



Dr. Stirling McDowell Foundation for Research Into Teaching Inc.

# Annual Report

2019-20



## **Cover Photo**

Courtesy of Michael Radford

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# Introduction

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Since 1991 when it was formed, the McDowell Foundation has supported an amazing legacy of teacher-led research with real, immediate, and lasting educational effects funding more than 300 projects. Think about the number of students, teachers, and families who have been affected by and benefited from this work – thousands!

Whether through the financial and in-kind support of the Saskatchewan Teachers' Federation, the ongoing donations of individuals or groups of teachers including superannuates and their local chapters and local associations, or the infectious enthusiasm of our grant recipients in schools across the province, the Foundation's heart and soul is the teaching profession! As we look towards the future, the need for quality research within a local context is as great as ever, and we look forward to continuing to support teachers and other educators as they strive for new and innovative ways to support students and teachers in the province.

This past year research teams were supported by staff of the McDowell Foundation and the Saskatchewan Teachers' Federation from the moment of grant approval through to final report writing. Feature articles were posted online and appeared in the Saskatchewan Bulletin, and videos showing the impact of research project processes and outcomes on students and teachers were featured on Facebook and Twitter. The Foundation also published a bi-annual newsletter – McDowell Foundation News that is published spring and fall. We continued to support the McDowell Salon Series. The Salon Series is designed to provide research teams with an additional way to disseminate their research. The salons or round-table discussions take place in communities across Saskatchewan and offer research teams the opportunity to collaborate with other local stakeholders to both share their research findings and explore next steps or implementation strategies. This year discussion was held in partnership with the Saskatchewan Mathematics Teachers' Society and focused on reconciliation in mathematics.

Like many organizations, COVID-19 had a significant impact on our operations. The second Salon Series scheduled for May 2020 was postponed, and the Foundation shifted to supporting teachers and students as they adjusted to the new realities in education. The 2020 Directed Call for Research applications addressing the impact of COVID-19 on the K-12 public education is intended to support teachers and students as they explore the new learning environments together. The Foundation will also continue with our regular call for research applications for 2021-2022 later in the fall.

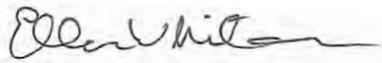
We are also honoured to be named as a Patron of the Lieutenant Governor, His Honour, the Honourable Russ Mirasty. His Honour has identified reconciliation and education as one of his five-year goals and has chosen the McDowell Foundation as one of the organizations to which he will offer his support.

We thank each and every one of our donors for making this work possible! You are contributing to the professional growth of the participating teachers and the advancement of teaching and learning practices in schools across our province. Also we are deeply grateful to the members of the Project Review Committee for generously contributing their time and expertise, as well as the unwavering support from the provincial Executive and staff of the Saskatchewan Teachers' Federation.

To the members of the Board of Directors who have served our profession over the past year, we thank you for your leadership and commitment to strengthening the McDowell Foundation and its connections with teachers, students, and communities in order to improve outcomes for all learners.



Sean Lockwood  
President



Ellen Whiteman  
Manager

# Overview of the Organization

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The McDowell Foundation is an independent charitable organization that was established by the Saskatchewan Teachers' Federation in 1991. The Foundation continues to work in close partnership with the Federation and receives both financial and in-kind assistance from the Federation on an ongoing basis.

Its general purpose is to support research, inquiry, and the dissemination of information that focuses on teaching and learning within the publicly funded PreK-12 education system. In all its projects and activities, the Foundation is guided by the voice of practising teachers and works in consultation with organizational partners. It exists to fund, support, disseminate, celebrate, and promote educational research.

The McDowell Foundation calls for research proposals on an annual basis and selects research projects for funding according to established budgets, policies, and criteria. At times it has facilitated research on current and timely educational topics in partnership with other educational organizations. On occasion it has worked with donors who have requested that their charitable contributions be used to promote and support research in a particular area of educational interest. The Foundation may also commission research in an area of need and share the findings with teachers, researchers, and educational decision makers.

The mandate of the McDowell Foundation includes providing teachers and other educators with opportunities to learn about educational research, encouraging researchers to come together as an educational research community, and helping researchers to share their research with each other and the general public. Each year the Foundation sponsors the Learning From Practice Exchange of Teacher Knowledge and Research conference to showcase recently completed McDowell Foundation projects, and the Foundation has introduced the Salon Series to encourage conversations in local communities.

The results of all research projects funded by the McDowell Foundation are published and can be accessed through the Foundation's website, [www.mcdowellfoundation.ca](http://www.mcdowellfoundation.ca) or through the Emma Stewart Resources Centre at [www.stf.sk.ca/professional-resources/emma-stewart-resources-centre](http://www.stf.sk.ca/professional-resources/emma-stewart-resources-centre). To date the results of approximately 200 projects are available. These projects provide information on the following various areas of study: early years education, fine arts and education, inclusive education and English as an additional language, Indigenous education, language immersion, literacy and language arts, mathematics and science, physical education and health, social justice and equity, teaching and learning, and technology and education.

McDowell Foundation research is funded through donations from individuals and corporations and is conducted primarily by practising teachers who undertake research projects as part of their professional practice. The Foundation works to communicate with donors, researchers, educational partners, and the public about the work of the Foundation and the opportunities it offers for the improvement of education. Key partners in developing an appreciation of the Foundation's mission to develop teacher-led research have been the Saskatchewan Teachers' Federation, local teachers' associations, superannuate chapters, colleges of education, professional growth networks, educational administrators, and the organizational partners involved in PreK-12 education in Saskatchewan.

The McDowell Foundation is governed by a Board of Directors appointed by the Executive of the Saskatchewan Teachers' Federation. The Board of Directors oversees governance and provides the strategic direction of the Foundation. The selection and evaluation of projects funded by the Foundation is carried out by a Project Review Committee appointed by the Board of Directors.

The Board of Directors has also approved a motion calling on the Foundation to respond to the Truth and Reconciliation of Canada's Calls to Action. While the Foundation is responding in a number of ways including funding research responding to the Calls to Action, our commitment to the Calls to Action and to reconciliation will continue.

## Our Mission

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**Enriching Teaching and Learning  
by Supporting Professionally  
Led Research**

# Boards, Committees, and Staff

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## Board of Directors

Sean Lockwood, President, McDowell Foundation

### Teacher Representatives:

Martin Berg  
Darren Bird  
Renée Carrière  
Jane Isinger, Superannuated Teachers of  
Saskatchewan  
Diana Jemieff Hayes, Vice-President  
Callie Lewry  
John Schultz  
Ramona Stillar  
Alexander Tawpisim

### Public Representatives:

Jim Traves  
Russ Mirasty



*(Left to right) Martin Berg, Callie Lewry, Alexander Tawpisim, Ramona Stillar, Diana Jemieff Hayes, Jane Isinger, Sean Lockwood, Renée Carrière, John Schultz, Jim Traves*

## Project Review Committee

### Teacher Representatives:

Jennifer Dorval  
Robin Heshka  
Deni Miclea  
Daniel Poirier

### University Faculty:

Dr. Terry Wotherspoon, Department of  
Sociology, University of Saskatchewan  
Dr. Twyla Salm, Health, Outdoor, Physical  
Education, University of Regina

## Federation Staff

Ellen Whiteman, Research and Policy Analyst | Saskatchewan Teachers' Federation, Manager | McDowell Foundation

Colleen Ostoforoff, Fundraising Administrator | McDowell Foundation

Nora Worby, Administrative Assistant | Saskatchewan Teachers' Federation | McDowell Foundation

Debbie Brown, Administrative Assistant | Saskatchewan Teachers' Federation

Scott Burant, Managing Director, Member Services | Saskatchewan Teachers' Federation

Jane Macleod, Senior Manager, Research and Records | Saskatchewan Teachers' Federation

Lisa Squires, Communications Officer | Saskatchewan Teachers' Federation

Additional supports are generously provided by Federation financial, people services, and information services.

# The Work of the McDowell Foundation

The McDowell Foundation supports the involvement of practising teachers as they engage in research that contributes to knowledge about teaching and learning. The Foundation affords teachers the opportunity to partake in critical inquiry whereby insights flourish and transform the educational landscape. Networks of colleagues deepen relationships and understandings through experimentation with innovative ideas and methodologies. The invaluable nature of the Foundation is reaffirmed by the wealth of research that has been created and the far-reaching impact of this relevant body of deep understanding.

The work of the Foundation focuses on four key areas: research program, public relations and communication, fiscal sustainability, and governance.

## Research Program

The primary activities of the McDowell Foundation are to provide research grants, support teachers and other educators in their research, and then assist with dissemination of the findings at the end of the project.

### Research Grants

In 2019-2020, the Project Review Committee recommended approval of six projects to the Board of Directors for a total of \$81,382 to be completed in 2020-21. The following projects received funding.

**Table 1: 2019-20 Funded Projects\***

Project Title	Research Team	Amount
<i>The Effect of a Community of Teachers Doing the Unsettling Work of Treaty Education in Rural Saskatchewan Classrooms</i>	Michael Graham Raquel Oberkirsch	\$ 16,757
<i>Learning Ecosystems: Connecting Social Constructivism and Distance Learning</i>	Racquel Biem	\$ 4,670
<i>Partnerships of Change: Transforming Language in Three-Way Conferences for English as an Additional Language (EAL) Student Success</i>	Shawna Jurgens Brenden Kroeger Zhi Li, Hyunjung Shin Shannon Storey	\$ 17,999
<i>Fostering a Maker Mindset: Supporting Teaching and Learning in the 21st Century Classroom</i>	Cristyne Hebert Trevor Hlushko Amy Singh, Aaron Warner	\$ 10,460
<i>A Narrative Inquiry Into the Experiences of Indigenous High School Students Enrolled Within a Youth Leadership Pathway</i>	Brian Lewis, Michael Dubnewick Tristan Hopper, Brett Kannenberg Sean Lessard, Sophia Littlechief-Carteri, Tamara Ryba	\$ 15,867
<i>Francophone Women School Principals' Well-Becoming</i>	Monique Byers, Laurie Carlson Berg, Donna Lajeunesse	\$ 15,629
	<b>Grand Total</b>	<b>\$ 81,382</b>

\* The total amount paid out in research grants was \$82,342 as reflected in the Financial Statements.

## Education and Support for Researchers

In addition to providing research grants, the McDowell Foundation supports researchers as needed in all phases of their research from developing project proposals to sharing research results at conferences.

The McDowell Foundation offers workshops at each stage of the grant application process. Staff from the Saskatchewan Teachers' Federation assists with providing support to teachers and other educators. The workshops support teachers and other researchers to become aware of the values and purposes of the Foundation and their role in manifesting these values and purposes in the field.

Part of the grant-writing workshop is devoted to discussing the many ethical issues that may arise in the course of school-based research and the steps that teacher-researchers can take to avoid such problems through planning, communications, and collaboration. The workshops also allow new McDowell Foundation researchers to form an educational research support network and become familiar with the way that Foundation grants are administered and supported.

In addition the Foundation provides opportunity for research applicants to benefit from the experience and knowledge of the Project Review Committee by facilitating feedback from the Committee on first drafts of the research grant application. The Committee then reviews a final draft and makes recommendations to the Board on funding. This allows research teams to hear directly from the adjudicating Committee on how to strengthen their research applications.

Support continues for research teams after their applications are approved. The payment and reporting schedule for most McDowell Foundation projects includes the submission of a brief interim report that allows the Foundation to identify problems or changes in the research. For reasons that are sometimes beyond a researcher's control (e.g., changes in schools or teaching assignments, or events in the school or among the students), research cannot be completed as planned. The Foundation then works with the researchers to develop a research report that describes the research experience and encapsulates what was learned from it for the information of future researchers.

## Dissemination of Research

It is a basic expectation of every McDowell Foundation project that the researchers will submit a final research report that the Foundation can make publicly available. In previous years, this report was a written document that was published in hard copy and posted on the Foundation's website. However, the goal of the Foundation is to ensure that the results are disseminated as broadly as possible to other educators and has resulted in an expansion of acceptable formats for a final report to include written, visual, web-based, or other creative ways of sharing the research findings.

This past year, the Foundation was pleased to support the development of several resources in the area of Mathematics and Indigenous ways of knowing. In addition to seven developed lessons, there are three videos to support teachers and students. They can be accessed through the website at <http://mcdowellfoundation.ca/research/culture-based-school-mathematics-for-reconciliation-and-professional-development/>.

Final reports are published on the McDowell website. This year they include research reports, research pamphlets, videos, and Prezi and PowerPoint presentations.

The Foundation also occasionally funds research teams to present research findings at conferences within the province, across Canada, and internationally.

## McDowell Foundation Research Award

The McDowell Foundation Award was introduced in 1998 to celebrate the work of individuals who have made outstanding contributions to educational research. In 2013 the Board of Directors restructured the McDowell Foundation Award to celebrate the outstanding contributions to educational research from a contributing research team.

This year the Board of Directors selected the project entitled Promising Practices for Meaningful Family Engagement led by Pam Sawatzky as the McDowell Foundation Research Award recipient. Their research is profiled in this report.



*The Lieutenant Governor, His Honour, the Honourable Russ Mirasty presented the McDowell Foundation Research Award. (Left to right) Pamela Grasby Sawatzky, Amber Thompson, Carly Robson Gilchrist.*

# Research Profile



## Parent Engagement in Rural Schools

By Ellen Whiteman



*Families were invited to write a special message to their child on a rock that was displayed in the classroom. The children liked to read their personal rock message throughout the year.*

How to include parents in meaningful and authentic ways in their children's education has been a hot topic in Saskatchewan over the past few years. Home visits, unpacking the backpack nights, and new interactive applications such as ClassDojo and Seasaw have filled twitter feeds and other spaces exploring trends in education.

For three teachers in Sun West School Division, parent engagement is not just an event or an app but rather a core understanding of who they are as teachers and what kind of a relationship they want to have with their students and their families. Pam Sawatzky, Carly Robson Gilchrist, and Amber Thompson have been collaborating on a McDowell-funded research project for the past year exploring promising practices for parent engagement in their rural communities.

Their project started out asking key questions including:

- What practices offer possibilities for the meaningful engagement of parents?
- What are the critical elements of these practices that contribute to success?

Focus groups with parents and other staff members, as well as their own experiences as teachers living and working in rural communities, have shaped their understandings. Their hope was to identify possibilities for authentic and meaningful family engagement opportunities that recognize the vital role parents play in supporting the education of their children.

All three teachers live and work in the communities where they teach and believe that parent engagement may look different

in rural areas than it does in the city. They see their students and their families at hockey games, the grocery store, and around town. Engagement can look different in small communities where everyone knows them as teachers.

"It is a bit of a fishbowl," says Thompson. "At the same time, I already know some of the families from my son's hockey team or from last year's baseball season." "You already know many of the families of the students coming into your class," agrees Robson Gilchrist. "It is a matter of building on and deepening that relationship."

For all three teachers, the goal of parental engagement is ensuring that families are knowledgeable and comfortable with their child's learning and that parents and families are offering their own expert knowledge as the individuals who know the child best to support and enhance that learning process. "You are always looking for opportunities for two-way communication," says Sawatzky. "That might be an app, a visit, a phone call, or a chance meeting in the community, but it is all about the relationship."

However, the teachers also acknowledged the importance of ensuring there are healthy boundaries to ensure they do not feel "on" all of the time. "You have to set those clear expectations from the start," says Robson Gilchrist. "Families need to know you will respond, but you can't be responding to a Saturday night message immediately."

"Many of the practices to support family engagement that were identified by the research are not new or revolutionary but just good teaching," echoes Thompson. The team indicated that their work identified a shift in thinking about the value of family knowledge, and how it can best be included, as a vital starting point when thinking about parent and family engagement, especially in rural areas where opportunities for engagement are literally just around the corner.

The team's full research report is available at <http://mcdowellfoundation.ca/research/promising-practices-for-family-engagement>.

# Research Profile



## The Carrot River Math Reconciliation Experience

By Lisa Squires, Communications Officer



*Culture-Based School Mathematics for Reconciliation and Professional Development research team: (left to right) Daniel Sylvestre, Kevin Duchscherer, Sharon Meyer, Serena Palmer, Krysta Shemrock, Danielle Vankoughnett, Sari Carson, Glen Aikenhead (missing: Kelley Cardinal, Ted View).*

Grade 6 teacher Danielle Vankoughnett was excited to be invited to participate in a one-year research project to explore how rural teachers can incorporate Indigenous culture into the existing Saskatchewan mathematics curriculum.

Initially, she thought her team would be testing existing culture-based lesson plans. When she found out there weren't many out there and that they would be creating their own, her excitement momentarily morphed into fear.

"At the start of this journey, I was very scared because it's a huge project for a first-year teacher to take on," recalls Vankoughnett. "I didn't want to make a mistake, and I didn't feel comfortable integrating this into a mathematics class."

But Vankoughnett is not alone. She is part of a team of four educators who teach

Grades 5 to 12 at Carrot River Jr. Sr. High School in the North East School Division. The Culture-Based School Mathematics for Reconciliation and Professional Development project was funded by the McDowell Foundation and was led by researchers Sharon Meyer, Glen Aikenhead, and Danny Sylvestre. Together with local Elders and Knowledge Keepers, they guided the teachers on their professional development journey to build their cultural knowledge and competence.

Admittedly, when you think of learning, unlearning isn't the first thing that comes to mind; however, in order to create space to learn new perspectives and worldviews, teachers must first unlearn European-Canadian ways of knowing.

"This approach benefits all students," says Grade 5 teacher Serena Palmer, who has been teaching for 12 years. "In Western

mathematics, the thinking is right or wrong. Students need to know math problems don't have just one answer or only one approach to find the answer. Adding Indigenous thinking to a math lesson is one way to do this."

For principal Sari Carson, the fact that her school does not have a diverse student population made their participation all the more important. But before they could design and develop their lesson plans, the team first needed to learn about Indigenous mathematizing and culture.

"Delivering curriculum in an inclusive and well-rounded way is always a teacher's intent," says Carson. "Our teachers built relationships, asked questions, and learned the necessary background knowledge to be able to confidently incorporate Indigenous ways of knowing into their math lessons."

The learning journey began on August 31, 2018 with a professional development day at the Carrot River Jr. Sr. High School followed by small group work with Meyer and Dr. Aikenhead in September. In October, the group participated in two days of intense cultural immersion with Elder Albert Scott where they learned about the medicine wheel, Indigenous culture, spirituality, ceremonies, and protocol.

"It was awesome," says Kevin Duchscherer, who has been teaching Grades 7, 8, 9, and 10 math for the last 20 years. "It gave us the opportunity to become more comfortable with looking at Indigenous worldviews. The activities we did had a lot to do with collaboration and sharing. The Western

culture of education is very competitive, but this collaborative approach provides for deeper and more meaningful learning."

After developing lesson plans, the teachers would test them with students while Aikenhead would observe. The group would then discuss and refine their plans.

In the beginning, some of Vankoughnett's students did ask why they were learning about Indigenous culture in math instead of social studies.

"I told the students that the world is a lot bigger than Carrot River," says Vankoughnett. "As cool as we think our culture is, it's also cool to learn about other cultures and people."

For Principal Carson, the best part of the experience has been the level of student engagement she's witnessed.

"I was able to chat with Danielle's students," shares Carson. "Although the lesson was about math, the students were making connections to their own lives and cultures. So cool!"

All participating teachers agree this was more than a project, it was a life-changing experience. They now plan to build on what they've learned and hope others will join them on the road to reconciliation.

In total, the group created seven math lesson plans that can be found on the McDowell Foundation website [www.mcdowellfoundation.ca](http://www.mcdowellfoundation.ca).

# Research Profile



## Repski Brought the Streets to Her Students in Effort to Fully Understand Reconciliation

By Jens Nelson



*Denee Repski presenting her research project results at the 2020 Learning From Practice conference.*

Reconciliation is a word that is frequently referenced among educators, but Regina teacher Denee Repski felt strongly that merely talking about it was not sufficient. In an effort to bring a real-world feel to her 28 English Language Arts 30 students at Campbell Collegiate, the whole idea behind her McDowell Foundation-funded research project, *History Underground: The Road to Reconciliation*, was to actually make Regina's rather infamous North Central area the de facto classroom.

Repski shared with fellow educators at the Learning From Practice conference how strongly this resonated with students, many of whom by their own admission had never wandered the streets in that area let alone in the company of White Pony Lodge volunteers. As it turned out, that was just one of a number of alliances Repski helped to establish during what turned out to be a two-year preparation period. According

to Repski, it was important for the students to not only see the sites but also to gain invaluable insight from such respected community members as the late Elder Noel Starblanket, who shared his experiences of having attended a residential school in the city.

In the research project summary to the McDowell Foundation, Repski and Justin Harrison (who went on leave prior to the completion of the project) felt there was a lack of genuine engagement from students when it came to reconciliation and treaty education. "We opened a lot of doors along the way and exposed our students to a wide variety of people. The biggest thing overall was for them to genuinely learn the truth. As educators, we're not always doing it right when it comes to reconciliation. This was about moving things beyond the traditional walls of a classroom – to hear authentic voices. It brought reconciliation to life. It also

allowed our students to really show their strengths,” Repski noted.

Throughout her presentation, Repski frequently underscored the importance of allowing sufficient time to build trust and establish the all-important relationships that allow honest answers to come to the fore. “The people we connected with shared some very real and personal stories, and they offered so much of themselves to our class as a result of mutual trust. “What I wasn’t expecting when we started was the sort of connections we made with people in the community. We need to continue to maintain those and build on them in the future. I’ve developed lifelong relationships and friendships along the way,” Repski shared. “I kept a journal throughout, and it was incredible to see the change in the students and the shift that happened. Whereas before there had been a stigma there, the students started to feel more confident and aware of the real truths in our community. This was experiential learning for sure,” Repski said while adding that it also made her want to do a better job of teaching.

In an interview following the presentation, she was quick to acknowledge this had been life changing for her. “I was right alongside the kids on this journey and not just as a traditional teacher. Oftentimes I didn’t have the answers, but you reach out and find answers together, and you share and learn. I know it really shook the kids, and it made a tremendous impact in terms of how they see the world and understand the history and how it affects today’s society. Throughout all this, those kids now have a whole new reality,” Repski said.

She readily recalls how initially there was significant pushback from parents who actually went so far as to pull their children out. However, as Repski recalls, the students were immersed in the program and, as a result of what they were experiencing, shared these stories at home with their parents. “There was a lot to unpack, and it was hard for sure. I was exhausted by the end of the school year,” Repski sighed. One of the most powerful experiences to see was some of those same parents who had been opposed to their children’s participation actually came to the school to learn themselves before the year was over. “That was very powerful, and we laughed and cried together. It was probably the most meaningful experience of my teaching career. It was great to be able to bring everyone together and share and learn. It just re-enforced the idea that don’t be afraid to do things different, even if this was definitely heavier,” she conceded.

Familiar with Winnipeg-based educator Kevin Lamoureux’s respected presence on the subject of reconciliation, Repski said she is in full agreement with his assertion that, while not to blame for what happened in the past, they can be the change-makers so that these experiences are not repeated.

Repski shared her hope for the future by pointing out how a student who had participated in the project is now pursuing her post-secondary career as a nurse, who she said has that calling that she wants to do more. “Sometimes it just takes a bit of a nudge,” Repski smiled.

# 2019-20 Learning From Practice

The Learning From Practice Exchange of Teacher Knowledge and Research is the McDowell Foundation's annual exchange of teacher knowledge and research. The conference is held in Saskatoon each year.

The purposes of the Learning From Practice conference are:

- To share the results of research projects funded by the McDowell Foundation with the education community.
- To provide research skills and information to teachers and others who wish to undertake research.
- To build an educational research community among teachers, administrators, and researchers.
- To recognize outstanding contributions to educational research through the presentation of an annual award.
- To heighten awareness of the McDowell Foundation.

This year Learning From Practice was held on January 31, 2020 at the Saskatchewan Teachers' Federation building in Saskatoon. Over 70 people attended including research teams, teachers, pre-service teachers, and other education sector partners. Eight Foundation research teams presented their work on a variety of topics including:

- Catholic School Teachers Enacting Papal Encyclical *Laudato si'* (Praise Be To You – On Care For Our Common Home)
- Cross-Cultural Collaboration and Belonging in an Islamic School
- Exploring Reconciliation and Understanding Through Art
- History Underground: The Road to Reconciliation
- Indigenous Culture-Based School Mathematics for Reconciliation and Professional Development
- Navigating Elementary Schooling Across Borders: Refugee Children's Pre- and Post-Migration Experiences
- Promising Practices for Meaningful Family Engagement
- Stumbling Towards Enlightenment: How Diverse Lead Learners Helped Develop a System-Wide Instructional-Support Approach to Improve Indigenous Students' Achievement

The keynote address was provided by Chris Scribe, Nakota/Nehiyaw (Assiniboine/Cree) from the Carry the Kettle Nakoda Oyade. Chris is the director of the Indian Teacher Education Program (ITEP) at the University of Saskatchewan and a passionate advocate for Indigenous ways of knowing and education.



*Left: The Lieutenant Governor, His Honour, the Honourable Russ Mirasty addressing at Learning From Practice.*

*Right: The keynote speaker Chris Scribe inspiring educators at Learning From Practice.*

# Public Relations and Communication

The McDowell Foundation continues to communicate with donors, researchers, and the public through the Foundation's website, our Twitter account, and through communication channels made available through the Saskatchewan Teachers' Federation. These include member emails, school staff liaison meetings, profile pieces within the Saskatchewan Bulletin and the website along with other opportunities. The Foundation wishes to acknowledge the ongoing communication support provided by the Saskatchewan Teachers' Federation in ensuring continuing communication with teachers in the province.

We also publish the bi-annual Foundation newsletter entitled *McDowell Foundation News*. The newsletter is produced in spring and fall and is sent to all donors, made available on the website, and tweeted out. The Foundation has the opportunity to utilize the STF Facebook page to engage both teachers and the public.

Foundation staff also provide presentations and information displays at local association conventions and executive meetings, Annual Meeting of Council of the Saskatchewan Teachers' Federation, and the Superannuated Teachers of Saskatchewan's Annual General Meeting. Finally the Salon Series is designed to further research conversations within communities to build partnerships and further support teaching and learning.



# Fiscal Sustainability

The McDowell Foundation would gratefully like to thank everyone that contributed to the Foundation through recognized donations and gifts in support of its research program in 2019-2020. We are inspired by the dedication and generosity of the McDowell Foundation's donors. Donations increased from 2018 to 2019 by 34 percent showing that our donors continue to understand the value and help us inspire and support many worthwhile research projects from a wide range of individuals and organizations who continue to show their commitment to the Foundation by providing a solid foundation for its work.

COVID-19 overturned every facet of our lives and work changing funding climates and the financial challenges faced by many individuals and nonprofits. The McDowell Foundation continues to remain committed to providing information as it continues with its sound financial practices, active and diversifying fund development, strategically planning, thinking, and adopting to new and innovative ways to continue to strengthen our capacity. The McDowell Foundation is grateful as we continue to develop our partnerships to build capacity to achieve financial sustainability.

The action the provincial and federal government has taken in response to the COVID-19 pandemic was necessary to protect our public health while supporting household incomes. The magnitude and duration of the economic shock caused by COVID-19 will have important consequences for the long-term fiscal position of the Foundation. Although at this time we do not know what the future may bring, we are grateful for our financial management team who oversees the McDowell's endowment fund. Financial sustainability as the mix of revenue and expense continues to provide a strategic approach to sound financial sustainability through our strong financial practices, innovative fund development, strategic planning and thinking, and having the capacity to innovate our research through new Directed Calls. Transparency through consistent, efficient, and transparent use of our funds all strengthened our key ingredient of financial sustainability.

Building capacity is central to the performance of the Foundation by critically reviewing how our plans for the future will build capacity for ongoing success in the pursuit of the Foundation's mission objectives. Fundraising goals continue to grow the number of donors and to enhance the Legacy Giving Program.

One of the Foundation's strategic priorities set for 2019-2020 was to enhance the need to address fiscal sustainability through increased focus on grant writing along with the continued implementation of the Legacy Giving Program, fundraising, and continued exploration of external funding options to diversify funding.

## Donations to the Foundation

Donations to the McDowell Foundation may be made through bequests, payroll deductions for teachers and STF employees, donations of honoraria for corporate and organizational services, donations of payments for tutoring students, memorial gifts, gifts to honour special occasions or particular individuals, or donations of the proceeds from events held by teachers or superannuates. Table 2 indicates the amount of money received this year from the major types of donations. It shows that most of the Foundation's revenue from donations comes from unsolicited donations. Although this is recorded as a part of our fundraising campaigns, there are a significant number of people donating to the Foundation through payroll deduction. Over the past year, memorial donations (to honour deceased teachers) and donations made in honour of a celebration continued to be a source for our unsolicited donations. Each donation allowed us to continue funding teacher-led research projects like inclusion for children with exceptionalities; reconciliation; developing sense of belonging through land based-education; practicing anti-racist education, and more.

As we start our next fiscal year, we continue to investigate and innovate through creative measures to create real, everlasting change after COVID-19 as we temporarily pause for reflection and revise our

activities for innovative new calls for our teachers. This June 2020, the Foundation announced a new Directed Call for Research 2020 – COVID-19. The Directed Call for research will address the impact of the COVID-19 pandemic on public education in the K-12 system in Saskatchewan and focus on the challenges and opportunities for Saskatchewan educators as they return to school this fall.

**Table 2: Donations to the McDowell Foundation by Type in 2019-20**

Type of Donation*	Total Gifts
Bequests	\$6,000
Memorial Donations	\$3,080
Honour of Donations	\$350
Payroll Deductions/Pre-authorized Payments	\$5,260
Fundraising Activities or Campaigns	\$900
Undesignated	\$16,052

\* Donations may be included in multiple categories and are not a cumulative reflection of total donation revenue.

## Legacy for Learning Society

The McDowell Foundation Legacy for Learning Society honours teachers and other supporters who have made a decision to strengthen the next generations of teachers through a pledge of a legacy gift. The members know the importance of ensuring research that supports teaching and learning in our province is developed right here in the province by dedicated and passionate teachers who understand the needs of their students and the needs of the profession. These future gifts ensure the Foundation can continue to support the teachers and students of tomorrow.

This May, we looked forward to our second Legacy Society Pinning Ceremony but was canceled due to the COVID-19 pandemic. The McDowell Foundation was fortunate to have many of its donors and supporters remain a constant champion to the Foundation.

The Foundation was saddened with the passing of two members of the Legacy for Learning Society this past year.

Last December 2019, the passing of one of our loyal donors and members of the Saskatchewan Teachers’ Federation and Superannuated Teachers of Saskatchewan, A. S. Raymond Mynett, saddened us. We are grateful for Raymond Mynett for his final support by giving a legacy gift to the McDowell Foundation.



*Raymond Mynett*



*Harold Schultz*

In mid-May 2020, the McDowell Foundation’s office received further sad news that one of our first Legacy Giving leaders, Harold Schultz, passed away.

Raymond and Harold's final donations to the McDowell Foundation helps us continue supporting teachers in the province to explore innovative and thoughtful ways to ensure students continue to receive the highest quality public education. We feel privileged to be able to honour Raymond and Harold's memory of their commitment to teaching and education. We honour their memory by recognizing their family and their estates to the McDowell Foundation. We are grateful and graciously thank their estates for the support to the McDowell Foundation.

## Donor Recognition

The work of the McDowell Foundation has been made possible by the generosity of many people who understand the value of educational research to the improvement of teaching and learning in our schools. The names of all organizations and individuals who contributed financially to the Foundation in 2019-2020 are listed at the end of this report.

The Foundation shows its gratitude and appreciation to local teachers' associations and chapters of the Superannuated Teachers of Saskatchewan who donate to the Foundation each year. The Foundation honours and thanks each local association and superannuated chapter by providing a certificate of appreciation.

### Local Teachers' Associations

ALEF  
Christ the Teacher  
Good Spirit  
Horizon Regina Catholic  
Lloydminster  
Prairie South  
Prairie Spirit  
Prairie Valley  
Regina Catholic  
Saskatoon  
South East Cornerstone  
Tri-West

### Superannuated Teachers of Saskatchewan Superannuated Chapters

Last Mountain  
Nipawin  
Prince Albert  
Regina  
Saskatoon  
Souris-Moose Mountain  
South Central  
Unity

## Governance

Development and oversight of strategic direction, along with governance and fiduciary responsibilities, rest with the Board of Directors of the McDowell Foundation. Administrative and operational responsibilities are delegated to the Saskatchewan Teachers' Federation and are typically attended to by the Manager of the Foundation as determined by Federation policies and procedures.

## Investments

The McDowell Foundation fund is overseen by the Saskatchewan Teachers' Federation and managed by TD Asset Management. The goal of the Foundation is to establish an endowment fund that is large enough to support ongoing substantive research as well as cover the costs of governing and operating the Foundation. All research funded and supported by the Foundation is currently paid for through donations and the money accumulated in the Foundation fund.

## **Staffing, Facilities, and Equipment**

The Saskatchewan Teachers' Federation oversees the staffing needs of the McDowell Foundation and makes equipment and office space available to the Foundation in the STF building in Saskatoon. The Foundation reimburses the Federation for all direct expenses involved in operating the Foundation and pays an annual administrative fee to reimburse the Federation for indirect costs such as building maintenance.

In addition, in-kind support is provided to the Foundation by the Federation in the form of accounting, communications, investment, graphic design, and web support as well as research support. This ongoing support from the Federation has been instrumental in allowing the McDowell Foundation fund to grow towards its financial goals of sustainable, substantive research.

# Legacy Society Members

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## **Founding Members (alphabetical)**

**Anonymous**

**Shirley Humphries**

**Raymond Mynett**

**Harold Schultz**

# Donors to the McDowell Foundation

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The McDowell Foundation recognizes our donors and friends who have remembered the Foundation through a gift, a provision in a will, or other form of planned gift. Thank you!

## Donations In Honour Of

The McDowell Foundation is grateful to the many donors who choose, each year, to honour members of our community through gifts to the McDowell Foundation.

### Superannuated Teachers of Saskatchewan

*In lieu of Christmas gifts*

### Superannuated Teachers of Saskatchewan

*Karen Tzupa*

### Fred Herron on Retirement

*STS – Saskatoon Chapter*

## Donations In Memory Of

The McDowell Foundation is grateful to the many donors who choose, each year, to remember members of our teaching community through gifts to the McDowell Foundation.

### John Vanderhulst

Tammy Kanak

Diana Sproat

Lisa Reid

Heather Luce

Pamela Kuster-Vancise

Leslie Siermacheski

Darcy Schill

Warren Siefert

Shauna Blackmer

Corey Renwick

*Saskatchewan Teachers' Federation*

David Vetter

*STS – Unity Chapter*

Ken Moore

*Shirley Humphries*

Richard Ditrack

*Shirley Humphries*

### Deceased Chapter Members in the Past Year

*STS – Prince Albert Chapter*

Ethel Melnyk

*STF Staff*

Raymond Mynett

*David and Karen Meagher*

*Elizabeth Hansen*

*Loretta Feser*

*Mary Orr*

*Roger Marchand*

*St. George Orthodox*

*Cathedral*

*STS – South Central Chapter*

*Yvette Wojcik*

Josephine Stodalka

*Fred Herron*

Ruth Armstrong

*Fred Herron*

Bill Davenport

*Fred Herron*

### Harold Schultz

*Alec Postnikoff*

*Anonymous*

*Colleen Ostoforoff*

*Darrell Collins*

*Derwyn Crozier-Smith*

*Ellen Whiteman and Darren*

*Wooff*

*Fred Herron*

*Gary and Mary Ann Genge*

*Harold Chapman*

*Jean Nahachewsky*

*Kevin Schmidt*

*Mary Grant*

*Maureen Taylor*

*Maxine Stinka*

*Nora Worby*

*Terry McKague*

*Verna Boehm*

*Wayne Welte*

*READ 12 Group*

*Fred Herron*

*Eugene Pura*

*Marlow Rafoss*

*Oliver Siba*

*Peter Woje*

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## Up to \$499

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Adeoye, Bisi	Hu, Alice	Schrader, Leah
Anonymous	Jaigobin, Withman	Scott Lindsay, Jana
Augustyn, Gary	Jayson, Belinda	Schultz, John
Avery, Wayne	Jemieff Hayes, Diana	Serafini-Dillon, Janice
Banda, Angela	Keehborn, Denise	Siba, Oliver
Barker, Wendy	Keen, Brent	Smetaniuk, Coline
Barss, Derek	Kerr, Jennifer	Spencer-McLoughlin, Shelley
Boehm, Verna	Kissick, Gordon	Squires, Lisa
Boychuk, Tammy	Knipfel, Linda	St. George Orthodox Cathedral
Boytinck, Trevor	Kobelsky, Lisa	STF Gift Fund
Brown, Debbie	Len, Jana	STF – Staff Fundraising Activities
Burant, Scott	Leonard, Carmen	Stillar, Ramona
Chapman, Harold	MacDougall, Barry	Stinka, Maxine
Christ the Teacher Teachers’ Association	Marchand, Roger	Stone, Sara
Colleaux, Marc	McDowell, Kathleen	STS – Last Mountain Chapter
Collins, Darrell	McLean, Sherry	STS – Nipawin Chapter
Crozier-Smith, Derwyn	McKague, Terry	STS – Prince Albert Chapter
Devine, Mary-Jo	Meagher, Karen	STS – Souris-Moose Mountain Chapter
Devine, Monique	Munkler, Russell	STS – South Central Chapter
Donald, Ann	Nahachewsky, Jean	STS – Unity Chapter
Douziech, Joann	Neurauter Sajtos, Gail	Taylor, Maureen
Dubyna, Charlene	Nutrien	Tenaski, Connie
Dumont, Kendra	Orr, Mary	Thomson, Karen
Ehr, Sandra	Ostoforoff, Colleen	Tourangeau, Norine
Elliott, Joan	Phipps, Elizabeth	Trinh, Tam
Farrell, Chrisa	Postnikoff, Alec	Tzupa, Karen
Feser, Loretta	Powell, Cathy	Walker, F. Faye
Fraser, Lynn	Prairie South Teachers’ Association	Walters, Lesley
Girolami, Tammy	Pura, Eugene	Welte, Wayne
Grant, Mary	Rawlake, Donna	Whiteman, Ellen
Grevna, Brenda	Regina Catholic Teachers’ Association	Wojcik, Yvette
Hansen, Elizabeth	Reid, James	Woje, Peter
Herron, Fred	Sampson, April	Wood, Gen
Hingley, Jennifer	Sansom, Sherry	Worby, Nora
	Schmidt, Kevin	

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## \$500 to \$999

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ALEF	Lloydminster Teachers’ Association	STS – Regina Chapter
Genge, Gary	Prairie Valley Teachers’ Association	STS – Saskatoon Chapter
Good Spirit Teachers’ Association	Saskatchewan Teachers’ Federation	Tri-West Teachers’ Association
Humphries, Shirley	Benee Family Foundation	

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## \$1,000 to \$1,999

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Horizon Teachers’ Association	MacLeod, Jane
Krips, Ian	Prairie Spirit Teachers’ Association

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## \$2,000 to \$4,999

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Saskatoon Teachers’ Association	South East Cornerstone Teachers’ Association	Superannuated Teachers of Saskatchewan
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## \$5,000 and over

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Saskatchewan Teachers’ Federation

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## Estate Gifts

The McDowell Foundation recognizes donors whose gifts were made through realized bequests, trusts, or insurance between July 1, 2019 and June 30, 2020.

The Estates of:   Raymond Mynett  
                          Harold Schultz

# Financial Statements



Deloitte LLP  
Suite 400  
122 1st Avenue South  
Saskatoon SK S7K 7E5  
Canada

Phone: 306-343-4400  
Fax: 306-343-4480  
www.deloitte.ca

## Independent Auditor's Report

To the Saskatchewan Teachers' Federation Executive

### Opinion

We have audited the financial statements of Dr. Stirling McDowell Foundation for Research into Teaching Inc. (the "Organization"), which comprise the statement of financial position as at June 30, 2020, and the statements of operations and changes in net assets and cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies (collectively referred to as the "financial statements").

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Organization as at June 30, 2020, and the results of its operations and its cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

### Basis for Opinion

We conducted our audit in accordance with Canadian generally accepted auditing standards ("Canadian GAAS"). Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Statements* section of our report. We are independent of the Organization in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Other Information

Management is responsible for the other information. The other information comprises the information, other than the financial statements and our auditor's report thereon, in the Annual Report.

Our opinion on the financial statements does not cover the other information and we do not express any form of assurance conclusion thereon. In connection with our audit of the financial statements, our responsibility is to read the other information identified above and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit, or otherwise appears to be materially misstated.

We obtained the Annual Report prior to the date of this auditor's report. If, based on the work we have performed on this other information, we conclude that there is a material misstatement of this other information, we are required to report that fact in this auditor's report. We have nothing to report in this regard.

### Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is responsible for assessing the Organization's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Organization or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Organization's financial reporting process.

#### **Auditor's Responsibilities for the Audit of the Financial Statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Canadian GAAS will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with Canadian GAAS, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Organization's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Organization to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

*Deloitte LLP*

Chartered Professional Accountants  
September 24, 2020  
Saskatoon, Saskatchewan

**DR. STIRLING MCDOWELL FOUNDATION  
FOR RESEARCH INTO TEACHING INC.  
STATEMENT OF OPERATIONS AND CHANGES IN NET ASSETS  
year ended June 30, 2020**

	OPERATING FUND	RESTRICTED FUND	2020	2019
<b>REVENUES</b>				
Donations (Note 5 and 9)	\$ 20,428	\$ 11,172	\$ 31,600	\$ 21,456
Investment income (Note 3)	269,603	-	269,603	149,580
Saskatchewan Teachers' Federation grant (Note 9)	104,700	-	104,700	82,200
	<u>394,731</u>	<u>11,172</u>	<u>405,903</u>	<u>253,236</u>
<b>EXPENSES</b>				
Administrative (Note 9)	156,394	-	156,394	189,680
Fundraising campaign	37,305	-	37,305	740
Governance	7,349	-	7,349	6,882
Research grants	82,342	-	82,342	72,723
	<u>283,390</u>	<u>-</u>	<u>283,390</u>	<u>270,025</u>
<b>EARNINGS (DEFICIT) BEFORE UNDERNOTED</b>	111,341	11,172	122,513	(16,789)
<b>UNREALIZED LOSS IN MARKET VALUE OF POOLED INVESTMENT FUNDS</b>	<u>(144,091)</u>	<u>-</u>	<u>(144,091)</u>	<u>(47,525)</u>
<b>NET (DEFICIT) EARNINGS</b>	(32,750)	11,172	(21,578)	(64,314)
<b>NET ASSETS, BEGINNING OF YEAR</b>	1,873,704	121,659	1,995,363	2,061,094
<b>INTERFUND TRANSFERS</b>	17,300	(17,300)	-	-
<b>EMPLOYEE FUTURE BENEFITS RE-MEASUREMENTS (Note 7)</b>	<u>422</u>	<u>-</u>	<u>422</u>	<u>(1,417)</u>
<b>NET ASSETS, END OF YEAR</b>	<u>\$ 1,858,676</u>	<u>\$ 115,531</u>	<u>\$ 1,974,207</u>	<u>\$ 1,995,363</u>

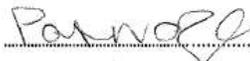
*The accompanying notes are an integral part of these financial statements.*

**DR. STIRLING MCDOWELL FOUNDATION  
FOR RESEARCH INTO TEACHING INC.  
STATEMENT OF FINANCIAL POSITION  
as at June 30, 2020**

	OPERATING FUND	RESTRICTED FUND	2020	2019
<b>CURRENT ASSETS</b>				
Cash	\$ 18,279	\$ -	\$ 18,279	\$ 23,737
Accounts receivable	197	-	197	239
Pooled investment funds (Note 3)	1,964,663	-	1,964,663	1,979,410
Due from Operating Fund		18,400	18,400	17,300
Prepaid expenses	1,847	-	1,847	375
	<u>1,984,986</u>	<u>18,400</u>	<u>2,003,386</u>	<u>2,021,061</u>
<b>DUE FROM SASKATCHEWAN TEACHERS' FEDERATION - GENERAL FUND (NOTE 9)</b>				
	40	-	40	-
<b>DUE FROM OPERATING FUND</b>				
	-	97,131	97,131	104,359
<b>INTANGIBLE ASSETS (Note 4)</b>				
	1,518	-	1,518	3,036
	<u>\$ 1,986,544</u>	<u>\$ 115,531</u>	<u>\$ 2,102,075</u>	<u>\$ 2,128,456</u>
<b>CURRENT LIABILITIES</b>				
Due to Restricted Fund	\$ 18,400	\$ -	\$ 18,400	\$ 17,300
Due to Saskatchewan Teachers' Federation (Note 9)	1,194	-	1,194	291
Accounts payable and accruals	11,143	-	11,143	10,398
	<u>30,737</u>	<u>-</u>	<u>30,737</u>	<u>27,989</u>
<b>DUE TO SASKATCHEWAN TEACHERS' FEDERATION - GENERAL FUND</b>				
	-	-	-	745
<b>DUE TO RESTRICTED FUND</b>				
	97,131	-	97,131	104,359
<b>NET ASSETS</b>				
Unrestricted	1,858,676	-	1,858,676	1,873,704
Externally restricted (Note 5)	-	115,531	115,531	121,659
	<u>1,858,676</u>	<u>115,531</u>	<u>1,974,207</u>	<u>1,995,363</u>
	<u>\$ 1,986,544</u>	<u>\$ 115,531</u>	<u>\$ 2,102,075</u>	<u>\$ 2,128,456</u>

The accompanying notes are an integral part of these financial statements.

**APPROVED ON BEHALF OF THE STF EXECUTIVE  
AND BOARD OF DIRECTORS**

  
.....STF Executive President

  
.....Chairperson of Board

  
.....Board Member

**DR. STIRLING MCDOWELL FOUNDATION  
FOR RESEARCH INTO TEACHING INC.  
STATEMENT OF CASH FLOWS  
year ended June 30, 2020**

	OPERATING FUND	RESTRICTED FUND	2020	2019
<b>OPERATING ACTIVITIES</b>				
Net (deficit) earnings	\$ (32,750)	\$ 11,172	\$ (21,578)	\$ (64,314)
Adjustments for:				
Amortization	1,518	-	1,518	1,518
Realized loss (gain) on sale of pooled investment funds	12,328	-	12,328	(8,440)
Unrealized loss in market value of pooled investment funds	144,091	-	144,091	47,525
	<u>125,187</u>	<u>11,172</u>	<u>136,359</u>	<u>(23,711)</u>
Changes in non-cash working capital	(6,273)	6,128	(145)	7,759
	<u>118,914</u>	<u>17,300</u>	<u>136,214</u>	<u>(15,952)</u>
<b>INVESTING ACTIVITIES</b>				
Pooled investment funds purchases	(651,924)	-	(651,924)	(324,878)
Pooled investment funds disposals	510,252	-	510,252	360,933
	<u>(141,672)</u>	<u>-</u>	<u>(141,672)</u>	<u>36,055</u>
<b>NET (DECREASE) INCREASE IN CASH</b>	(22,758)	17,300	(5,458)	20,103
<b>CASH POSITION, BEGINNING OF YEAR</b>	23,737	-	23,737	3,634
<b>INTERFUND TRANSFERS</b>	17,300	(17,300)	-	-
<b>CASH POSITION, END OF YEAR</b>	<u>\$ 18,279</u>	<u>\$ -</u>	<u>\$ 18,279</u>	<u>\$ 23,737</u>

*The accompanying notes are an integral part of these financial statements.*

**DR. STIRLING MCDOWELL FOUNDATION FOR RESEARCH INTO  
TEACHING INC.  
NOTES TO THE FINANCIAL STATEMENTS  
year ended June 30, 2020**

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**1. DESCRIPTION OF OPERATIONS**

Dr. Stirling McDowell Foundation for Research Into Teaching Inc. (the “Foundation”) is incorporated under *The Non-profit Corporations Act, 1995* of Saskatchewan and is registered as a charity with Canada Revenue Agency.

The Foundation is established to support research and dissemination to the public of information focusing on instruction (both teaching and learning) in the context of the public elementary and secondary education system.

Pursuant to Section 7(5) of *The Teachers’ Federation Act, 2006*, the Saskatchewan Teachers’ Federation (“STF”) is the trustee for the assets of the Foundation. The STF Executive appoints an administrative board to assist the STF Executive in fulfilling its fiduciary and oversight responsibilities.

**2. SIGNIFICANT ACCOUNTING POLICIES**

The financial statements have been prepared in accordance with Canadian accounting standards for not-for-profit organizations (“ASNPO”) in Part III of the CPA Handbook and reflect the following significant policies:

***Use of Estimates***

The preparation of the financial statements in conformity with Canadian accounting standards for not-for-profit organizations requires management to make estimates and assumptions that affect reported amounts of assets and liabilities, revenues and expenses and in the disclosure of commitments and contingencies. An example of such estimation is the useful lives of intangible assets and employee future benefits remeasurements. Changes in estimates and assumptions will occur based on the passage of time and the occurrence of certain future events. The changes will be reported in earnings in the period in which they become known.

***Employer Future Benefits***

All of the Foundation’s employees that are not members of a teachers’ pension plan are participants in the Saskatchewan Teachers’ Federation Employees’ Pension Plan, which has contributory defined benefit and defined benefit components. The STF is the sponsor of Saskatchewan Teachers’ Federation Employees’ Pension Plan.

**DR. STIRLING MCDOWELL FOUNDATION FOR RESEARCH INTO  
TEACHING INC.  
NOTES TO THE FINANCIAL STATEMENTS  
year ended June 30, 2020**

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**2. SIGNIFICANT ACCOUNTING POLICIES (continued)**

***Employer Future Benefits*** (continued)

The STF follows Part II Handbook Section 3462, *Employee Future Benefits* and Part III Handbook Section 3463, *Employee Future Benefits by Not-for-Profit Organizations* (“Section 3463”), for the measurement of the pension obligation and employee future benefit expense. Section 3463 requires the separate recording of pension obligation re-measurements in Net Assets. Accordingly, the Foundation’s portion of these re measurements has been recorded in Net Assets with an accompanying amount owing to (from) the STF.

***Intangible Assets***

Intangible assets are recorded at cost and amortized on a straight-line basis over its estimated useful life.

***Impairment of Long-Lived Assets***

Long-lived assets are tested for impairment whenever events or changes in circumstances indicate that their carrying value may not be recoverable. An impairment loss is recognized when their carrying value exceeds the total undiscounted cash flows expected from their use and eventual disposition. The amount of the impairment loss is determined as the excess of the carrying value of the asset over its fair value.

***Pooled Investment Funds***

Pooled investment funds are recorded at fair value.

***Fund Accounting***

The Operating Fund accounts for the Foundation’s programs and administrative activities.

The Restricted Fund reports only restricted resources that must be held by the Foundation for 10 years prior to their use.

**DR. STIRLING MCDOWELL FOUNDATION FOR RESEARCH INTO  
TEACHING INC.  
NOTES TO THE FINANCIAL STATEMENTS  
year ended June 30, 2020**

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**2. SIGNIFICANT ACCOUNTING POLICIES (continued)**

***Revenue Recognition***

The Foundation follows the restricted fund method whereby externally restricted contributions are recognized in the fund corresponding to the purpose for which they were contributed. Unrestricted contributions are recognized as revenue in the operating fund. Donations are recognized as revenue when the money is received.

Grants are recognized as revenue when they are received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured.

Interest on pooled short-term investments and deposits is recognized as revenue as it is earned. Dividend income from pooled bonds and debentures and equities is recognized as revenue when received. Gains and losses that arise from the sale of investments or that arise from changes in market values are recognized in income in the period that the gains and losses occurred.

***Financial Instruments***

Financial assets and financial liabilities are recognized when the Foundation becomes a party to the contractual provisions of the instrument.

Financial assets and liabilities are initially recognized at fair value and their subsequent measurement is measured at amortized cost, except for pooled investment funds which are measured at fair value as at the reporting date. Changes in fair value, including realized and unrealized gains and losses, are recorded in the Statement of Operations and Changes in Net Assets.

Fair values are based on quoted market prices, specifically the latest bid price, where available from active markets, otherwise fair values are estimated using a variety of valuation techniques and models. Financial assets purchased and sold, where the contract requires the asset to be delivered within an established time frame, are recognized on a trade-date basis. Transaction costs are expensed as incurred for pooled investment funds. Transaction costs related to other financial instruments are netted against the carrying value of the asset or liability and are then recognized over the expected life of the instrument using the effective interest method.

**DR. STIRLING MCDOWELL FOUNDATION FOR RESEARCH INTO  
TEACHING INC.  
NOTES TO THE FINANCIAL STATEMENTS  
year ended June 30, 2020**

**3. POOLED INVESTMENT FUNDS**

	<b>2020</b>	<b>2019</b>
Bonds	\$ <b>680,854</b>	\$ 709,632
Equities		
Canadian	<b>415,408</b>	443,127
Foreign	<b>773,943</b>	737,189
Short-term investments and deposits	<b>94,443</b>	89,447
	<b>1,964,648</b>	1,979,395
Other	<b>15</b>	15
	<b>\$ 1,964,663</b>	\$ 1,979,410

TD Asset Management is the investment manager appointed by the STF to manage the assets of the Foundation.

The Foundation's investment income is as follows:

	<b>2020</b>	<b>2019</b>
Interest	\$ <b>1,174</b>	\$ 1,153
Other income	<b>240</b>	2,176
Dividends	<b>280,517</b>	137,811
Realized (loss)/gain on sale of pooled investment funds	<b>(12,328)</b>	8,440
	<b>\$ 269,603</b>	\$ 149,580

**4. INTANGIBLE ASSETS**

	Rates	Cost	Accumulated Amortization	Net Book Value
Computer software	5 yrs.	\$ 7,590	\$ 6,072	\$ 1,518
<b>2020 Totals</b>		<b>\$ 7,590</b>	<b>\$ 6,072</b>	<b>\$ 1,518</b>
2019 Totals		\$ 7,590	\$ 4,554	\$ 3,036

The current year amortization is \$1,518 (2019 – \$1,518). The amortization expense is included in the administrative expenses in the Statement of Operations and Changes in Net Assets.

**DR. STIRLING MCDOWELL FOUNDATION FOR RESEARCH INTO  
TEACHING INC.  
NOTES TO THE FINANCIAL STATEMENTS  
year ended June 30, 2020**

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**5. EXTERNALLY RESTRICTED NET ASSETS**

In some instances, the donor has specified the donation to the Foundation be held for 10 years. The aggregate amount of donations received under these directions will be available for use in general operations as follows:

	<u>2020</u>	<u>2019</u>
June 30, 2020	-	17,300
June 30, 2021	<b>18,400</b>	18,400
June 30, 2022	<b>11,901</b>	11,901
June 30, 2023	<b>13,087</b>	13,087
June 30, 2024	<b>12,762</b>	12,762
June 30, 2025	<b>6,379</b>	6,379
June 30, 2026	<b>13,310</b>	13,310
June 30, 2027	<b>9,825</b>	9,825
June 30, 2028	<b>9,355</b>	9,355
June 30, 2029	<b>9,340</b>	9,340
June 30, 2030	<b>11,172</b>	-
	<u><u>\$ 115,531</u></u>	<u><u>\$ 121,659</u></u>

**6. GRANT COMMITMENTS**

The aggregate maximum grant payments under the terms of the research awards for 2021 is \$81,382 (2020 - \$79,161).

In some instances the payments to the grant recipients will be less than the amounts stated in the research awards, and as a result, the above amount may decrease.

**7. EMPLOYEE FUTURE BENEFITS**

ASNPO 3463 requires separate identification of re-measurements from the other pension costs thereby allowing visibility to the impact resulting from the periodic re-measurements.

In the current year, the following financial statement items were affected by the following amounts:

	<u>2020</u>	<u>2019</u>
Employee future benefits re-measurements	\$ (422)	\$ 1,417
Net earnings	422	(1,417)

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**8. FINANCIAL INSTRUMENTS**

The Foundation is exposed to various risks through its financial instruments. The following analysis provides a measure of the Foundation's risk exposure and concentrations at June 30, 2020.

The Foundation has a written *Investment Objectives and Policy Statement* ("IOPS") and an *Investment Management Guidelines Statement* ("IMGS").

The STF Executive approves the IOPS and delegates governance responsibilities for management of the assets of Foundation funds through the approval of the terms of reference. The IOPS is formally reviewed at least annually, and changes are made to it, if and when appropriate. The STF Executive approves amendments to the IOPS as recommended by the Investment Committee.

The Investment Committee establishes the IMGS to address the unique investment objectives and constraints for the Foundation, as well as outlining relevant legislation and governance. The IMGS is reviewed at least annually, and changes are made to it, if and when appropriate. The IMGS is shared with the STF Executive for information.

***Market Risk***

Market risk is the risk of loss that may arise from change in market factors such as interest rates, foreign currency rates and equity prices. The Foundation is exposed to this risk in its investing activities.

The investment manager is responsible for managing market risk in accordance with the Foundation's IOPS and IMGS. The investment manager reports quarterly, to the Investment Services Unit, on their performance which includes compliance with the policy and regulatory requirements. All exceptions noted are to be reported to the Investment Committee.

***a) Interest rate risk***

Interest rate risk refers to the adverse consequences of interest rate changes on the Foundation's cash flows and net assets.

The investment portfolio of the Foundation is directly exposed to interest rate risk in respect of its bonds and short-term pooled investments. Fixed rate instruments subject the Foundation to a fair value risk while the floating rate instruments subject it to a cash flow risk.

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**8. FINANCIAL INSTRUMENTS** (continued)

***Market Risk*** (continued)

a) *Interest rate risk* (continued)

To manage the interest rate risk, the Investment Committee has adopted an approach whereby investments are strategically distributed, on a long-term basis, among several classes of assets to reduce exposure to investment volatility.

b) *Foreign currency risk*

Foreign currency exposure arises from the Foundation's holdings of non-Canadian investments, which as at June 30, 2020, consist of pooled investments which comprise 39% or \$773,943 (2019 – 37% or \$737,189) of the total portfolio.

Maximum exposure in any single foreign investment is 10% of the market value of the Foundation's foreign equity portfolio. Investments in individual equities shall not exceed 10% of the outstanding shares of the issuing corporation and at least 20 different equity holdings shall exist in the investment manager's portfolio, either directly or through index replication instruments. No more than 15% of the foreign equity portfolio shall be invested in stocks that fall outside of the relevant benchmark index.

c) *Equity price risk*

Equity price risk is the risk that the fair value or future cash flows of an equity investment will fluctuate because of changes in market prices (other than those arising from interest rate risk or foreign currency risk), whether those changes are caused by factors specific to the individual equity instrument, or factors affecting similar equity instruments traded in the market.

The investment portfolio is directly exposed to equity price risk in respect of its pooled equities which total \$1,189,351 at June 30, 2020 (2019 – \$1,180,316).

The IMGS limits the total direct investment in a single equity investment to 10% of the total market value of the Foundation's Canadian equity portfolio. At least 20 different Canadian equity holdings shall exist in the portfolio, either directly or through index replication instruments. No more than 15% of the Canadian equity portfolio shall be invested in stocks that fall outside of the S&P/TSX composite index.

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**8. FINANCIAL INSTRUMENTS** (continued)

***Credit Risk***

The business of the Foundation necessitates the management of credit risk. Credit risk is the potential financial loss resulting from the failure of a customer or counterparty to settle its financial and contractual obligations of the Foundation, as and when they fall due.

The Foundation limits credit risk by dealing with investees that are considered to be of high quality.

Credit risk concentration exists where a significant portion of the portfolio is invested in securities which have similar characteristics or obey similar variations relating to economic or political conditions.

This risk is managed by strategically diversifying investments, on a long-term basis, among several classes of assets.

The assets of the Foundation are directly exposed to credit risk in respect of its pooled fixed income funds, pooled short-term funds, receivables and cash.

As at June 30, 2020, the Foundation's maximum exposure to credit risk was \$793,813 (2019 – \$823,055) being the total of the market values of these assets.

The IMGS requires that all short-term investments have a minimum rate of R1 or equivalent rating as rated by a recognized bond rating agency at time of purchase.

The IMGS limits the Foundation to holding not more than 5% of the market value of fixed income securities in any one non-government entity. Private placement bonds shall not exceed 5% of the fixed income portfolio market value.

Foreign currency exposure is limited to 10% of the market value of the fixed income portfolio.

None of the assets in the investment portfolio are past due or impaired as at June 30, 2020 (2019 – none).

***Liquidity Risk***

The business of the Foundation necessitates the management of liquidity risk. Liquidity risk is the risk of being unable to meet financial commitments, under all circumstances, without having to raise funds at unreasonable prices or sell assets on a forced basis.

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**8. FINANCIAL INSTRUMENTS** (continued)

***Liquidity Risk*** (continued)

As at June 30, 2020, the Foundation has current financial liabilities of \$30,737 (2019 – \$27,989) relating to due to Restricted Fund and accounts payable and accruals.

At June 30, 2020, the Foundation held cash and money market instruments, as well as bonds and equities which are readily available to settle such obligations.

On March 11, 2020 the World Health Organization characterized the outbreak of a strain of the novel coronavirus (COVID-19) as a pandemic which has resulted in a series of public health and emergency measures that have been put in place to combat the spread of the virus. These public health and emergency measures resulted in an economic slowdown, restrictions on public gatherings and activities. The duration and impact of COVID-19 is unknown. Potential impacts include loss of revenue, challenges associated with a remote or unavailable workforce and potential asset impairment.

**9. RELATED PARTY TRANSACTIONS**

The STF Executive is the sole member of the Foundation and elects individuals to serve as directors of the Foundation. The STF provides administrative support to the Foundation.

***Revenues***

The Foundation has received a total of \$105,250 (2019 – \$82,700) in funds from the STF for the year. \$104,700 (2019 – \$82,200) of this is related to an annual grant, \$550 (2019 – \$500) is received as donations made on behalf of members who passed away in the year.

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**9. RELATED PARTY TRANSACTIONS (continued)**

*Administration*

During the year, the Foundation incurred the following administration costs from the STF, which are included in administrative expenses on the Statement of Operations and Changes in Net Assets:

	<u>2020</u>	<u>2019</u>
Administration fees	\$ 142,491	\$ 125,969

At the end of the year, the amount due to Saskatchewan Teachers' Federation, and expected to be settled in the next 12 months, is \$1,194 (2019 – \$291).

At the end of the year, the amount due from (to) Saskatchewan Teachers' Federation – General Fund, and not expected to be settled in the next 12 months, is \$40 (2019 – (\$745)).



