

Kerby Centre
for the 55plus



Annual Report
2017
Celebrating Legacy



Kerby Centre

Kerby Centre Board of Directors



Zane Novak
President

Zane Novak, President

Hank Heerema, Past President
Richard Parker, Vice President
Kenneth Lin, Treasurer
Tara Weber, Secretary
Philip Dack, Director
Stephanie Sterling, Director

Our Mission

To assist older people to live as well as possible for as long as possible as residents in the community.

Our Vision

A happy, healthy senior population.

Message From Zane Novak, President of the Kerby Centre Board

Kerby Centre continues to be the leader in programming, services, and supports for older adults in Alberta. The work done by the staff and volunteers is the model for many other organizations across North America who are seeking to follow best practices and achieve excellence.

As President of the Board of Directors, I am very pleased to report that the leadership of Kerby Centre has shown exceptional commitment to sound financial processes. During the financial challenges of our province in the past years, Kerby Centre has consistently shown a small surplus each year.

This is not an easy task to accomplish in this economic climate, especially when we in Alberta have seen charitable donations drop by double digits in 2017.

It takes a great deal of honest and careful work to achieve this goal every year. Hard choices and difficult sacrifices must be made. The senior staff at the Centre evaluates

how every dollar is used. We on the Board have tremendous faith in the staff and leadership of the Centre to use our funds wisely, in ways that best serve the older adult community.

I invite you to look over the financial information included in this report. To give you an overview, approximately 42% of Kerby Centre's revenue is from government funding, 8% from donations, and 46% from earned revenue. Kerby Centre has a strong history of social enterprise and earned revenue includes income from program fees, room rentals, dining room sales, advertising revenue from our publications, and sales in our shops, along with a few other areas.

The Board continued to focus on relocation planning. In August, Calgary City Council unanimously approved a motion to work collaboratively with the Kerby Centre on a relocation plan that would potentially see Kerby Centre relocate to city-owned lands on the intersection of Haddon Road and

Heritage Drive southwest – former home of the YMCA.

Kerby Centre staff embarked on an extensive business continuity plan in 2017. Identified as a priority after the 2013 Calgary flood, this plan encompasses all aspects of the Centre's services. The plan ensures Kerby Centre is ready at a moment's notice to face any emergency or service disruption, and provides a road map for immediately restoring services and supports.

I encourage all who read this report, to keep using our facility to the maximum. Together we keep Kerby Centre vibrant and relevant. We hope that when it comes to donations and support, that as individuals, we keep the Kerby Centre in mind so that it can always be a strong and essential part of the community we live in and cherish.

On behalf of the Board of Directors, thank you for making Kerby Centre part of your life.

Message From Luanne Whitmarsh, Kerby Centre CEO

When Kerby was awarded the Western Legacy Award from the Calgary Stampede we were so very appreciative!

It was a moment in time that demonstrated the strength in the years of Kerby meeting the needs of older people near and far.

We celebrate Legacy in different ways - ages, stages and pages!

The Legacy regarding ages are those years where we have learned and now we teach. The wisdom of aging is timeless – the lessons transcend the generations and trends. In the halls of Kerby Centre I often hear “we would never had said that to our parents,” but honestly, every generation has said that.

The Legacy regarding stages is how we have transitioned

through our lives. We begin at birth and start aging – being in care, then school, often next is post-secondary learning, family rearing, working, working, and working some more, then finally realizing that it is ok to not push so hard. To rest. Hopefully we have had good health and some prosperity that allowed us some pleasure to enjoy arts, culture, recreation, and even travel.

The Legacy regarding pages is how many books were read to us, how many we have read, or even wrote, and those which moved us to action, laughter, and tears. Learning from others is part of what it means to be human, and we learn and grow from reading and by letting writers educate and entertain us.

Legacy is described in the dictionary as “anything handed



down from the past.” That means that every one of us leaves a Legacy – and it is up to us to leave a good one.

Every year we review the Legacy of Kerby – How did we do? What do we need to learn? How do we do more as the needs continue to increase annually? The short answer is: the team is strong, the Board is engaged, and honoring people is simply what we do – every single day.

We build for the future every year because what we know is that every single person is worth it!



Kerby Centre was honoured with the Calgary Stampede's 2017 Western Legacy Award for Sustained Contribution by a Group.

Kerby Centre is very active in the community, building partnerships and creating learning opportunities. Kerby Centre CEO Luanne Whitmarsh is shown here explaining our programs and services to a group of students from Strathcona-Tweedsmuir School.

Kerby Centre's 72 Staff and 823 volunteers provide exceptional support and services for older adults.

Kerby Centre volunteer Lena McKenzie received an award at the 2017 Minister's Seniors Service Awards for her commitment to Alberta's seniors.





823
Volunteers
gave
56,786
hours of
their time

Volunteers are the lifblood of Kerby Centre. Woodworking projects (upper left, background) encourage learning from peers. Our volunteer appreciation event (upper right) is a time for volunteers to have fun and socialize. We thank all of our volunteers.

Kerby Centre is represented on a wide variety of outside committees and boards. Among them are:

Age Friendly Calgary

Alberta Association of Senior Centres

Alberta Council for Women's Shelters

Bow Valley College Health Care Aide and

Recreation Aide - Programs Advisory
Committee

Calgary Emergency Management Agency

Calgary Seniors Housing Forum

Canadian Association of Gift Planner, Alberta

South Chapter

Dementia Friendly Communities

East Action Seniors Team

Elder Abuse Response Team

Immigrant Seniors Advocacy Committee

Mental Health & Housing

Older Adult Council of Calgary

Seniors Advisory Forum

South Calgary Seniors Committee

Valuing Mental Health

Vibrant Calgary

South Calgary Interagency Network

South Fish Creek Network

West Village Development Committee



Kerby Centre partnered with the Calgary Leadership Forum to host the first all-candidates debate of the 2017 Mayoral election.

The Maple Leaf Quest had 313 participants track their steps over a 12-month walking program. They tracked 45,116 kilometers in total! The walks wrapped up with a hike in Banff in September.



Kerby Centre celebrated Canada's 150th birthday with numerous events and activities. Kerby Centre also worked with other organizations on the Art Age intergenerational art project which paired older adults with students.





3,920 people attended Kerby Centre events including Stampede Breakfast, Kerby Expo, and Remembrance Day ceremony.



Among other benefits, Kerby Centre members are invited to an annual members-only holiday meal with socializing and entertainment.



The Kerby Expo in September drew over 1,000 attendees who took part in learning, entertainment, and activities. The Expo is Kerby Centre's signature event and features 60 tradeshow booths as well as live music and educational presentations.

In 2017

25,234

**unique individuals
accessed Kerby Centre
programs & services**

Kerby Centre prides itself on having an open door to everyone regardless of race, religion, national or ethnic origin, colour, sex, age, financial situation, or physical or mental disability.



Fundraising

We want to share this inspiring story of why one of our donors supports Kerby Centre.

In 1999, the year Kerby Rotary Shelter opened, Desiree's mother died.

Desiree had cared for her mom, took her to her appointments, and ran errands for her. While caring for her ailing mother, Desiree witnessed many older adults being victimized and treated unfairly by agencies and people. Desiree felt if she had not been there as an advocate for her mother, this may have happened to her too.

Desiree has donated Christmas dinner and gifts to our shelter residents for many years in memory of her mother. She believes her donations help those who were not as fortunate as her mom.



Olga Belke was the oldest participant in the Scotiabank Calgary Marathon in 2017 and we were honoured she was part of Team Kerby. Our team raised over \$12,400 that went to support Kerby Centre programs and services.

Kerby Assembly
Statement of Financial Position
As of December 31

	<u>2017</u>	<u>2016</u>
ASSETS		
CURRENT		
Cash	\$ 676,739	\$ 1,171,759
Short-term investments	2,859,732	1,924,341
Accounts receivable	61,079	72,600
Inventory	9,081	8,865
Prepaid expenses	<u>34,589</u>	<u>39,175</u>
	3,641,220	3,216,740
PROPERTY AND EQUIPMENT	1,504,979	1,558,346
REMAINDER TRUST	<u>225,000</u>	<u>225,000</u>
	\$ 5,371,199	\$ 5,000,086
 LIABILITIES AND NET ASSETS		
CURRENT		
Accounts payable	\$ 143,212	\$ 176,200
Deferred revenue	<u>978,110</u>	<u>854,634</u>
	<u>1,121,322</u>	<u>1,030,834</u>
NET ASSETS		
Unrestricted fund	1,785,212	1,432,473
Restricted fund	1,236,177	1,237,698
Invested in property and equipment	<u>1,228,488</u>	<u>1,299,081</u>
	<u>4,249,877</u>	<u>3,969,252</u>
	\$ 5,371,199	\$ 5,000,086

Kerby Assembly
Statement of Operations
for the years ended December 31

	<u>2017</u>	<u>2016</u>
REVENUE		
Government grants	\$ 1,827,911	\$ 1,899,395
Services	2,060,389	1,854,029
Donations	357,525	419,331
Investment revenue	<u>162,034</u>	<u>126,320</u>
	<u>4,407,859</u>	<u>\$ 4,299,075</u>
 EXPENSES		
Salaries, wages, and contractors	2,830,671	2,948,143
Services	659,489	620,447
Administration	543,629	415,665
Amortization	<u>93,446</u>	<u>76,913</u>
	<u>\$ 4,127,235</u>	<u>\$ 4,061,168</u>
 EXCESS (DEFICIENCY) OF REVENUE OVER EXPENSES		
	\$ <u>280,624</u>	\$ <u>237,907</u>

Donations and Funding

Corporate

Calgary Municipal Land Corporation
Freehold Royalties Ltd
Kenneth Lin Professional Corporation
Nexen
Sherritt International
Schlumberger

Groups

Associated Canadian Travelers Calgary Club
British Pensioners Association of Western
Canada
Calgary Independent Food Merchants
Association
Elda Daniels Group
Fort Calgary Chapter IODE
German Ladies Choir of Calgary
Harvest Operations Corp Social Club
Hungarian Veterans' Association, Calgary
Chapter
Knox United Church
Rotary Club of Calgary South
Team Telus Cares

Foundations

ACBL Charity Foundation
Aqueduct Foundation
Maunder McNeil Foundation Inc.
Strategic Charitable Giving Foundation

The Donald and Eleanor Seaman Family
Foundation

Calgary Foundation Funds:

Anonymous Family Legacy Fund
Archibald and Levina Knight Fund
Colin and Margaret MacDonald Family Fund
Donald and Doreen Lougheed Gift Fund
Graydon and Dorothy Morrison Flow Through
Fund
Hicks Memorial Fund
Jim and Hope Smith Family Fund
Sapphire Foundation
Strathcona-Tweedsmuir Student Philanthropy
Project

Government Funders

Alberta Health
Alberta Community and Social Services
Alberta Labour
Alberta Seniors and Housing
Alberta Culture and Tourism
Alberta Justice and Solicitor General
Alberta Infrastructure
Citizenship and Immigration Canada
City of Calgary
Service Canada

Estates

Estate of Lucilla Irma Hoskin

In-Kind Donors

RNR Wellness
S2 Architecture
Under Wraps

Major Donors

Don Cook
Frederick Vine
Frieda Herrington
Gary Nissen
Graydon and Dorothy Morrison
Jacques Hebert
James Abajero
James Gray
Jean Lockhart
Jerry Fedun
Joan Snyder
John Brandt
John Lamb
June Wilson
Kuen May Ho
Lillian Leonard
Lou MacEachern
Luanne Whitmarsh
Malcolm Cullen
Myrna Johnson
Orest & Patty Kotelko
R and S Parker
Robert Gibson
Roy and Erma Wilson

Sherry Austin
Signe McIntosh
Stephanie Sterling

Kerby Centre would also like to thank the many groups, corporations, and individuals who support our special events through sponsorship, donation of gifts, monetary items, and time commitment.

Photo credits:

All photos by Kerby Centre except:
Page 5: Courtesy Western Legacy Awards
Page 6 (inset): Courtesy Minister Lori Sigurdson's office
Page 10 (upper left): Gordon Benzil
Page 10 (right): Frank Wood
Page 11 (lower left): Gordon Benzil
Back cover: Gordon Benzil



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