

APEGGA EDUCATION FOUNDATION

PRESIDENT'S REPORT FOR 2009

This was a good year for the APEGGA Education Foundation (AEF).

Work continued with the University of Alberta and the University of Calgary to operationalize the endowments that were made to each university in 2008.

Strong support was received from APEGGA to forge ahead with an aggressive fundraising program; AEF's largest undertaking to date. Thanks to our consultant, DTD Consulting Ltd, and the efforts of Bill Roggensack, Peggy Simons, Len Shrimpton and Phillip Mulder the campaign should be launched in the second quarter of 2010.

Donations, during a severe recession, increased marginally in 2009 which gives fresh hope that our fundraising goals will be met. Disbursements also increased with new commitments of \$35,000 annually to scholarships and bursaries at both the undergraduate and graduate levels.

The Board remains committed to increasing the Foundation's profile and its ability to raise and disburse funds in support of encouraging and educating future engineering and geoscience professionals. I would like to offer my thanks: (1) to retiring AEF Board members Peggy Simons, P.Eng. and Andy Gilliland, P.Eng. for their years of tremendous service, (2) to Swami Swaminathan and Stan Smuga-Otto for agreeing to step up to becoming Board members, and finally, (3) to Sandy Roth for making the job of AEF President much easier.

Awards, Medals and Outreach

This is what AEF is all about. We are currently:

- Awarding scholarships and bursaries to deserving students at the University of Alberta and the University of Calgary in undergraduate programs in engineering, geology and geophysics; and at Mount Royal University in undergraduate geology.
- Awarding medals for high academic performance at the U of A and U of C in Engineering (16) and Geoscience (4).
- Funding outreach programs at the U of A and the U of C to ensure the best and brightest are attracted to our professions.

You will want to refer to the list of successful students (found later in this Report) who received financial support from the Foundation.

The Foundation increased its disbursement commitments to \$172,200 with the following new awards approved for 2010.

- Integrated Petroleum Geoscience Masters Program – U of A – two @ \$5,000
- Graduate Engineering Programs – U of A & U of C - four @ \$5,000
- Undergraduate Geology Program – MRU – two @ \$2,500

Donor and student recognition events at both the U of A and the U of C were attended by Board members. We have all been impressed with the quality and level of scholarship in Alberta.

We are also considering an endowment to Mount Royal University for their undergraduate degree program in Geology.

Fund Raising Plan

We began by hiring fundraising consultant, DTD Consulting, who started by undertaking a feasibility study that confirmed that our targets were achievable, and perhaps even too modest. This work has been followed up with the development of a Case for Support, a Case Statement and a Fundraising Plan & Policies.

AEF goals on the fund raising side are:

- (1) to increase individual Member contributions from \$100,000 to, at least, \$400,000 per year,
- (2) to increase corporate donations to, at least, \$100,000 per year,
- (3) to have corporations match employee contributions, where applicable
- (4) to maintain APEGGA donation from the Summit Award Gala in the \$45,000 range,
- (5) to quadruple the number of Members using the BMO Affinity Master Card thereby increasing payments from \$5,000 to \$20,000 per year

AEF goals on the disbursement side are:

- (1) to double the endowments at the U of A and U of C,
- (2) to set up an endowment at Mount Royal University,
- (3) to at least double the amount and number of scholarships,
- (4) to at least double the funding for outreach, and
- (5) to hire full-time staff.

It is anticipated that within five years, all of the goals will be realized and surpassed.

Key to the success of this campaign will be the recruitment of volunteers within the Foundation and without. They will be needed for initial and follow-up telephone calls to members as well as visits to Permit Holders.

Financial

AEF revenues in 2009 were \$281,000 and disbursements were \$170,000 resulting in a net income of \$111,000. AEF has assets totaling \$327,000 with two \$50,000 GICs, one maturing in June 2011 and one maturing in April 2012. Please refer to the Audited Financial Statements that follow.

AEF was awarded a \$25,000 Community Spirit Grant by the Alberta provincial Government. This was used to partially pay for the FRP feasibility study and plan. AEF was encouraged to apply for a further \$25,000 grant in 2010 and we have done so.

AEF made top-up payments for scholarships and bursaries to U of A and U of C as the revenue generated from the endowments was not sufficient to underwrite all of the awards. This may have to continue for the next several years until the investment climate improves, AEF is able to increase the endowment levels and/or matching funds are released from the Alberta Government Access to the Future Fund.

Book Project

The author, John Gilpin, has completed the History of Bridges in Alberta research project and is in the final stages of editing the manuscript for publication. A publisher has not yet been selected but it is anticipated that the book will be published in 2010. The remaining \$26,000 left in the Book Project Account will be depleted by September 2010.

Scholarship, Bursary and Past Presidents' Medal Winners

Millennium Scholarships – valued at \$3,500

Manasi Rajagopal	Biological Sciences	University of Alberta
Erin Taggart	Biological Sciences	University of Alberta
Kanishka Jayawardene	Electrical Engineering	University of Calgary
Asha Olmstead	Science	University of Alberta
Jonathan Lim	Science and Medicine	University of Alberta
Connie Smith	Science	University of Alberta
Cameron Lee	Engineering	University of Alberta
Ruimeng Xing	Science	McGill University
Kirsten Miazga	Physical Education and Recreation	University of Alberta
Kathryn Stone	Science	University of Alberta

Undergraduate Scholarships and Bursaries - Variable Values

Rami Ismat Abou Ghanem	APEGGA Education Foundation A.C. Milroy Scholarship in Engineering	University of Calgary
George Co	APEGGA Education Foundation A.C. Milroy Bursary in Schulich School of Engineering	University of Calgary
Sina Keivani-Boroujeni	APEGGA Education Foundation A.C. Milroy Bursary in Schulich School of Engineering	University of Calgary
Audrey Kertesz	APEGGA Education Foundation Alberta Centennial Scholarship	University of Calgary
Natasha Oviatt	APEGGA Education Foundation R.O. Lindseth Scholarship in Geophysics	University of Calgary
Igor Senek	APEGGA Education Foundation Scholarship in Geology	University of Calgary
Hongye Ou	APEGGA Education Foundation R.O. Lindseth Bursary in Geosciences	University of Calgary
Matthew Hardman	APEGGA John A. Allan Scholarship in Geology	University of Alberta
Denys Grombacher	APEGGA Scholarship in Geophysics	University of Alberta
Julie Kitz	APEGGA H.R. Webb Scholarship in Engineering	University of Alberta
Shawn Greig	APEGGA H.R. Webb Scholarship in Engineering	University of Alberta
Monica Benson	APEGGA H.R. Webb Scholarship in Engineering	University of Alberta
Vignesh Devendran	APEGGA H.R. Webb Scholarship in Engineering	University of Alberta
Marc Parsons	APEGGA Rising Star Scholarship in Geology or Geophysics	University of Alberta
Jace Draganiuk	APEGGA Rising Star Scholarship in Geology or Geophysics	University of Alberta
Michael Friedrich	APEGGA Rising Star Scholarship in Geology or Geophysics	University of Alberta
Li Zhao	APEGGA Education Foundation Academic Excellence Award in Engineering	University of Alberta
Peter Lore	APEGGA Education Foundation Academic Excellence Award in Engineering	University of Alberta
Baligh-ur-Rehman Qureshi	APEGGA Education Foundation Academic Excellence Award in Engineering	University of Alberta
Vivek Malhotra	APEGGA Education Foundation Academic Excellence Award in Engineering	University of Alberta
Matthew Primmer	APEGGA Fund in Geology and Geophysics	University of Alberta
Matthew Hryciuk	APEGGA Fund in Geology and Geophysics	University of Alberta
Mitchell Liddell	APEGGA Fund in Geology and Geophysics	University of Alberta
Denys Grombacher	APEGGA Fund in Geology and Geophysics	University of Alberta

APEGGA Past Presidents' Medals

Jacky Chow	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Kitty Ho-Yeen Choy	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Marya Cokar	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Andrew Dueck	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Norbert Lange	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Lilia Pustovyk	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Ian Rutherford	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Michael Schleppe	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Christopher Bruton	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Devon Griffiths	APEGGA Past Presidents' Medal in Engineering	University of Calgary
Mark Szybunka	APEGGA Past Presidents' Medal in Chemical Engineering	University of Alberta
Alma Ornes	APEGGA Past Presidents' Medal in Civil Engineering	University of Alberta
Garrett Rieger	APEGGA Past Presidents' Medal in Computer Engineering	University of Alberta
Andrew Steadman	APEGGA Past Presidents' Medal in Electrical Engineering	University of Alberta
Ryan Tucker	APEGGA Past Presidents' Medal in Engineering Physics	University of Alberta
Shawn Lavoie	APEGGA Past Presidents' Medal in Mechanical Engineering	University of Alberta
Michal Zielinski	APEGGA Past Presidents' Medal in Materials Engineering	University of Alberta
Sharlene Cotton	APEGGA Past Presidents' Medal in Mining Engineering	University of Alberta
Beth Anderson	APEGGA Past Presidents' Medal in Petroleum Engineering	University of Alberta
Lauren Stieglitz	APEGGA Past Presidents' Medal in Geophysics	University of Alberta
Tiffany Borgel	APEGGA Past Presidents' Medal in Geology	University of Alberta

Funding for Post-Secondary Outreach Programs

University of Alberta - \$21,000

University of Calgary - \$24,000