers can use to establish transition and social inclusion programs for people with Autism Spectrum Disorder (ASD). People living with ASD require key supports with skill instruction, real-life social communication, self-determination and problem solving in order to transition from school to community living. The total budget of this project is \$154,300.

### **University of Toronto**

*Evaluating Patient Engagement Projects*  
\$50,000 over 12 months

This project will use a continuum of patient and client involvement frameworks to evaluate the outcomes of the several Patient Engagement Program projects being supported by CHRFSF. The total budget for this project is \$125,000.

## **University of Calgary - Faculty of Nursing**

### *Policy-Relevant Evaluation of Calgary Urban Project Society Intervention Programming*

\$141,738 over 48 months

The goal of the study is to identify costs and the key elements of CUPS programming that improve and sustain positive health and developmental outcomes for children and their families over the short and long term. A secondary goal is to provide valid evidence to support decision-making about the most effective policies and programs for vulnerable children and their families. The study will test the short- and longer-term effects of an innovative, community-based multiple intervention program. The total budget for this project is \$195,000.

## **Sustainable Prosperity**

### *The Green Economy: A transformational Policy Change*

\$225,000 over 18 months

The purpose of this project is to demonstrate that environmental progress need not come at an economic cost. A Sustainable Prosperity Framework for Canada will accelerate progress on specific policy reforms across a range of environment-economy issues. This project will result in a framework outlining not only carbon and climate change recommendations, but other natural capital management strategies ranging from wood to mineral use strategies and technological innovations aimed at reducing pollution and waste. The total budget for this project is \$344,000.

## **Pemsel Case Foundation**

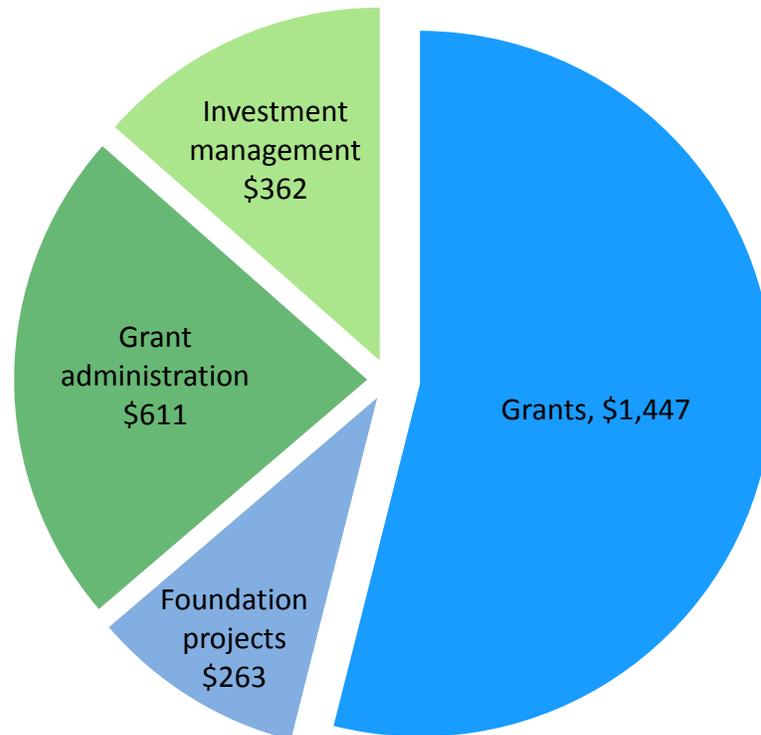
### *Advocacy, Political Activities, and Canadian Charities*

\$10,000 over 12 months

Limited legal research has been undertaken to explain the boundaries and limitations on non-profit and charitable groups' engagement in policy making. This project will undertake substantive legal research and provide non-profit groups with the information needed to legally and confidently engage in political advocacy. The total budget of this project is \$25,000.

## FINANCIAL REPORT

In 2013, Max Bell Foundation made disbursements for grants totaling \$1.45 million, and charitable projects of \$263 thousand (combined these account for 64% of the annual total expenditure of \$2.683 million).

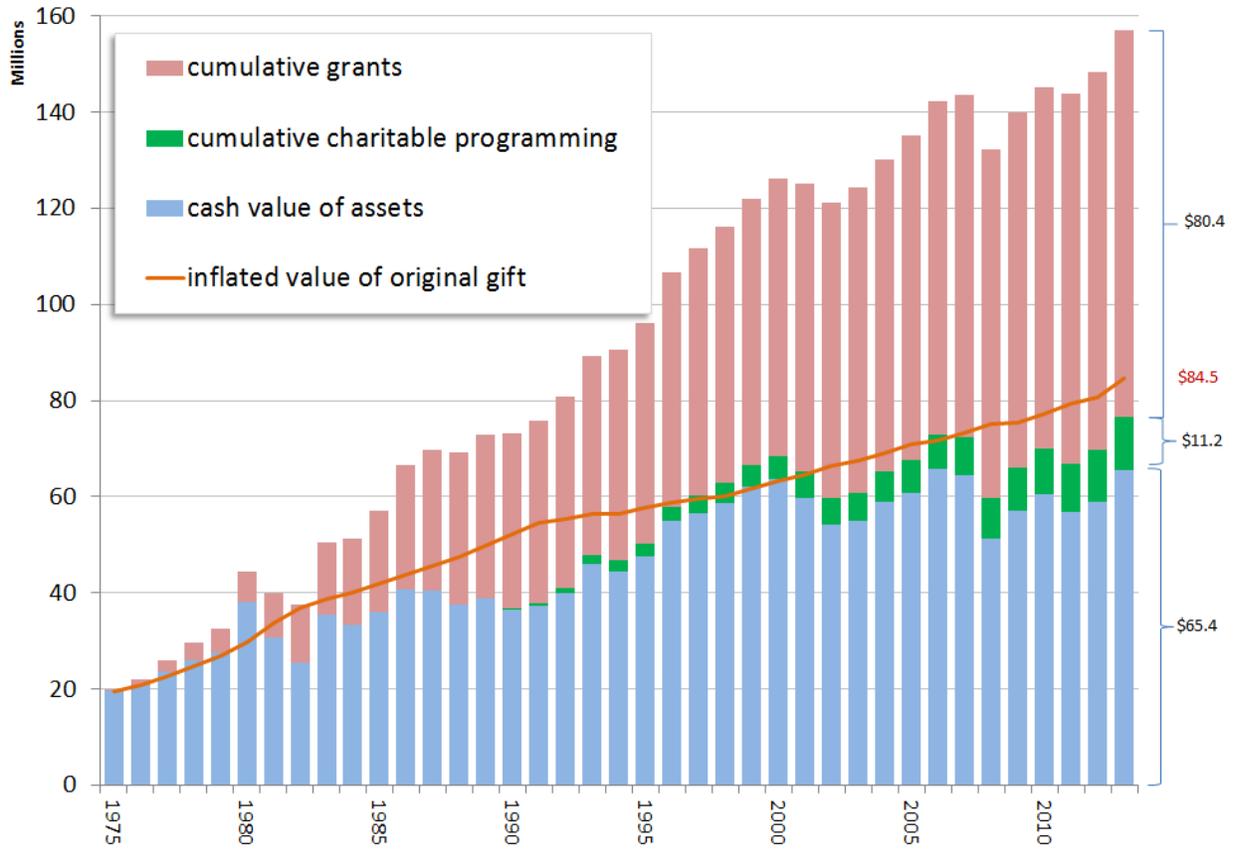


### 2013 Expenditures (000s)

During calendar 2013, the Foundation's investments funded the disbursement categories above and, in addition, the asset base grew from \$59 MM to \$65.4 MM. Had the growth of the Foundation's asset base kept pace with inflation since 1974, it would be valued at \$84.5 MM at the end of 2013.

Since the Foundation's inception, it has invested \$80.4 MM in grants to improve Canadian society, and has invested \$11.2 MM in identifying, helping develop, and administering those grants as well as directly delivering charitable programs.

## Max Bell Foundation Invested in the Community 1975 - December 2013



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