

# **KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING (KDSCL)**

**54th ANNUAL REPORT**

**2006 - 2007**

**"CELEBRATING 54 YEARS OF  
COMMUNITY SERVICE"**

**THANK YOU!**

*Growing Together*



A Member of the  
Central Okanagan  
United Way

# KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

## MISSION STATEMENT

"To assist people with disabilities to reach their individual goals and to participate and contribute as equal members of the community.

## VISION STATEMENT

"Ours is of welcome. Join us in building communities that support and value the diverse abilities of all people".

## MANDATE

To promote, organize and support the education, training, development and welfare of all people with disabilities in a manner consistent with the Mission Statement, and bearing in mind always, the strengths and needs of the individual.

## VALUES STATEMENT

### WE BELIEVE EACH PERSON:

- First is entitled to the same rights and freedoms given to all citizens in our society.
- Is a person first; unique and valued.
- Is entitled to be treated with equality, dignity and respect.
- Has the right to self-determination.
- Has the right to make choices and informed decisions.
- Has the right to be informed on all matters that affect his or her life.
- Has the right to self-advocate, to learn to self-advocate or to choose an advocate to speak for them.
- Has the right to live and work in the least restrictive environment.
- Has the right to live, work and participate in all aspects of community life and therefore should be taught the necessary skills to do so.
- Has personal preferences and interests, therefore has the right to individualized service.
- Has the right to expect that service providers provide accountability for individualized services, advocacy when requested or required and positive representation of an individual.
- Is entitled to life long learning.
- Has the right to a supportive network of personal relationships with family, friends, advocates and acquaintances.
- Is entitled to good health, medical and dental care and aides or adaptations (something changed or added) that may be needed for greater independence.
- Is entitled to the right to treatment on a voluntary basis, the right to private consultation and confidentiality and the right to be informed and give consent as he/she chooses.
- Is responsible for his/her own actions and therefore is responsible for the consequences.

# KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

## MINUTES OF THE 53rd ANNUAL GENERAL MEETING

September 18, 2006, 7:00 pm  
555 Fuller Avenue, Kelowna, BC

1. The meeting was called to order by President, Gail Meier at 7:05 pm.
2. **Moved by David Paynter seconded by David Fidler that the agenda be accepted with an amendment, Councillor Michele Rule replaces Councillor Norm Letnik as the guest speaker. Carried.**
3. **Moved by Chuck Hopkins seconded by Jean Hadgraft that the minutes of the September 19, 2005 AGM be approved as circulated. Carried.**
4. Auditor Report: The Auditor's report was reviewed by Markus Schrott from BDO Dunwoody. Markus thanked management for their excellent work. He stated the audit went well. He read the covering letter of the auditors report, stating that it is qualified as is standard practice with non-profits. He stated there were not a lot of changes to assets and liabilities and there was a surplus for the year.  
**Moved by David Low seconded by Denis Gates that the audited financial statements be accepted as audited by BDO Dunwoody. Carried**
5. Treasurer's Report: Report included in the 53rd Annual Report.
6. Appointment of the 2005/2006 Auditors: **Moved by David Low seconded by David Fidler that the board of directors be given the authority to appoint the auditors for the 2006-2007 fiscal year. Carried.**
7. President's Report: Report included in the 53rd Annual Report. Gail Meier thanked the staff and Board of Directors for their hard work and success in achieving a 3-year accreditation designation.  
**Moved by David Paynter seconded by Chuck Hopkins that the President's Report be accepted as presented. Carried.**
8. Self-Advocate's Report: Report included in the 53rd Annual Report. Darryl Harrand stated that the self-advocates appreciated being included throughout the accreditation process. Chuck Hopkins commended the self-advocates for their work on behalf of people with disabilities.  
**Moved by David Fidler seconded by Jean Hadgraft that the Self-Advocates Report be accepted as presented. Carried.**
9. Election of Officers: David Fidler stated that the terms of four Directors concluded and 3 have allowed their names to stand for re-election for a two-year term: David Paynter, Chuck Hopkins and Denis Gates. Due to Astrid Metherral's pending move to Victoria, she is not seeking reelection to the board. In addition, Mindy Tompkins is stepping down and Kelly Tompkins, a representative from the

Kelowna Self-Advocate caucus has allowed his name to stand to replace Mindy. Jim Greenlay also allowed his name to stand. Jim is a very active member of KDSCL, serving numerous prior terms on the Board of Directors before stepping down two years ago. David Fidler called upon the membership three times, requesting nominations from the floor and with no forthcoming: **Moved by David Fidler seconded by David Low that David Paynter, Chuck Hopkins, Denis Gates, Kelly Tompkins and Jim Greenlay be appointed to the Board of Directors. Carried.**

10. Revised Constitution and Bylaws: Gail Meier stated that the Constitution and Bylaws were revised to reflect the current needs of the organization. Members received copies with the meeting notices and copies are available at the table out front. Strikethrough meant wording will be removed and bolded reflects additions. Gail Meier stated that the most significant changes are to bylaw 10.2 changing the quorum from 5 to 3 and bylaw 10.7 enabling directors to pass resolutions via email (page 5). Gail Meier asked if there were any questions. With no forthcoming:  
**Moved by Gail Meier seconded by Chuck Hopkins that the revised Constitution and Bylaws be accepted as presented. Carried.**
11. **Moved by Gail Meier that the meeting be adjourned at 7:15 pm.**
12. Gail Meier stated that we would convene for ten minutes and guest speaker, City of Kelowna, Councillor Michele Rule will begin her presentation.

# *President's Report*

# **PRESIDENT'S REPORT**

**2006 - 2007**

The board held a very successful strategic planning session in November with facilitators Hugh Culver and Duncan Houston. Much of the session focused on our goal to replace the building located at 555 Fuller Avenue. A planning document was developed identifying strategies to move forward. To that end, a great deal of time was spent working with the City of Kelowna to address their requirements to get final approval from council. Due to lengthily nature, drawings needed to be modified and changes made to the original plans. In addition a housing agreement was negotiated. We believe we are very close to satisfying all their requirements.

The board continued to lead with the establishment and revision of policy. In order to ensure they were accessible to all, the KDSCL policy and procedure manual was reviewed by representatives from the Kelowna Self-Advocate caucus to ensure most were plain language friendly.

The board met on a monthly basis, this year opting for lunch hour meetings which were conducive to most members' schedules. In between David Low and I continued to meet with Charisse to provide support and deal with any issues that arose.

Thank you again to Dennis Gates and his committee for their work on the Vipond Golf tournament fundraiser and the Kelowna Golf and Country Club for hosting this annual event.

Thank you to Dave Fiddler who is stepping down from the board after 4 years of service and the rest of the board of directors for their continued work on behalf of the society.

Thank you to the caring and dedicated staff for the work they do with the people we support.

Thank you to Charisse for hard work and demonstrating a strong work ethic.

It has been a pleasure working with Charisse and the board.

Respectfully submitted by Gail Meier

# *Treasurer's Report*

# **TREASURER'S REPORT**

## **2006 - 2007**

It is with pleasure that I submit the 2007 Treasurers Report for the Kelowna & District Society for Community Living. For the year ended March 31, 2007, the Society revenues exceeded expenditures by \$158,746. After many years of operating deficits, the Society now has an accumulated operating fund surplus of \$512,771.

Vipond golf revenue was lumped into donations. This includes \$15,000 revenue from the tournament and a \$25,000 donation from Rick Pushor's hole-in-one. On behalf of the board, I would again like to thank Rick for his very generous donation, the tournament organizers and the Kelowna Golf and Country Club for continuing to host this special event.

Due to an overall increase in Society expenses and unallocated wages and benefits, the Administration division of the Society reported a deficit of \$19,600. In 2006, the loss was \$502.

The Richter Street group home contributed \$10,764 to the 2007 operating surplus of the Society. This was the result of increased government contracts and tighter cost controls on this program.

Despite our investment in new computer technologies, the Day program provided net funds to the Society of \$24,093 during the year.

The KDI Wood Shop continues its success by increasing sales by approximately 25%, while keeping its overall operating expenditures to 2006 levels. As a result, revenues exceeded expenditures by an additional \$10,000 to \$25,014 for 2007.

Our other commercial venture, Larry's Cycle and Sports continued to struggle in 2007. Despite an increase in sales by \$47,000, the program's expenditures exceeded revenues by over \$35,000. The Board of Directors and management will be monitoring this program more closely in 2008 to ensure that despite operating losses, that it continues to meet the Society's objectives.

Integrated Career Opportunity continues to be source of great pride for our Society. It has been able to provide our participants with meaningful employment in the Kelowna area and at the same time, provide financial resources for other programs. In 2007, program revenues exceeded expenses by \$79,176

Again, it was another very successful year for Society. We need to continue down this path so that we may finally start and complete the building of an improved 555 Fuller Avenue Street facility. I wish to congratulate the management, staff and participants for their co-operation and hard work during the past year and continued success in the future.

Respectfully submitted by David Low, C.A.



# *Auditor's Report*



**KELOWNA AND DISTRICT SOCIETY  
FOR COMMUNITY LIVING**  
**Financial Statements**  
**For the year ended March 31, 2007**



**KELOWNA AND DISTRICT SOCIETY  
FOR COMMUNITY LIVING**  
**Financial Statements**  
**For the year ended March 31, 2007**

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## Auditors' Report

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### To the Members Kelowna and District Society for Community Living

We have audited the consolidated balance sheets of Kelowna and District Society for Community Living as at March 31, 2007 and the consolidated statements of revenue and expenditures, surplus and cash flows for the year then ended. These financial statements are the responsibility of the Society's management. Our responsibility is to express an opinion on these financial statements based on our audit.

Except as explained in the following paragraph, we conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we plan and perform an audit to obtain reasonable assurance whether the consolidated financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the consolidated financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall consolidated financial statement presentation.

In common with many charitable organizations, the organization derives revenue from fund raising, the completeness of which is not susceptible to satisfactory audit verification. Accordingly, our verification of these revenues was limited to the amounts recorded in the records of the organization and we were not able to determine whether any adjustments might be necessary to fund raising revenues, excess of revenue over expenditures, assets and surplus.

In our opinion, except for the effects of adjustments, if any, which we might have determined to be necessary had we been able to satisfy ourselves concerning the completeness of fund raising revenue, as referred to in the preceding paragraph, these consolidated financial statements present fairly, in all material respects, the financial position of the Society as at March 31, 2007 and the results of operations for the year then ended. As required by the British Columbia Society Act, we report that, in our opinion, these principles have been applied on a basis consistent with that of the preceding year.

Chartered Accountants

Kelowna, British Columbia  
May 30, 2007

# Kelowna and District Society for Community Living

## Consolidated Balance Sheet

March 31 2007 2006

### Assets

#### Current

Cash	\$ 196,065	\$ 217,073
Term deposits (Note 2)	49,558	301,920
Restricted cash (Note 3)	7,818	7,818
Accounts receivable	55,085	43,570
Prepaid expenditures	32,667	8,614
Inventories	100,471	96,065

441,664 675,060

#### Term deposits (Note 2)

330,026 -

#### Property, plant and equipment (Note 4)

456,322 166,871

**\$ 1,228,012 \$ 841,931**

### Liabilities and Deficit

#### Current

Accounts payable and accrued liabilities	\$ 216,650	\$ 214,859
Current portion of long term debt (Note 5)	237,436	5,861

454,086 220,720

#### Accrued sick time reserve (Note 6)

242,561 242,561

#### Long term debt (Note 5)

18,594 24,625

715,241 487,906

#### Net Surplus

Rental program deficit (Schedule 9) (Note 7)	(15,994)	(18,633)
Operating fund surplus (deficit)	(18,192)	111,042
Reserve fund surplus	346,665	125,231
Property, plant and equipment surplus	200,292	136,385

512,771 354,025

**\$ 1,228,012 \$ 841,931**

Approved on Behalf of the Board:

 \_\_\_\_\_ Director

 \_\_\_\_\_ Director

# Kelowna and District Society for Community Living

## Consolidated Statement of Revenue and Expenditures

March 31	2007	2006
<b>Revenue</b>		
Provincial government contracts	\$ 1,740,152	\$ 1,693,893
Sales	418,211	368,815
Individual funding	99,221	122,939
Other income	44,718	36,364
BC Housing Grant	85,098	70,145
Bingo revenue	30,000	30,000
United way	23,007	30,579
Client rent contributions	45,665	44,205
Donations	68,502	4,937
Golf tournament revenue	-	15,000
Interest income	8,716	3,498
	<b>2,563,290</b>	<b>2,420,375</b>
<b>Expenditures</b>		
Amortization	39,615	35,997
Automotive	55,050	51,006
Client education, recreation and transportation	21,908	19,537
Client incentive allowance	23,085	26,612
Cost of goods sold	195,043	171,611
Equipment rentals	9,192	7,346
Food	10,995	11,708
Insurance	12,761	11,685
Interest	11,473	1,975
Interest on long term debt	1,116	1,458
Office and miscellaneous	36,617	46,118
Professional fees	19,752	14,189
Property taxes	4,074	2,649
Rent	119,423	130,498
Repairs and maintenance	41,473	46,001
Society expenses	23,956	11,571
Staff development	13,685	19,983
Supplies	19,948	14,919
Technology enhancement	26,121	-
Utilities and telephone	40,694	39,478
Wages and benefits	1,678,563	1,721,290
	<b>2,404,544</b>	<b>2,385,631</b>
<b>Excess of revenues over expenditures</b>	<b>158,746</b>	<b>34,744</b>
<b>Surplus, beginning of year</b>	<b>354,025</b>	<b>319,281</b>
<b>Surplus, end of year</b>	<b>\$ 512,771</b>	<b>\$ 354,025</b>

The accompanying summary of significant accounting policies, notes and schedules are an integral part of these financial statements.

# Kelowna and District Society for Community Living

## Operating Fund Balance Sheet

March 31	2007	2006
<b>Assets</b>		
Cash	\$ 154,785	\$ 206,565
Term deposits (Note 2)	94,898	147,350
Accounts receivable	55,085	43,570
Prepaid expenditures	32,667	8,614
Inventories	100,471	96,065
Due from reserve fund	-	47,665
	<b>\$ 437,906</b>	<b>\$ 549,829</b>
<b>Liabilities and Deficit</b>		
Accounts payable and accrued liabilities	\$ 216,650	\$ 214,859
Due to reserve fund	12,881	-
Accrued sick time reserve	242,561	242,561
Rental assistance program deficit (Schedule 9) (Note 7)	(15,994)	(18,633)
Society surplus (deficit)	(18,192)	111,042
	<b>\$ 437,906</b>	<b>\$ 549,829</b>

# Kelowna and District Society for Community Living

## Operating Fund Statement of Revenue and Expenditures

March 31	2007	2006
<b>Revenue</b>		
Provincial government contracts	\$ 1,740,152	\$ 1,693,893
Sales	418,211	368,815
Individual funding	99,221	122,939
Other income	44,718	36,364
BC Housing grant	13,420	11,261
Bingo revenue	30,000	30,000
United way	23,007	30,579
Donations	2,894	3,542
Golf tournament revenue	-	15,000
Interest income	2,890	1,327
	<b>2,374,513</b>	<b>2,313,720</b>
<b>Expenditures</b>		
Administration	-	(1,381)
Amortization	39,615	35,997
Automotive	55,050	51,006
Client education, recreation and transporation	21,908	19,537
Client incentive allowance	23,085	26,612
Cost of goods sold	195,043	171,611
Equipment rentals	9,192	7,346
Food	10,995	11,708
Insurance	12,761	11,685
Interest	11,473	1,975
Interest on long-term debt	1,116	1,458
Office and miscellaneous	36,617	46,118
Professional fees	18,356	12,793
Property taxes	4,074	2,649
Rent	6,115	21,330
Repairs and maintenance	41,473	36,949
Society expense	23,956	11,571
Staff development	13,685	19,983
Supplies	19,948	14,919
Technology enhancement	26,121	-
Utilities and telephone	40,694	39,478
Wages and benefits	1,678,563	1,721,290
	<b>2,289,840</b>	<b>2,264,634</b>
<b>Excess of revenues over expenditures for the year</b>	<b>\$ 84,673</b>	<b>\$ 49,086</b>



## Kelowna and District Society for Community Living Operating Fund Statement of Surplus

March 31	2007	2006
Surplus, beginning of year	\$ 111,042	\$ 57,928
Contributions to property, plant and equipment (net)	(103,522)	(31,969)
Contributions to reserve	(150,000)	-
Amortization	39,615	35,997
	(102,865)	61,956
Excess of revenue over expenditures for the year	84,673	49,086
Surplus (deficit), end of year	\$ (18,192)	\$ 111,042

# Kelowna and District Society for Community Living

## Reserve Fund Balance Sheet

March 31 2007 2006

### Assets

Cash	\$ 41,280	\$ 10,508
Term deposits (Note 2)	284,686	154,570
Restricted cash (Note 3)	7,818	7,818
Due from operating fund	12,881	-
	<u>\$ 346,665</u>	<u>\$ 172,896</u>

### Liabilities and Equity

Due to operating fund	\$ -	\$ 47,665
Equity	346,665	125,231
	<u>\$ 346,665</u>	<u>\$ 172,896</u>

### Equity

	Balance beginning of year	Donations	Expenditures	Interest	Transfer from operating fund	Balance end of year
Building	\$ 105,407	\$ 65,608	\$ -	\$ 5,227	\$ 150,000	\$ 326,242
Discretionary	19,958	-	-	599	-	20,557
Richter	(134)	-	-	-	-	(134)
	<u>\$ 125,231</u>	<u>\$ 65,608</u>	<u>\$ -</u>	<u>\$ 5,826</u>	<u>\$ 150,000</u>	<u>\$ 346,665</u>

# Kelowna and District Society for Community Living

## Property, Plant and Equipment Balance Sheet

March 31	2007	2006
<b>Assets</b>		
Property, plant and equipment (Note 4)	\$ 456,322	\$ 166,871
<b>Liabilities</b>		
Long term debt (Note 5)	\$ 256,030	\$ 30,486
<b>Equity in Property, Plant and Equipment</b>		
Balance, beginning of year	136,385	140,413
Contributions from operating fund		
For debt reduction	9,956	5,535
For acquisition of property, plant and equipment	93,566	26,434
	103,522	31,969
Amortization	(39,615)	(35,997)
Balance, end of year	200,292	136,385
	\$ 456,322	\$ 166,871

# Kelowna and District Society for Community Living

## Consolidated Statement of Cash Flows

March 31	2007	2006
<b>Cash flows from operating activities</b>		
Cash receipts from customers and agencies	\$ 2,543,059	\$ 2,405,013
Cash paid to employees and suppliers	(2,379,006)	(2,297,142)
Interest paid	(12,589)	(3,434)
Interest received	8,716	3,498
	<u>160,180</u>	<u>107,935</u>
<b>Cash flows used in investing activities</b>		
Purchase of capital assets	(329,066)	(26,434)
Increase in temporary investments	(77,665)	(178,725)
	<u>(406,731)</u>	<u>(205,159)</u>
<b>Cash flows from financing activities</b>		
Repayment of long term debt	(9,957)	(5,534)
Proceeds from new debt issuance	235,500	-
	<u>225,543</u>	<u>(5,534)</u>
<b>Net decrease in cash</b>	<b>(21,008)</b>	<b>(102,758)</b>
<b>Cash, beginning of year</b>	<b>224,891</b>	<b>327,649</b>
<b>Cash, end of year</b>	<b>\$ 203,883</b>	<b>\$ 224,891</b>
<b>Consists of:</b>		
Cash	\$ 196,065	\$ 217,073
Restricted cash	7,818	7,818
	<u>\$ 203,883</u>	<u>\$ 224,891</u>

The accompanying summary of significant accounting policies, notes and schedules are an integral part of these financial statements.

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## Kelowna and District Society for Community Living Summary of Significant Accounting Policies

**March 31, 2007**

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**Nature of Business** The Society is incorporated under the laws of British Columbia and is in the business of providing education and training to mentally challenged individuals.

**Financial Instruments** It is management's opinion that the Society is not exposed to significant interest, currency, or credit risks arising from these financial instruments. The fair values of these financial instruments approximate their carrying values.

**Temporary Investments** Temporary investments are stated at the lower of cost and market value.

**Property, Plant and Equipment** Property, plant and equipment are stated at cost. Amortization based on the estimated useful life of the asset is as follows:

Workshop building	- 5% straight-line basis
Equipment	- 10% straight-line basis
Automotive	- 10% straight-line basis
Leasehold improvements	- 10% straight-line basis

Amortization commences in the month of acquisition.

**Inventory** Materials are recorded at the lower of cost and net realizable value. Finished goods are valued at wholesale selling price less a mark-up allowance.

**Revenue Recognition** The organization follows the deferral method of accounting for contributions. Restricted contributions are recognized as revenue in the year which the related expenses are incurred. Unrestricted contributions are recognized as revenue when received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured.

**Use of Estimates** The preparation of financial statements in accordance with Canadian generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from management's best estimates as additional information becomes available in the future.

# Kelowna and District Society for Community Living

## Notes to Financial Statements

**March 31, 2007**

### 1. Economic Dependence

The Society receives 68% (2006 - 70%) of its funding from government grants.

### 2. Term Deposits

	2007	2006
<b>Operating Fund</b>		
Matured during the year	\$ -	\$ 147,350
Term deposit, including accrued interest, maturing April 27, 2008, bearing interest at 3.00% per annum	94,898	-
	<u>94,898</u>	<u>147,350</u>
<b>Reserve Fund</b>		
Matured during the year	-	82,023
Matured during the year	-	72,547
Term deposit, including accrued interest, maturing July 22, 2008, bearing interest at 3.00% per annum	235,128	-
Term deposit, including accrued interest, maturing May 30, 2007, bearing interest at 2.25% per annum	49,558	-
	<u>284,686</u>	<u>154,570</u>
	<u>\$ 379,584</u>	<u>\$ 301,920</u>
Less: Current Portion	<u>49,558</u>	<u>301,920</u>
	<u>\$ 330,026</u>	<u>\$ -</u>

Of the total term deposits, \$49,558 (2006 - \$301,920) mature within one year and \$330,026 (2006 - Nil) mature in more than one year.

### 3. Restricted Cash

Under the terms of the agreement with British Columbia Housing Management Commission, these funds, along with accumulated interest must be held in a separate bank account and/or invested only in the accounts or instruments insured by the Canadian Deposit Insurance Corporation, or as may otherwise be approved by B.C.H.M.C. from time to time. The funds in the account may only be used as approved by B.C.H.M.C. At year-end the funds in this restricted reserve consisted of the following:

	2007	2006
Restricted cash	\$ 7,818	\$ 7,818

# Kelowna and District Society for Community Living

## Notes to Financial Statements

March 31, 2007

### 4. Property, Plant and Equipment

	2007		2006	
	Cost	Accumulated Amortization	Cost	Accumulated Amortization
Land	\$ 191,513	\$ -	\$ 26,513	\$ -
Building - workshop	352,135	204,603	198,855	198,855
Equipment	183,574	160,684	183,574	145,275
Automobile	157,168	103,323	157,168	89,378
Group home	108,746	74,150	97,960	70,657
Leasehold improvements	16,673	10,727	16,673	9,707
	<u>\$ 1,009,809</u>	<u>\$ 553,487</u>	<u>\$ 680,743</u>	<u>\$ 513,872</u>
Net book value		<u>\$ 456,322</u>		<u>\$ 166,871</u>

### 5. Long Term Debt

#### Mortgages payable

Interior Savings Credit Union, due on demand, payable in monthly instalments of \$1,710, including interest at 6.25% per annum, secured by property, due July 1, 2011.

\$ 231,421      \$ -

Canada Mortgage and Housing Corporation, payable in monthly instalments of \$583, including interest at 4.47% per annum, secured by property, due December 1, 2008.

24,609      30,486

256,030      30,486

Less: current portion

237,436      5,861

\$ 18,594      \$ 24,625

Principal payments due in the next four years are as follows:

<u>Year</u>	<u>Amount</u>
2008	\$ 237,436
2009	6,290
2010	6,577
2011	<u>5,727</u>
	<u>\$ 256,030</u>

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## Kelowna and District Society for Community Living Notes to Financial Statements

**March 31, 2007**

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### **6. Accrued Sick Time Reserve**

The accrued sick time reserve represents an internal allocation for sick leave costs. Management has reasonably estimated this amount to be the expected amount which the Society will incur as a result of employees requiring paid sick leave.

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### **7. Rental Assistance Program Surplus**

The Rental Assistance Program is jointly funded by Canada Mortgage and Housing Corporation and the Ministry of Lands, Parks and Housing for the Province of British Columbia. The Society is required to segregate the operating surplus under this program from the surplus of other programs.

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### **8. Commitments**

The Society has entered into a commitment to lease the bike shop premises expiring on December 31, 2007. Total monthly lease payments (including base rent, property taxes, fire insurance, and GST) are \$2,102.

The Society has entered into a lease agreement for a photocopier which expires in 2008. The minimum quarterly payments required under this agreement is approximately \$1678.

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### **9. Rounding**

Certain of the supplementary information schedules differ from Operating Fund's Statement of Revenues and Expenditures due to rounding differences.

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### **10. Comparative Figures**

The previous year's comparative figures have been reclassified to conform with the current year's financial statement presentation.



**Kelowna and District Society for Community Living**  
**Administrative Services Division**  
**Administration Revenue and Expenditures - Schedule 1**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Administration fees	\$ 148,436	\$ 149,387
Rental income	85,200	85,686
Donations	2,894	3,542
Golf tournament revenue	-	15,000
Other income	14,497	3,736
Interest income	2,890	1,314
	<u>253,917</u>	<u>258,665</u>
<b>Expenditures</b>		
Amortization	8,217	8,954
Automotive	1,219	877
Equipment rentals	9,192	6,720
Insurance	9,465	8,024
Interest	772	883
Office and miscellaneous	16,090	22,287
Professional fees	14,000	12,793
Property taxes	130	120
Repairs and maintenance	14,228	17,117
Society expense	15,993	5,571
Staff development	1,840	1,398
Utilities and telephone	17,058	16,729
Wages and benefits	165,313	157,694
	<u>273,517</u>	<u>259,167</u>
<b>Excess of expenditures over revenue for the year</b>	<b>\$ (19,600)</b>	<b>\$ (502)</b>

**Kelowna and District Society for Community Living**  
**Residential Services Division**  
**Richter Street Group Home Revenue and Expenditures - Schedule 2**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
BC Housing grant	\$ 13,420	\$ 11,261
Provincial government contracts	230,645	224,250
Rental income	36,000	36,000
	<b>280,065</b>	<b>271,511</b>
<b>Expenditures</b>		
Administration	19,061	19,061
Amortization	1,392	3,862
Automotive	1,787	2,145
Client education, recreation and transportation	409	608
Food	10,995	11,708
Insurance	1,944	2,183
Interest on long-term debt	1,116	1,458
Office and miscellaneous	1,408	1,588
Property taxes	2,230	2,529
Repairs and maintenance	2,096	1,694
Society expense	986	513
Staff development	403	873
Supplies	1,050	24
Technology enhancement	205	-
Utilities and telephone	5,051	5,179
Wages and benefits	219,168	221,996
	<b>269,301</b>	<b>275,421</b>
<b>Excess (deficiency) of revenue over expenditures for the year</b>	<b>\$ 10,764</b>	<b>\$ (3,910)</b>

**Kelowna and District Society for Community Living**  
**Pre-Vocational Services Division**  
**Day Service Revenue and Expenditures - Schedule 3**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Provincial government contracts	\$ 805,988	\$ 681,941
Other income	20,822	23,228
Bingo revenue	30,000	30,000
United way	23,007	30,579
	<b>879,817</b>	<b>765,748</b>
<b>Expenditures</b>		
Administration	64,742	58,900
Amortization	14,828	8,060
Automotive	20,408	20,677
Client education, recreation and transporation	17,227	13,021
Client incentive allowance	7,965	3,940
Insurance	498	-
Interest	9,747	69
Office and miscellaneous	2,764	3,173
Professional fees	4,356	-
Property taxes	1,714	-
Rent	33,600	33,600
Repairs and maintenance	7,929	1,607
Society expense	3,624	2,274
Staff development	3,047	7,642
Supplies	5,769	4,489
Technology enhancement	14,183	-
Utilities and telephone	4,202	1,033
Wages and benefits	639,121	576,839
	<b>855,724</b>	<b>735,324</b>
<b>Excess of revenue over expenditures for the year</b>	<b>\$ 24,093</b>	<b>\$ 30,424</b>

**Kelowna and District Society for Community Living**  
**Pre-Vocational Services Division**  
**Woodshop Revenue and Expenditures - Schedule 4**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Provincial government contracts	\$ 135,856	\$ 133,258
Sales	59,938	50,957
Other income	9,399	9,399
	<b>205,193</b>	<b>193,614</b>
<b>Expenditures</b>		
Administration	11,250	10,884
Amortization	3,716	4,112
Automotive	2,341	1,690
Client education, recreation and transporation	1,344	1,576
Client incentive allowance	7,597	8,721
Cost of goods sold	9,963	8,858
Equipment rentals	-	358
Office and miscellaneous	1,122	1,687
Rent	33,600	33,600
Repairs and maintenance	8,769	5,888
Society expense	499	353
Staff development	283	964
Supplies	3,428	4,872
Technology enhancement	2,624	-
Utilities and telephone	1,109	887
Wages and benefits	92,534	95,101
	<b>180,179</b>	<b>179,551</b>
<b>Excess of revenue over expenditures for the year</b>	<b>\$ 25,014</b>	<b>\$ 14,063</b>

**Kelowna and District Society for Community Living**  
**Pre-Vocational Services Division**  
**Wedding Belles & Baskets Revenue and Expenditures - Schedule 5**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Provincial government contracts	\$ 52,259	\$ 140,661
Sales	7,292	26,280
	<u>59,551</u>	<u>166,941</u>
<b>Expenditures</b>		
Administration	4,804	12,400
Amortization	526	1,319
Automotive	258	1,351
Client education, recreation and transportation	226	1,067
Client incentive allowance	2,381	7,098
Cost of goods sold	7,434	19,351
Equipment rentals	-	86
Insurance	178	739
Interest	197	456
Office and miscellaneous	1,170	3,348
Rent	7,831	27,150
Repairs and maintenance	280	1,436
Society expense	704	542
Staff development	106	612
Supplies	227	551
Utilities and telephone	2,405	7,365
Wages and benefits	35,373	113,223
	<u>64,100</u>	<u>198,094</u>
<b>Excess of expenditures over revenue for the year</b>	<b>\$ (4,549)</b>	<b>\$ (31,153)</b>

**Kelowna and District Society for Community Living**  
**Pre-Vocational Services Divisions**  
**Bicycle Shop Revenue and Expenditures - Schedule 6**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Provincial government contracts	\$ 135,856	\$ 133,258
Sales	235,273	188,438
Interest income	-	13
	<b>371,129</b>	<b>321,709</b>
<b>Expenditures</b>		
Administration	11,250	11,327
Amortization	2,007	2,781
Automotive	1,910	2,212
Client education, recreation and transporation	859	1,502
Client incentive allowance	4,752	5,306
Cost of goods sold	174,806	135,952
Equipment rentals	-	86
Insurance	676	739
Interest	757	568
Office and miscellaneous	11,144	10,065
Rent	34,283	30,665
Repairs and maintenance	4,027	7,206
Society expense	494	621
Staff development	3,526	3,139
Supplies	7,106	3,497
Technology enhancement	2,351	-
Utilities and telephone	8,568	6,041
Wages and benefits	136,963	126,344
	<b>405,479</b>	<b>348,051</b>
<b>Excess of expenditures over revenue for the year</b>	<b>\$ (34,350)</b>	<b>\$ (26,342)</b>

**Kelowna and District Society for Community Living**  
**Community Services Division**  
**Integrated Career Opportunity Revenue and Expenditures - Schedule 7**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Provincial government contracts	\$ 379,549	\$ 380,525
Sales	115,708	103,140
	<u>495,257</u>	<u>483,665</u>
<b>Expenditures</b>		
Administration	32,958	32,345
Amortization	8,929	6,908
Automotive	22,595	17,067
Client education, recreation and transporation	1,844	1,763
Client incentive allowance	390	1,546
Cost of goods sold	2,840	7,450
Equipment rentals	-	96
Office and miscellaneous	2,920	3,971
Rent	18,000	18,000
Repairs and maintenance	4,146	2,002
Society expense	1,657	1,696
Staff development	4,481	5,355
Supplies	2,368	1,486
Technology enhancement	6,759	-
Utilities and telephone	2,301	2,245
Wages and benefits	303,893	315,232
	<u>416,081</u>	<u>417,162</u>
<b>Excess of revenues over expenditures for the year</b>	<b>\$ 79,176</b>	<b>\$ 66,503</b>

**Kelowna and District Society for Community Living**  
**Administrative Services Division**  
**Individual Funding Revenue and Expenditures - Schedule 8**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Individual funding	\$ 99,221	\$ 122,939
<b>Expenditures</b>		
Administration	4,370	3,090
Automotive	4,532	4,988
Wages and benefits	86,199	114,861
	<u>95,101</u>	<u>122,939</u>
<b>Excess of revenues over expenditures for the year</b>	<b>\$ 4,120</b>	<b>\$ -</b>



**Kelowna and District Society for Community Living**  
**Community Services Division**  
**Rental Assistance Program Revenue, Expenditures and Deficit - Schedule 9**

<b>March 31</b>	<b>2007</b>	<b>2006</b>
<b>Revenue</b>		
Government housing grant	\$ 71,678	\$ 58,884
Client rent contribution	<u>45,665</u>	<u>44,205</u>
	<b>117,343</b>	<b>103,089</b>
<b>Expenditures</b>		
Administration	-	1,381
Professional fees	1,396	1,396
Rent	<u>113,308</u>	<u>109,168</u>
	<b>114,704</b>	<b>111,945</b>
<b>Excess (deficiency) of revenue over expenditures for the year</b>	<b>2,639</b>	<b>(8,856)</b>
<b>Deficit, beginning of year</b>	<b>(18,633)</b>	<b>(9,777)</b>
<b>Deficit, end of year (Note 7)</b>	<b>\$ (15,994)</b>	<b>\$ (18,633)</b>

# *Self-Advocate's Report*

# **SELF- ADVOCATE CAUCUS REPORT**

**2006 - 2007**

The Kelowna self-advocates had there regular meetings on the third Tuesday of each month.

The group held a variety of fund raising activities during the year including hot lunches, a Christmas tree sale in December, followed by the yearly auction at the Christmas party. We also made doves with Darlene Hass and had a garage sale with CLBC. We raised the money to attend the BCACL federation conference in Prince George.

Seven self advocates attended the BCACL AGM and Conference in June. The group produced a video called "Rights and Responsibilities" which was presented at the Conference. They had several requests for copies from community agencies throughout the province.

Self advocates assisted Darryl Harand to review the KDSCL policies, procedures and forms to make sure they were in plain language. We made a lot of changes.

As a group we believe in working together. The self advocates chose to join with other self advocates and at the invite of TIER Support Services, agreed to hold joint meeting to occur at KDSCL or TIER. Working towards a common ground as one group made sense.

The self advocates performed in an interactive workshop with Michael Douglas and produced and presented a skit called "My Life, My Rights". The skit showed what their rights were, how to recognize when rights are being violated and know what to say or do when people don't respect those rights.

Darryl continues to attend the access awareness meeting at city hall and the Kelowna Access Care meetings at Advocate. Darryl was also elected to the CLBC Provincial Advisory Board. Kelly Tompkins was elected to the Okanagan Community Living Council. Leanne Froese continues to represent the Okanagan region on the BCACL Self advocacy Caucus.

Respectfully submitted by Mindy Tompkins, Kelly Tompkins, Darryl Harand, Miki Hanna and Mark Wengrowich

*Service*

*Reports*

*Service*

*Reports*

## **DAY SERVICE**

**2006 - 2007**

The KDSCL Day Service continued to change and evolve along with the varied number of goal requests. The number of individuals we supported increased. On average there were eighty-three (83) individuals attending and we continue to receive new referrals all the time.

The house at 925 Sutherland had some improvements, which included putting in laminate flooring and upgrades to the front and back gardens. The individuals had the opportunity to register for daily activities, but were also able to have a quieter and slower paced environment to meet their needs.

We implemented an activity registration form, which proved to be well liked by everyone. It provided a greater opportunity for choices and was time limited therefore new choices could be made with each new session. Our expansion included multi-sports, painting class, craft classes, drama, scrapbook classes, photography, bird watching, kite flying, canoeing, kayaking, community gardens, bocce and bowling. We continued to offer the usual popular activities of swimming, library visits, day trips, Farmer's Market visits, cooking, baking, Thursday class and bingo. The painting and scrapbook classes gave individuals the opportunity to explore their creative side and we had some wonderful finished paintings and books to illustrate this creativity. The drama class worked on a new skit each week and presented it during karaoke, with staff and individuals participating together. The music classes continued to be popular. The group researched a variety of music, including classical, instrumental, rock and popular with the use of library books. They then listened to the corresponding CDs or watch the music videos. Kudos to the staff that assisted in the development and success of the new classes.

We had a number of participants who took advantage of a basic signing class held at KDSCL for six (6) weeks. Staff and service recipients were invited to attend. The course was a great success.

Our volunteer placements were very popular and our individuals were appreciated wherever they assisted. We volunteered at Stillwaters, Windsor Manor, SPCA, Friendship Centre, Pine acres, Compassionate Canada and The Food Bank. We had a total of four thousand three hundred and forty six (4346) hours and thirty-two (32) recipients who volunteered over the past year. Our volunteers are dedicated and are eager to continue volunteering. We are always on the hunt for more volunteer positions within the community.

The evening weekend – leisure and recreational service explored many new venues. Over the past year two thousand six hundred and thirty one hours (2631) were supported by staff. There were sixty-six (66) different activities with a total of forty-five (45) participants. The variety of events and activities included: hockey games, concerts

at the Creekside theatre, boat trips, go carting, tubing at Silver Star and a long weekend trip to Vancouver.

Last September Camp Owaissi celebrated its' seventh (7) year. Over the years it has provided the opportunity to experience the fun of camping, enjoyed campfires, sing -a - longs, water activities and spent social time with friends. We had groups go out daily from KDSCL to participate and join up with friends.

Respectfully submitted by Susan Harney, Activity Supervisor

## **INTEGRATED CAREER OPPORTUNITIES ( ICO )**

**2006 - 2007**

On average ICO provided services to fifty-four (54) individuals; forty-one (41) of whom were involved in some type of employment. The number served is lower than in previous years due to more effective and efficient fading, retention and follow up procedures.

ICO continued to develop contracts with businesses in the community. We re-wrote all of the contracts into a standard format and negotiated increases on most of them. The recycling contracts with the University of British Columbia, Okanagan were expanded considerably with the addition of the Residence buildings as well as the opening of new class room sections in September. This group work contract provided steady part time employment for five people and has potential of adding increased hours for the current employees and for the addition of another employee. The recycling contract at Okanagan College also saw an increase in volume. It employed five individuals in part time positions. These positions were tailored to fit the lifestyle choices and the capabilities of the individuals employed. ICO renewed its contract for recycling at the Interior Cancer Clinic and it continued to provide recycling services to a number of small businesses in the Community. ICO also continued with the Community Bottle Recovery service which is steadily growing. We had to schedule two full days a week employing three workers just to keep up.

ICO did not renew its contract with Regional District for the Illegal Dumpsite cleanups and it has reduced the number of the Yard Work contracts. The reason for this was that many of the individuals who worked on these projects gained enough work experience to find other employment in the community and we did not have the same number of individuals interested in doing this type of work. ICO did retain a core group of customers to run a steady yard crew. This service emphasized works skill training in yard work equipment and landscaping. It employed up to seven workers in part time seasonal employment. ICO also retained its two janitorial contracts which provided work for up to four individuals, some of whom moved on to other areas of work. Because of the success of this contractual work ICO was able to give an increase in the hourly wage to all of its service recipient employees.

This year saw a strong demand from all types of businesses for workers in Kelowna. ICO responded to this demand by putting a renewed emphasis on person centered planning for employment. This process placed more attention on what an individual wants to do for employment and it includes them in all the stages involved in finding employment. Individuals were assisted in conducting their own job search; they were supported in the interviews; and they were given job coaching for their introductory days on the worksite. Through this process ICO assisted more individuals in finding their own jobs in the community. Grocery stores, restaurants, a brew pub, department stores, a construction site, and a manufacturing plant are just some examples of jobs that service recipients found this year.



ICO continued to run a Pre Employment class as well as a Driver's Education class. The pre employment class helped people prepare for the first steps toward employment, focusing on punctuality, attendance, attitude, participation, comprehension, motivation and communication. It concluded with fully developed resumes. The Driver's Education class taught the knowledge needed to write and successfully pass the learner's test given by BCIC. Support for writing the actual test was also provided upon request. One person obtained their license.

ICO was in the process of gathering information and developing a format for individuals to follow if they wanted to start their own business; or if a group of individuals wanted to form a co-op. We envisioned this to be a viable source of employment for the future for the individuals that we serve and we planned to continue in this direction in the upcoming year.

Respectfully submitted by Wayne Major, Development Supervisor.

# **RESIDENTIAL SERVICES**

**2006 - 2007**

## **RICHTER STREET**

The Richter Street home continued to be a happy and caring environment for the five (5) individuals who live there. We had the opportunity to celebrate the 20<sup>th</sup> anniversary of the opening of the home on October 14, 2006. The staff and residents went out to the Eldorado for a wonderful lunch and then an open invitation for coffee and dessert with parents, relatives, retired staff and members of the community. It was a great event to commemorate the occasion.

There have been some staff changes however our core staff has remained over the years and know the individuals very well. We are slowly establishing a new schedule and once more we will have consistency in the home.

Everyone spent a week in a cabin at Idabel Lake during the August closure and enjoyed the walks, campfires and sitting on the porch relaxing with their peers. The second week was spent on day trips, visiting and getting to do some of the local things Kelowna has to offer.

The five individuals continued with their weekly routines. They all led busy and active lives during the day as well as evenings and weekends. They attended hockey games, concerts and tubing at Silver Star as well as dinner and movies and bowling.

The society continued to provide support for these individuals to remain in their own home and lead full and active lives, involved in their community.

## **INDIVIDUALIZED SERVICE**

KDSCL continued to provide Individualized services to 3 individuals and their families. During the year one family relocated to another region of the province which decreased contracts to two. Individualized service is determined by the individual and/or their family. As the individual is the funder, they define what their support needs are and how their needs will be met. They have input into the hiring and evaluating of their staff.

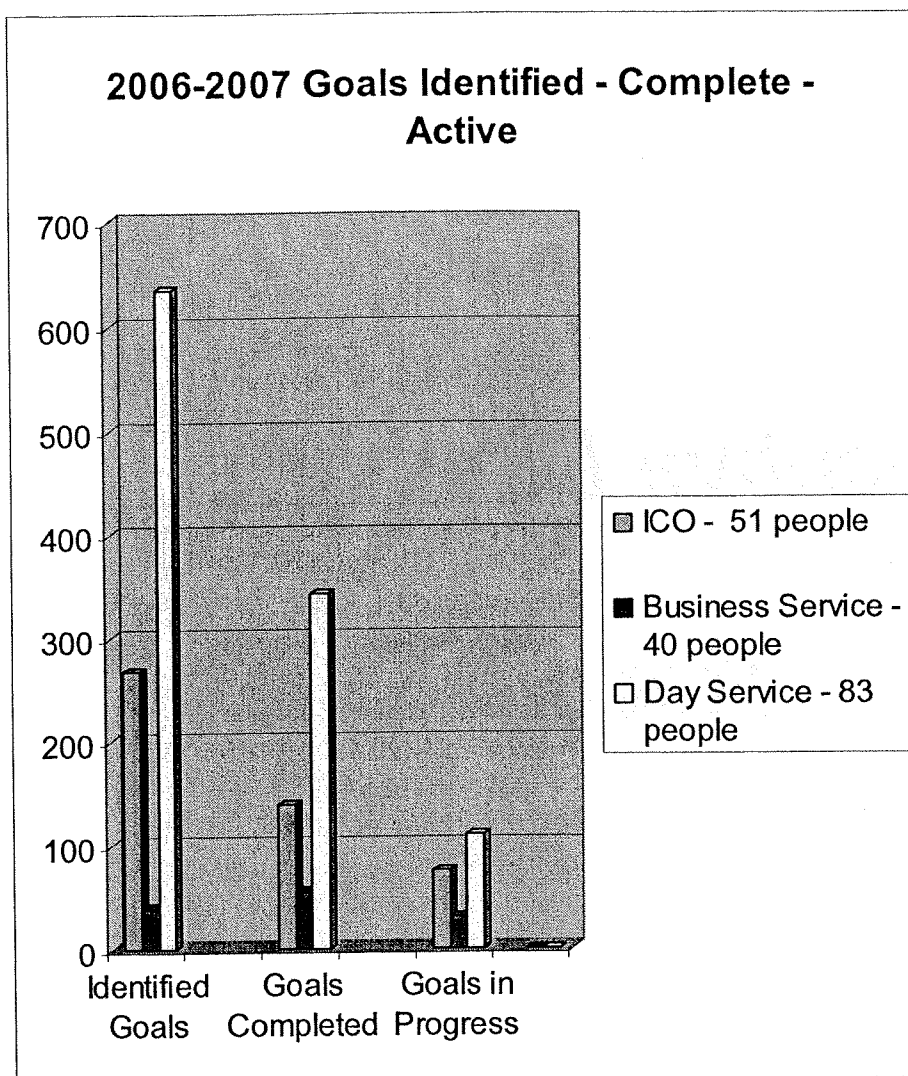
With the changes that have occurred within Community Living BC our Society has fielded a number of inquiries into more personalized supports from individuals and their families as well as Interior Health. Families are directed to explore the support services in the community and have toured our facilities and received information about the services we provide. As a result we look forward to providing a wider variety of services to individuals and their families in the up coming year.

## **APARTMENT SUBSIDY**

KDSCL continues to administer 16 apartment rental subsidies under BC Housing. Funding to this program has not increased in this last year. We do not anticipate changes to this program in the upcoming year and continue to maintain a waitlist of individuals desiring subsidized apartment living.

Respectfully submitted by Susan Harney and Mark Wengrowich

# *Executive Director's Report*



The society worked diligently on addressing the KDSCL outcome measures for 2006-2007 reporting year. Outcomes measurements reflect the diverse desires of individuals and provides for a system of monitoring and measuring successes.

The following outlines our success and serves to identify areas we needed to improve in order to continue to provide quality services.

#### **Richter Residence Outcomes:**

**Outcome Objective** Maximize involvement in personal decision-making and level of independence. Goal: 100%

Results: 5 residents had 5 Individual Service Plans (ISPs) and 4 reviews (100%). Through this process each person had input into their lifestyle choices, home and community participation.

**Outcome Objective:** Individuals experience citizenship through inclusion in their community. Goal: 10 different activities in the community.

Results: On average each person attended 22.6 different community activities.

**Outcome Objective:** Individuals are safe and secure. Goal: Participation in 14 emergency drills.

Results: All individuals participated in fire drills monthly, 2 bomb threat drills and 2 earthquake drills within the year.

**Outcome Objective:** Provide services within annual allocated budget.

Results: Accomplished.

**Outcome Objective:** Maximize satisfaction of all residents served. Goal: 87%

Results: 40% of Richter Street residents responded to the survey (2 of 5 returned). 89% responded Yes to general satisfaction, 11.5% responded Usually, there were 0 responses to No. Of the responses received Usually and Yes were combined to determine a general satisfaction of 99.5%.

**Outcome Objective:** Maximize satisfaction of the person's served families. Goal: 87%

Results: 40% of Richter Street families responded to the survey (2 of 5 returned). 71% responded Yes to general satisfaction, 26% responded Usually, 5% responded No. Of the responses received both Usually and Yes were combined to determine a general satisfaction of 97%.

**Outcome Objective:** Maximize satisfaction of all stakeholders. Goal: 87%

Results: 27% of Funders responded to the survey (3 of 11 returned) 80% responded Yes to general satisfaction, 18% responded Usually, 2% responded No. Usually and Yes were combined to determine a general satisfaction of 98%.

#### **Day Service Outcomes:**

**Outcome Objective** Maximize involvement in personal decision-making and level of independence. Goal: 100%

Results: In the last year 55 ISPs were conducted, 52 reviews and 4 ISPs were declined. All individuals were given the opportunity to have an ISP or ISP review (100%).

**Outcome Objective:** Maximize opportunities for persons to participate in social recreation and leisure activities and experience citizenship through inclusion in their communities. Goal: 5 activities per person.

Results: 72 people chose to participate in a variety of community based activities. Of more than 100 activities offered individuals participated in 14 activities on average.

**Outcome Objective:** Maximize opportunities for persons to participate in evening and weekend activities. Goal: 10 different individuals to participate in 24 different activities.

Results: The Recreation and Leisure service provided a total of 66 activity opportunities to 45 individuals who chose to participate. Each person participated in an average of 9 activities. Each of these 45 individuals spent on average 58.5 hours participating in community based activities.

**Outcome Objective:** Maximize opportunities for persons to participate in community volunteerism. Goal: 95%.

Results: 17 individuals requested volunteer placements and all 17 were placed (100%).

**Outcome Objective:** Maximize opportunities for persons to participate in life skill development. Goal: 90%

Results: 59% (33 of 56) of life skill goals were completed. The remaining 41% are active.

**Outcome Objective:** Minimize the time existing and new service recipients wait to access service. Goal: 40 days.

Results: Of the 12 new referrals 6 people began service at an average of 59 days from request to entrance. Factors included individuals having applied for services prior to completing their school year and not completing the intake process. 8 Individuals

requesting an increase or transfer of service and it took an average 25 days to complete.

**Outcome Objective:** Provide services within annual allocated budget.

Results: Accomplished.

**Outcome Objective:** Maximize satisfaction of all persons served. Goal: 87%.

Results: 26% of Day Service recipients responded to the survey (28 of 88 returned). 69% responded Yes to general satisfaction, 10.2% responded Usually, 45% responded No and 17% gave no answer. Both Usually and Yes have been combined to determine a general satisfaction of 79%.

**Outcome Objective:** Maximize satisfaction of the person's served families. Goal: 87%.

Results: 26% of Families and Caregivers responded to the survey (28 of 88 returned). 62% responded Yes to general satisfaction, 18% responded Usually and 9% responded No. Both Usually and Yes have been combined to determine general satisfaction of 78%.

**Outcome Objective:** Maximize satisfaction of all stakeholders. Goal: 87%.

Results: 27% of Funders responded to the survey (3 of 11 returned) 80% responded Yes to general satisfaction, 18% responded Usually and 2% responded No. Usually and Yes were combined to determine a general satisfaction of 98%.

### **Business Services (Larry's Cycle and Sports and the KDI Wood Shop):**

**Outcome Objective:** Maximize involvement in personal decision-making and level of independence. Goal: 100%

Results: At Larry's there were 12 ISPs, 8 reviews and 3 declined. At the KDI Wood shop there were 11 ISPs, 9 reviews and 1 declined. All individuals were given the opportunity to have an ISP or ISP review (100%).

**Outcome Objective:** Maximize number of persons in training to move on to supported community employment. Goal: 90%.

Results: There were no individuals who requested training in order to move on to supported community employment.

**Outcome Objective:** Maximize opportunities for persons to participate in social recreation and leisure activities and experience citizenship through inclusion in their communities. Goal: 100%.

Results: Of the 40 individuals involved in business services that requested activity participation, 13 participated in 5 or more community activities, 16 participated in between 1 and 5 activities and 11 chose not to participate in any community activities.

**Outcome Objective:** Minimize the time existing and new service recipients wait to access service. Goal: 40 days.

Results: 3 new external referrals were made to business services. 2 individuals took an average of 131 days to enter service; both were required to finish school prior to commencing services with KDSCL. One individual did not complete the intake process. 9 individuals requested an increase of service or internal transfer and it took an average 46 days for service change to occur, 1 of these individuals required one-to-one supervision and it took 257 days.

**Outcome Objective:** Provide service within an annual allocated budget.

Results: Accomplished for the KDI Wood Shop not for Larry's Cycle and Sports.

**Outcome Objective:** Maximize satisfaction of all persons served. Goal: 87%.

Results: 26.3% of individuals responded to the KDI Wood shop survey (5 of 19 returned). 71% responded Yes to general satisfaction, 3% responded Usually, 2% responded No and 25% gave no answer. 24% of individuals responded to the Larry's

Cycle and Sport survey (4 of 17 returned). 92% responded Yes to general satisfaction, 6% responded Usually and 2% responded No. Both Yes and Usually have been combined to determine a general satisfaction of 86%.

**Outcome Objective:** Maximize satisfaction of the person's served families. Goal: 87%.  
Results: 21% of Families and Caregivers responded to the KDI Wood shop survey (14 of 19). 91% responded Yes to general satisfaction and 9% responded Usually. 21% of Families and Caregivers responded to the Larry's Cycle and Sport survey (4 of 17 returned). 90% responded Yes to general satisfaction, 3% responded Usually and 5.5% responded No. Both Usually and Yes have been combined to determine general satisfaction. Family's satisfaction in business services is 96.5%.

**Outcome Objective:** Maximize satisfaction of all stakeholders. Goal: 87%.  
Results: 43% of Customers responded to the Business surveys (24 of 56). 74% responded Yes to general satisfaction, 5% responded Usually and 6% responded No and 5% gave no answer. Both Usually and Yes have been combined to determine general satisfaction of 79%. 27% of Funders responded to the survey (3 of 11 returned) 80% responded Yes to general satisfaction, 18% responded Usually, and 2% responded No. Usually and Yes were combined to determine a general satisfaction. 98% were satisfied with services. Customers and Funders overall satisfaction 88.5%. Business Service and ICO Customers and Funders combined.

#### **Integrated Community Opportunities (ICO) Outcomes:**

**Outcome Objective:** Maximize involvement in personal decision-making and level of independence. Goal: 100%

Results: in the last year there were 34 ISPs, 30 reviews and 6 declined. All individuals were given the opportunity to have an ISP or ISP review (100%).

**Outcome Objective:** Maximize number of persons in training to move on to supported community employment. Goal: 90%.

Results: There were no individuals who requested training that would have lead to community employment. Training goals were First Aid, serve it right and driver's education.

**Outcome Objective:** Minimize response time to requests for employment and minimize the time existing and new service recipients wait to access service. Goal: 40 days.

Results: 5 new referrals waited an average of 87 days to enter employment services. 2 individuals were required to finish school prior to commencing services with KDSCL, 4 individuals did not complete the intake process. 2 individuals who requested increased employment services waited 5.5 days.

**Outcome Objective:** Minimize wait time for service recipients to attend job readiness class. Goal: 30 working days.

Results: 13 individuals completed job readiness class. 2 individuals retok the class. Job readiness classes ran at scheduled times throughout the year and no person was required to wait to enter a job readiness class.

**Outcome Objective:** Provide service within an annual allocated budget.

Results: Accomplished.

**Outcome Objective:** Maximize satisfaction of all persons served. Goal: 87%.

Results: 22.6% of ICO service recipients responded to the survey (12 of 53 returned). 74% responded Yes to general satisfaction, 8% responded Usually, 5% responded No and 14% gave no answer. Both Usually and Yes were combined to determine a general satisfaction of 82%.

**Outcome Objective:** Maximize satisfaction of the person's served families. Goal: 87%. Results: 19% of ICO Families and caregivers responded to the survey (10 of 53). 75.5% responded Yes to general satisfaction, 22% responded Usually and 3% responded No. Both Usually and Yes have been combined to determine general satisfaction of 97.5%.

**Outcome Objective:** Maximize satisfaction of all stakeholders. Goal: 87%. Results: 43% of Customers responded to the Business surveys (24 of 56). 74% responded Yes to general satisfaction, 5% responded Usually and 6% responded No and 5% gave no answer. Both Usually and Yes have been combined to determine general satisfaction of 79%. 27% of Funders responded to the survey (3 of 11 returned) 80% responded Yes to general satisfaction, 18% responded Usually, and 2% responded No. Usually and Yes were combined to determine a general satisfaction. 98% were satisfied with services. Customers and Funders overall satisfaction 88.5%. Business Service and ICO Customers and Funders combined.

## Survey Results

### FAMILY SURVEY - July 2007

38% of Families and Caregivers responded to the survey (61 of 160 returned) all areas have been combined.

#### (A) DO YOU FEEL THAT THE PERSON RECEIVING SERVICE HAS THE OPPORTUNITY TO:

1. Make his/her own choices at KDSCL.
2. Receive prompt, responsive services.
3. Choose hours of service.
4. Advance to the level of independence that they are seeking.
5. Achieve individual goals.
6. Establishes friendships.

	No	Usually	Yes	No Answer
1. Make his/her own choices at KDSCL.	2	18	35	6
2. Receive prompt, responsive services.	0	18	41	7
3. Choose hours of service.	9	11	28	13
4. Advance to the level of independence that they are seeking.	6	6	35	14
5. Achieve individual goals.	5	11	33	10
6. Establishes friendships.	5	10	40	9
Total	27	74	212	59
Percentage	8%	21%	59%	16%

#### (B) DO OUR SERVICES OFFER:

7. Respect and dignity.
8. Enhanced lifestyle/quality of life & self-esteem
9. Steady hours of service.
10. A secure and safe environment.
11. Positive experiences

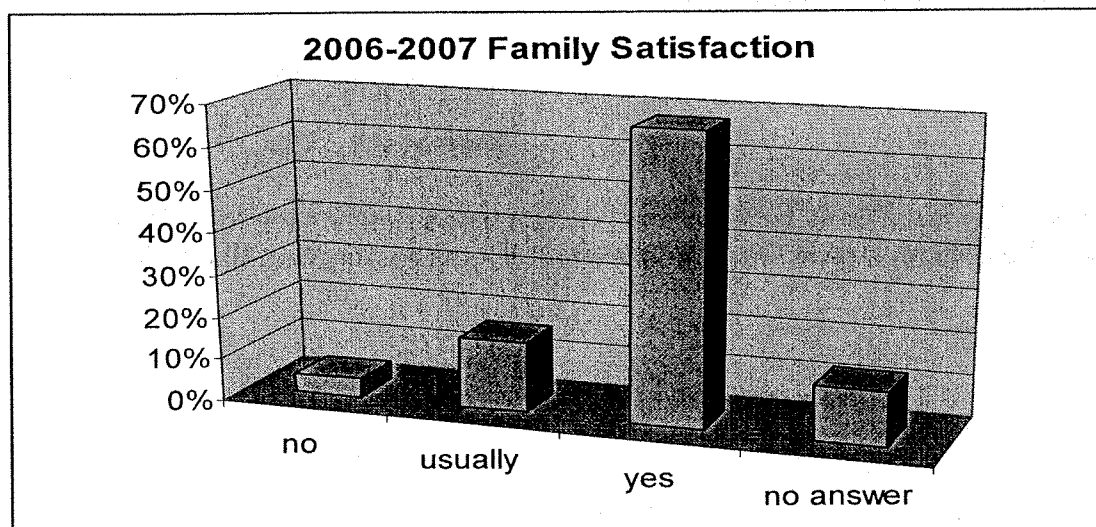
	No	Usually	Yes	No Answer
7. Respect and dignity.		4	52	6
8. Enhanced lifestyle/quality of life & self-esteem		9	48	6
9. Steady hours of service.	1	4	50	7
10. A secure and safe environment.	1	5	48	7
11. Positive experiences		5	49	8



	No	Usually	Yes	No Answer
12. Competent & knowledgeable support workers		6	45	9
13. Flexibility within services.	3	10	41	8
14. Meaningful, productive services.	3	9	41	9
Total	8	52	374	60
Percentage	2%	11%	77%	12%

	No	Usually	Yes	No Answer
<b>(C) ARE YOU:</b>				
15. Happy with our quality of services.		11	43	6
16. Being kept informed of options and services.	3	12	40	5
17. Receiving regular communication from KDSCL	2	12	40	6
18. Able to understand the agency purpose.	1	10	41	7
19. Satisfied with individual's accomplishments.	2	10	42	7
Total	8	55	206	31
Percentage	3%	18%	68%	10%

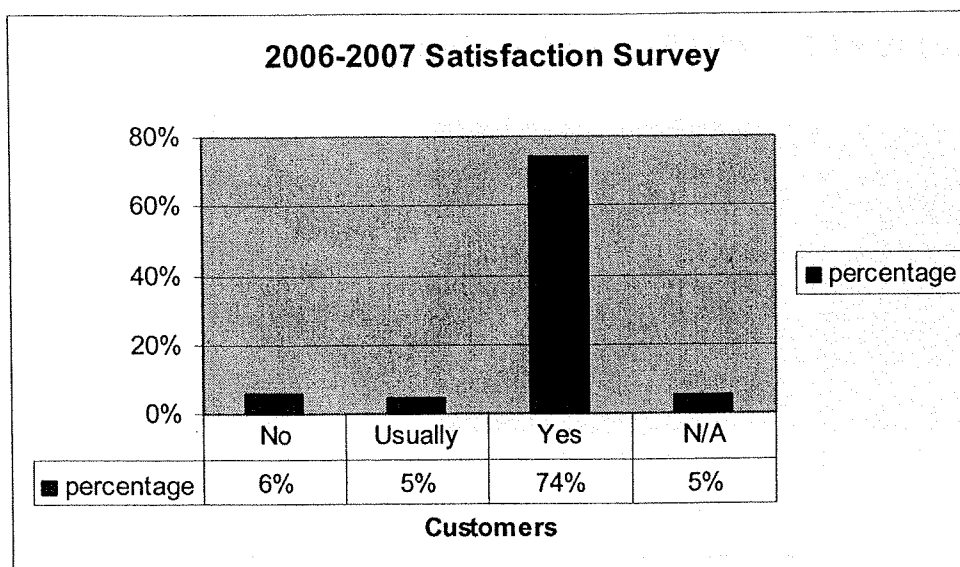
Surveys were received between May and June of 2007.



## KDSCL CUSTOMER SURVEY 2007

	Questions	No	Usually	Yes	N/A
1	Are you satisfied with KDSCL's services overall?	0	0	22	0
2	Is KDSCL staff responsive (return phone calls, etc.)?	0	0	22	0
3	Do KDSCL staff treat you with respect and consideration?	0	0	22	0
4	Do KDSCL staff keep you up to date with changes?	0	4	13	4
5	Do staff respond to your questions and concerns?	0	0	21	1
6	Do our hours of service meet your needs?	0	3	19	0
7	Do we provide quality product or service?	0	2	19	0
8	Do we have enough product or supply available when needed?	0	6	14	2
9	Do KDSCL staff treat individuals with disabilities with respect?	0	0	22	1
10	Do KDSCL staff assist individuals with disabilities to meet your service needs?	0	0	21	3
11	Is KDSCL's billing system satisfactory?	1	0	16	4
12	Are we flexible	1	1	16	2
13	Are there barriers that prevent you from accessing KDSCL	16	0	3	1
14	Do you understand the agency purpose?	1	0	20	0
Total		19	16	250	18
Percentage		6%	5%	74%	5%

Note: question 13 asked about barriers that prevent those businesses from accessing the society. The answer is given in a negative and alters the graph somewhat.

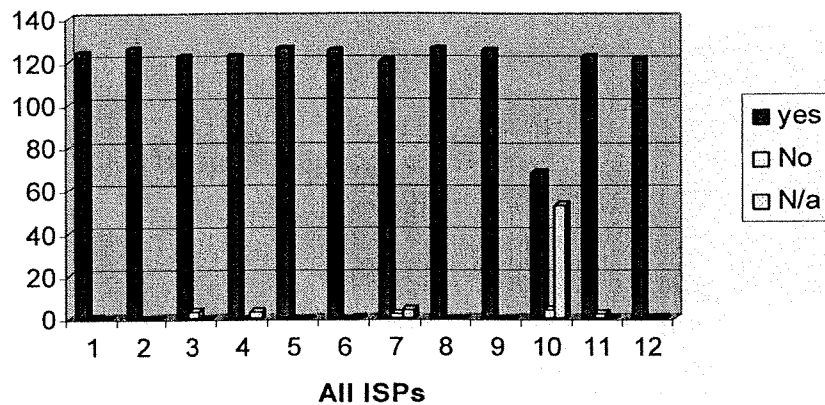


### ISP CHECKLIST SURVEY

126 Individual Service Plan checklists were returned. The following were the responses to the questions asked in the checklist.

- 1 The individual (or family, friend, or advocate if needed) chose who would be at the meeting **Yes: 92.54% No: .75% N/A: 0%**
- 2 The individual was at the meeting **Yes: 94.03% No 0% N/A 0%**
- 3 The individual was a part of the team and the focus of their work. **Yes 91.04% No 2.24% N/A 0%**
- 4 The individual (or family, friend or advocate) was asked first to share, and then others were asked to share information. **Yes 91.04% No 0% N/A 2.24%**
- 5 The Team talked about the individual's preferences and strengths. **Yes 94.03% No 0% N/A 0%**
- 6 The team talked about the individual's hopes and dreams for the future. **Yes 93.28% No 0% N/A .75%**
- 7 The team talked about barriers to the individual's preferred lifestyle (e.g. living, working relationships) for both now and the future. **Yes 89.55% No 1.49% N/A 0%**
- 8 The meeting was positive. **Yes 94% No 0% N/A 0%**
- 9 The meeting was supported by an effective facilitator who made sure that everyone had an opportunity to share in a non-judgmental atmosphere. **Yes 93% No 0% N/A 0%**
- 10 If the individual could not talk or communicate for him or herself, was there someone there to communicate for him or her? **Yes 51% No 3% N/A 40%**
- 11 The team talked about how to make sure the support services plan would reflect the individual's preferences, strengths, hopes and dreams. **Yes 91% No 1.5% N/A 1%**
- 12 The team committed to work together to carry out the plan and to meet again to talk about their progress. **Yes 90% No 1% N/A 1%**

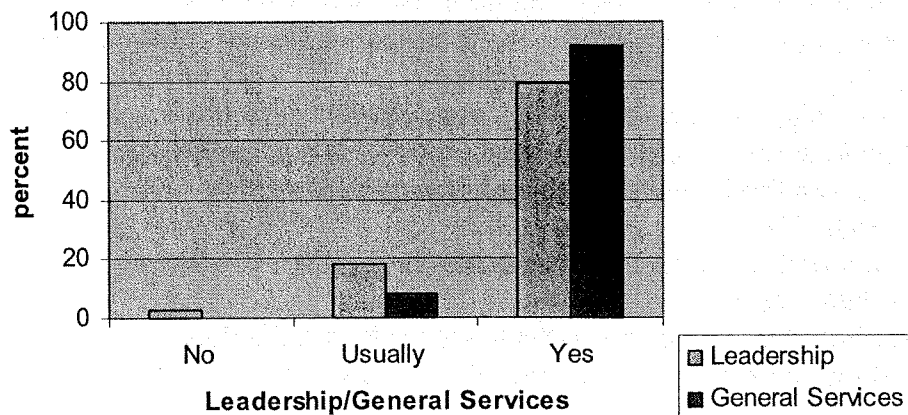
### 2006-2007 ISP Checklist Survey Responses



### FUNDER SURVEY

11 Surveys were sent to Funders. 3 were returned. Usually and Yes were combined to establish a general satisfaction of 92%

### 2006-2007 Funder Satisfaction Survey



### General Services

	No	Usually	Yes
1. Are you satisfied with KDSCL's services overall?		1	2
2. Is KDSCL staff responsive (return phone calls, etc.)?		1	2
Do KDSCL staff treat you and/or your staff with respect and consideration?			3
4. Do KDSCL staff keep you up to date with changes?	1	1	1

	No	Usually	Yes
5. Do KDSCL staff respond to your questions and concerns?			
6. Do our hours of service meet your needs?			3
7. Do KDSCL staff work to better the lives of people with developmental disabilities?			3
8. Do KDSCL staff treat individuals with respect?		1	2
9. Do KDSCL services promote and support community inclusion and participation?		1	2
10. Are you satisfied with the support the individuals you represent receive?			3
11. Are we flexible?		1	2
<b>Total</b>	<b>1</b>	<b>6</b>	<b>26</b>
<b>Percentage</b>	<b>3%</b>	<b>18%</b>	<b>79%</b>

### Leadership

	Never	Usually	Yes
1. Are you satisfied with KDSCL's leadership overall?			3
2. Are you satisfied with the leadership displayed by the executive director?			3
3. Are you satisfied with the leadership displayed by the managers?		1	2
4. Are you satisfied with the leadership displayed by the supervisors?			3
<b>Total</b>	<b>0</b>	<b>1</b>	<b>11</b>
<b>Percentage</b>	<b>0%</b>	<b>8%</b>	<b>92%</b>

### Volunteer Hours

We continue to provide volunteer services to our community. In the past year we focused on the goals of individuals who stated that they wanted to volunteer. Placements were as follows: Interior Health, Sutherland Hills, Windsor Manor, S.P.C.A., Compassionate Canada, Pine Acres, Ki-Lo-Na Friendship, Food Bank, West Bank Museum, Village Creekside and Chances Gaming. Individuals also volunteered for various community events. This year we discontinued service to the Kelowna Women's Shelter and the Salvation Army. There were no individuals requesting these sites.

42 volunteers spent 4601 hours volunteering in community.

# KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

## 1953 - 2006

**June 10, 1953:** A group of parents, teachers, doctors and concerned citizens met because children with mental handicaps were not being educated in their community. On June 18, 1953 the founding members named the organization the Kelowna and District Society for the Mentally Handicapped. The "centre" opened December 7, 1953.

**1954:** The society name changed to the Kelowna and District Society for Mentally Retarded Children and the centre was officially called Sunnyvale.

**1958:** The Sunnyvale Centre had an enrollment of thirteen students and a staff of two teachers. They taught classes of seven to thirteen year olds and fifteen to thirty year olds.

**1968:** The Sunnyvale Workshop was developed and served 27 adults supported by 6 staff. The school enrollment was 18 students supported by 3 teachers.

**1970:** The name changed to the Kelowna and District Society for the Mentally Retarded. There were four main departments operating: Commercial, Special services (Wedding car decorations and crafts), Woodworking and Ceramics. Recreational activities such as bowling, skating, parent sponsored picnics and field trips were offered. Towards the end of the year, the pre-school program started and soon moved to the Baptist Church on Bernard Avenue.

**1971:** September, an extension was built onto Sunnyvale, which added two more classrooms.

**1973:** The Bertram Street Residence opened with 12 residents living there. The children's education programs were given to School District #23.

**1975:** July, the expansion of Sunnyvale Workshop was completed and those on a waiting list finally received services.

**1976:** The Infant Development Program started.

**1977:** A Recreation and Field Counselor was hired to expand activities within the community.

**1981:** The society changed names back to the Kelowna and District Society for the Mentally Handicapped and the Sunnyvale Workshop became Kelowna Diversified Industries (KDI) Wood Shop.

**1983:** The society transferred the Infant Development program to the Child Development Centre. Bertram Street Residence closed with some residents moving home and others went into the Independent Apartment Living Program.

**1984:** Early in the year, the Bach Road group home opened and 4 people moved in. The Bertram Street Residence opened as a pre-vocational activity centre. Discussion groups, personal grooming, work preparation, arts and crafts and access to community-based programs were offered.

**1985:** Two homes were purchased, Solly Court and Lakeland and former residents of institutions in BC moved into the community-based homes. Bertram Street expanded its' services to provide day programming for these individuals. The society assisted in setting up the Special Olympics program in Kelowna.

**1986:** The Bach Road residents moved to a newly purchased home on Richter Street, which is still owned and operated by the society.

**1988:** The 35<sup>th</sup> anniversary of the society was held. The society was now running four levels of programming ranging from personal skills to vocational training. The day

program served 68 people supported by 16 staff. The residential program served 24 individuals supported by 19 staff.

**1989:** Lakeland residence was sold and a duplex on Elm Street purchased. Wedding Belles and Baskets moved to a storefront operation on Sutherland Avenue with 11 individuals and two staff. The society's offices moved out of the McWilliams Centre and into Bertram Street Vocational Centre (KDI).

**1990:** The society name changed again to the Kelowna and District Society for Community Living. Integrated Career Opportunities (ICO), a supported employment service was formed. The society started an integrated daycare.

**1991:** Solly Court was sold and the contracts transferred to the new owner.

**1992:** The Self-Advocacy group started to grow and expand. The arts program would be converted to a production contract. The newly formed Travel Club made its' second trip – a cruise down the Mexican coast.

**1993:** Elm Street was in the process of closing which left the society with one group home, Richter Street. ICO opened a second office in Winfield.

**1994:** The society purchased a new recycling truck for ICO to assist the recycling program to expand. They secured a contract with the Kelowna General Hospital. Plans for a bicycle shop were initiated and involved handling the city's lost and stolen bikes.

**1995:** The society established another 'storefront' operation when contract services moved to Bay Avenue and became First Choice. 12-18 individuals worked there with two staff. Contracts included packaging and labeling for Sun-Rype and Calona Wines as well as bulk mail-outs, newsletters and collating projects for their regular customers. The Bike Shop opened at KDI and a showroom for sales and repairs started. The Bike Shop was named Larry's in memory of a former service recipient. The Daycare was closed due to the decline in children enrolled. The Bertram Street building was purchased by the society from the city so that it could be sold. The Winfield office closed due to the decline in participation.

**1998:** The Bike Shop signed a contract with Zellers to assemble their new bikes and was working on signing deals with Wal-Mart and Canadian Tire.

**1999:** The administration offices moved to KDI and the Bike Shop was in the process of opening a store on Doyle Avenue. October was designated Community Living Month. At the end of the year, the Legion purchased the Bertram Street building.

**2000:** A shredding machine was purchased and the search for more work started. The Wedding Shop moved to Spall Road and ICO moved to Kent Road. In the fall, a new 14-foot cube van was purchased for Econoshred.

**2001:** The Wood Shop received a forklift, which helped a great deal with their lift lots of wood. First Choice gave up the storefront on Bay Avenue and moved back to KDI in December.

**2002:** The Wood Shop started making cedar sheds. March 1, the Bike Shop moved to a new location on Lawrence Avenue. The Bike Shop named was changed to Larry's Cycle and Sports. The Minister for Children and Family Development appointed a provincial Transition Steering Committee to make recommendations on transferring community living services from government to a new community based governance authority.

**2003:** KDSCL celebrated 50 years of community service. Celebrations occurred throughout the year beginning in April. The society donated a tree, which was planted in City Park to thank the community for their support and KDSCL hosted a Chamber of Commerce new members breakfast. In June, a "50th Anniversary Party in the Park" occurred at Mission Creek Park. The entire community was invited to come and participate in the celebration. In October, in recognition of community living month, a

reunion dance was held at the Performance Centre on Ellis Street. ICO's offices relocated to KDI. Individualized funding became an option for individuals and families. Government was moving away from traditional global funded contracts. Wedding Belles and Baskets moved to a new location on Lawrence Avenue, next to Larry's Cycle and Sports. The society underwent a major service review. The three supervisor positions were consolidated into 2. Action plans were established to clearly define the service areas and establish clear goals for each service. The society offered 4 types of services; business services, day service, residential and ICO. Ricky Barton a service recipient, passed away.

**2004:** KDSCL began preparing for accreditation. ICO focused solely on employment and the Day Service assumed responsibility for assisting individuals with life skills. Community Placement Developer positions were established to create more opportunities for community participation in employment and volunteer work. An agency shuffle occurred and staff were reassigned to their preferred areas of work. Incentive pay was clarified and a new system implemented. Another truck was purchased. The society secured an individualized funding contract and assisted a family to support their two adult children in their home. The Interim Authority for Community Living BC was established to assume provincial responsibility for services to people with disabilities from the Ministry for Children and Family Development. The building continued to be utilized by outside not-for-profit groups including Parent-to-Parent, the Cool Arts Group, the Okanagan Deaf Association and self Advocate Caucus. The Board of Directors and executive director continued to work on replacing the building located at 555 Fuller Avenue.

**2005:** KDSCL had their first Commission on Accreditation of Rehabilitation Facilities (CARF) accreditation site survey November 2 to 4, 2005. Three surveyors came from the United States and evaluated KDSCL's services against industry standards. On December 15, 2005 we received notification that we had been assigned a three-year designation. Community Living BC took over the provincial responsibility for services to people with disabilities from the Ministry for Children and Family Development July 1. Community participation at various recreation and leisure activities and events increased in all areas. Service recipients planted and harvested a community garden plot, hiked trails, participated in signing classes, went tubing, attended hockey games, etc. Community volunteerism increase and service recipients volunteered over 2900 hours at Pine Acres Rest Home on the West Side, Windsor Manor in Rutland, Ki-low-na Friendship Center downtown and Compassion Canada. KDSCL assisted with Kelowna Centennial celebrations and Regatta. After 14 years of association with the Kelowna General Hospital and Cottonwoods, 5 individuals from ICO were laid off. Many employees at the hospital were upset and tried to have the individuals reinstated, unfortunately to no avail. Richard Bernard and Patrick Smart passed away.

**2006:** Service contracts with CLBC were renewed for an additional year and a half. CLBC hired a provincial self advocate advisor worked at establishing better communications with people with disabilities. A new provincially bargained 4-year collective agreement was ratified, to create labour stability. Due to a decline in sales and the lack of activity for the attendees, Wedding Belles and Baskets officially closed the doors July 14, 2006. KDSCL purchased a house at 925 Sutherland Avenue which became an extension of the KDSCL day service. The women from the Wedding store moved to this location. At the same time Larry's Cycle and Sports moved to a new location at 123-1511 Sutherland Avenue. Larry's expanded their retail operations and began selling Waldies shoes, Life is Good and Horsefeathers clothing lines. The residents at Richter Street celebrated 20 years together. They also vacationed in



Mexico while the interior of the house was being painted. The KDI Wood Shop was extremely busy with stakes sales increasing due to increased construction in Kelowna. The day service expanded and the services offered were based on individual's needs and pre-scheduling activities. Community volunteerism continued to increase. ICO expanded their contracts and had record sales. A 30 year lease on the 555 Fuller property was finally reached with the City of Kelowna and the society continued to pursue replacing the building. The unofficial KDSCL travel club spent a week at the West Edmonton Mall. A group of KDSCL service recipients went camping the 2<sup>nd</sup> weekend in September to Camp Owaissi across the lake. KDSCL purchased the ShareVision program designed to eliminate paper work through the use of online websites and make the services more effective and efficient. KDSCL held very successful community living month events including BBQs each Friday in October. Many of our community partners, including the mayor, came to KDSCL for a free lunch and received bouquets of flowers. KDSCL was also showcased on CHBC by Mike Roberts. Joan MacGregor, who was the KDSCL executive director from 1989 to 1999 and Anne-Louise Woite, a long term wedding store participant, passed away.

<b>President</b>	<b>Year</b>
Mrs. H. B. Simpson	1953
Mr. R. C. Gore	1953 - 1955
C. J. Knowles	1955
Ivor Jackson	1956 - 1957
Freedra Woodhouse	1957 - 1958
Mrs. H. Burbank	1958 - 1959
Mr. R. C. Gore	1960 - 1961
Mrs. T. C. Williams	1961 - 1962
Ivor Jackson	1963
Mr. R. P. McLennan	1964
Mr. E. H. Cotton	1965 - 1968
Audrey Perley	1968 - 1970
Mrs. G. Ritchie	1970
W. S. Leggat	1970 - 1974
Elise Clark	1974 - 1977
Jim Grindley	1977 - 1980
Walter Brown	1981 - 1982
Gerry Bleiler	1982 - 1983
Frances Nutz	1983 - 1986
Elise Clark	1986 - 1988
Dan Porayko	1988 - 1989
Joanne English/ Calkins	1989 - 1991
Jim Greenlay	1991 - 1993
Nick Pisio	1993 - 1997
David Paynter	1997 - 1999
Dennis Gates	1999 - 2004
Gail Meier	2004 - Present