

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING (KDSCL)

55th ANNUAL REPORT

2007 - 2008

**“CELEBRATING 55 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:

- Has the same rights and freedoms given to all people in our society and therefore is unique and valued.
- Is to be treated equally with dignity and respect.
- Has the right to be informed on all matters that affect his or her life and make their own choices and decisions.
- Has the right to speak for them self (self-advocate) or to choose someone to speak for them.
- Has the right to live, socialize, work and participate in all aspects of community life in the least restrictive environment and should be taught the necessary skills to do so.
- Has the right to individualized service within the scope of what the society can provide.
- Has the right to expect that the society is accountable, advocates when requested or required and positively represents all people.
- Has the right to opportunities that provide life long learning and an enriched life.
- Has the right to a supportive network of personal relationships with family, friends and advocates.
- Is entitled to good health, medical and dental care on a voluntary basis and is to be informed and give consent.
- Is entitled to aides or adaptations (something changed or added) that may be needed for greater independence.
- Is responsible for his/her own actions and therefore is responsible for the consequences.

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KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

MINUTES OF THE 54th ANNUAL GENERAL MEETING

September 17, 2007, 7:00 pm
555 Fuller Avenue, Kelowna, BC

1. The meeting was called to order by President, Gail Meier at 7:00 pm.
2. Gail Meier stated that Robert's Rules Order will be followed.
3. **Moved by Nick Pisio seconded by David Paynter that the agenda be accepted. Carried.**
4. **Moved by David Low seconded by Nick Pisio that the minutes of the September 18, 2006 AGM be approved as circulated. Carried.**
5. Treasurer's/ Auditor's Report: Markus Schrott from BDO Dunwoody reviewed the auditor's report. Markus thanked management for their great work. He stated the audit went very well. He provided a brief overview of the statements. The first page of the report is standard for all charities. The society balance sheet identifies a strong cash position and with the purchase of the property at 925 Sutherland Avenue there was an increase in capital assets with a mortgage liability.
6. Appointment of the 2007/2008 Auditors: **Moved by David Low seconded by David Paynter that the board of directors be given the authority to appoint the auditors for the 2007-2008 fiscal year. Carried**
7. President's Report: Gail Meier stated that the report is included in the AGM booklet. The board had a planning session in November 2006 and much time was spent working on replacing the building at 555 Fuller Avenue. **Moved by Jim Greenlay seconded by Nick Pisio that the President's Report be accepted as presented. Carried.**
8. Self-Advocate's Report: Darryl Harand stated that the self advocates continued to fund raise this year. They held two new fund raisers, a garage sale with CLBC staff and doves with Darlene Hass. They attended the BCACL conference in Prince George and did a workshop on making self advocates strong. They networked with TIER support services and held meetings at KDSCL and TIER. Darryl reviewed the KDSCL policies and procedures to ensure they were in plain language. Darryl thanked the self advocates who gathered donations for the Christmas silent auction and for all their support. **Moved by Kelly Tompkins seconded by Jim Greenlay that the Self Advocate's Report be accepted as presented. Carried.**
9. Election of Officers: David Paynter stated that the terms of four Directors concluded and three have allowed their names to stand for re-election for a two-year term, David Low, Gail Meier and Rick Pushor. David Fidler is not seeking reelection to the board at this time. David Paynter stated that because David Low and Gail Meier have been

elected to the board for five years or three consecutive terms the membership's consent is required in order for them to seek reelection. David Paynter called upon the membership three times requesting nominations from the floor, with no forthcoming
Moved by David Paynter seconded by Jim Greenlay that Gail Meier, David Low and Rick Pushor be appointed to the Board of Directors. Carried.

10. Revised Bylaws: Gail Meier stated that the revised bylaws had been sent to the membership with the AGM packages. Gail asked if there were any questions. David Paynter asked if strikethrough meant elimination of wording and bolded text meant additions. Charisse Daley stated yes. **Moved by Nick Pisio seconded by David Paynter that the revised Bylaws be accepted as presented. Carried.**

11. Moved by Gail Meier that the meeting be adjourned at 7:20 pm. Gail stated that there are refreshments and we would reconvene in a few minutes for guest speaker, Bob Turik.

President's Report

PRESIDENT'S REPORT

2007 – 2008

Well another year has gone by quickly! Another year of serving clients well and conducting society business. As a board we continue to meet on a monthly basis. Noon hour meetings seem to work best for all the members. Email has proven to be a valuable tool for keeping in touch and transacting business that needs immediate attention.

I continue to meet with Charisse in between meeting and am available to sign cheques or confer as needed. The board and the society was saddened by the loss of a long time employee Leigh Edwards. His caring and gentle ways will be missed by all. It was a difficult time for the staff and we tried to support all the best we could.

This year we pressed on in the process of getting a new building. It was a frustrating year but we finally have a building permit and so will continue onto the next phase of the process. The board will be doing a strategic planning session this fall to help move forward.

There were a few changes to the board this year, our long time treasurer David Low, resigned. David has been on the board since 1989 and served the board well overseeing the society's finances and helping Charisse (as well as several preceding executive directors) supervise and support the financial department. Denis Gates, a long term director stepped as interim Treasurer. We were fortunate to recruit a new potential director who is seeking election to the board at the Annual General Meeting in September, Arnold Soloway who has agreed to take the permanent Treasurer position. Arnold comes to the board with experience in several other non-profit and we look forward to working with him.

Another new board member, Richard Pringle, joined mid year and is familiar with disability issues being the parent of a young woman who has disabilities. Welcome also to Richard. We have appreciated his input and participation.

The staff has had a busy year with clients as well as preparing for another accreditation process which will take place this November.

I would like to thank Charisse for all her hard work and dedication to the society and for making my job as president so easy and enjoyable. Thanks to all the board members who take time out of their busy lives to serve on the board. Thanks to the staff who make this society a great place to work and a great place for our clients.

Respectfully submitted by Gail Meier

Treasurer's
Report

TREASURER'S REPORT

2007 – 2008

It is with pleasure that I submit the 2008 Treasurer's Report for the Kelowna and District Society for Community Living. For the year ended March 31, 2008, the Society revenues exceeded expenditures by \$24,922. The Society now has an accumulated fund surplus of \$557,411.

The administration division of the Society reported a deficit of \$1,067 which is significantly less than the loss of \$18,380 in the fiscal year ending 2007.

The Richter Street home reported excess funds of \$857. Funds were taken from the replacement reserve account this year for a new hot water tank, new flooring and repairs (new toilets and tub) in the bathroom. The replacement reserve account is left with a balance of \$8,347.

The Activity Service (day service), the society's largest service area, owed a net deficit this year of \$2,499.

The KDI Wood Shop continues its success with revenues exceeding expenditures by \$30,110. The sales remain stable contributing around \$50,000. per year. The staff is also kept busy handling the City of Kelowna stolen bike program which we are paid \$12,000 per year to manage.

Larry's Cycle and Sports is now well established in its new Sutherland location. The sales increased by about \$15,000 this year, but the expenditures still exceeded the revenue by \$7,590. Continued effort is being placed on maintaining a profitable cost of sales, new advertising ideas and drawing new customers to the store while providing quality service to those attending.

Integrated Career Opportunities (ICO) continues to be a source of great pride for our Society. It provides participants with meaningful employment in the Kelowna area with much focus this year on individualized employment. The service's revenues exceeded expenses by \$33,129.

Individualized funding expenses exceeded revenue by \$1,508 however this continues to be a very popular and worthy service which is directed by the person and/or their family.

It has been another successful year for the Society. We will work towards the goal of a new improved 555 Fuller Avenue facility. I wish to thank the management, staff and participants for their contributions, dedication and continued success.

Respectfully submitted by Denis Gates, Acting Treasurer

Management's Responsibility for Financial Reporting

The accompanying financial statements of the Kelowna & District Society for Community Living and all the information in this annual report are the responsibility of management and have been approved the Board of Directors.

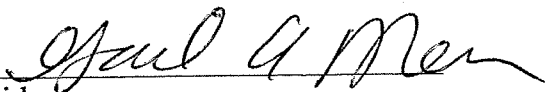
The financial statements have been prepared by management in accordance with Canadian generally accepted accounting principles. Financial statements are not precise since they include certain amounts based on estimates and judgements. When alternative accounting methods exist, management has chosen those it deems most appropriate in the circumstances, in order to ensure that the financial statements are presented fairly, in all material respects.

The Society maintains systems of internal accounting and administrative controls of high quality, consistent with reasonable cost. Such systems are designed to provide reasonable assurance that the financial information is relevant, reliable, and accurate and the Society's assets are appropriately accounted for and adequately safeguarded.

The Board of Directors is responsible for ensuring that management fulfills its responsibilities for financial reporting and is ultimately responsible for reviewing and approving the financial statements.

The Board of Directors reviews the Society's financial statements and recommends their approval. The Finance Committee meets periodically with management, as well as the external auditors, to discuss internal controls over financial reporting issues, to satisfy themselves that each party is properly discharging their responsibilities, and to review the annual report, the financial statements, and external auditors' report. The Board of Directors takes this information into consideration when approving the financial statements for issuance to the stakeholders. The Board of Directors also considers the engagement of the external auditors.

The financial statements have been audited by Murray Rossworn Inc. in accordance with Canadian generally accepted auditing standards on behalf of the ratepayers. Murray Rossworn Inc. has full access to the Board of Directors and to management.



President

Auditor's
Report

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING

FINANCIAL STATEMENTS

**March 31, 2008
(Audited)**

MURRAY ROSSWORN INC.
Chartered Accountants

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING

FINANCIAL STATEMENTS

**March 31, 2008
(Audited)**

MURRAY ROSSWORN INC.
Chartered Accountants

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING

March 31, 2008

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AUDITORS' REPORT

To the Members of
Kelowna & District Society for Community Living:

We have audited the Statement of Financial Position of the Kelowna & District Society for Community Living as at March 31, 2008 and the Statements of Financial Activity, Changes in Fund Balances, Changes in Financial Position, and Changes in Replacement Reserve Fund 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 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 financial statement presentation.

In common with many charitable organizations, the organization derives revenue from fundraising, the completeness of which is not susceptible to satisfactory audit verification. Accordingly, our verification of these revenues is 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 fundraising revenues, excess or revenue over expenditures, assets and surplus.

In our opinion, except for the effects of adjustments, if any, which we might have determined necessary had we been able to satisfy ourselves concerning the completeness of fundraising 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, 2008 and the results of its operations and the changes in its financial position for the year then ended in accordance with Canadian generally accepted accounting principles. 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.

Our audit was made for the purpose of forming an opinion on the consolidated financial statements as a whole. The current year's supplementary information on the financial position and operating results of individual functions included on pages 15 - 16 are presented for the purposes of additional analysis. Such supplementary information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and in our opinion, are fairly stated, in all material aspects, in relation to the consolidated financial statements taken as a whole.

We have not examined, and do not express an opinion on the financial statements for the preceding period. The prior year financial statements were audited by another accountant.

June 6, 2008

Chartered Accountants

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
STATEMENT OF FINANCIAL POSITION
(Audited)

As at March 31, 2008

	Operating fund	Capital asset fund	Replacement reserve fund	Total 2008	Total 2007
ASSETS					
Current assets					
Cash	\$ 181,835	\$ 9,402	\$	\$ 191,237	\$ 180,363
Term deposits (Note 2)	97,503	293,322		390,825	379,585
Restricted cash (Note 3)	11,774		8,347	20,121	23,520
Accounts receivable	68,488			68,488	55,085
Inventory (Note 4)	99,774			99,774	100,471
Prepaid expenses	23,241			23,241	32,667
	482,615	302,724	8,347	793,686	771,691
Capital assets (Note 5)		470,215		470,215	456,321
	482,615	772,939	8,347	1,263,901	1,228,012
LIABILITIES					
Current liabilities					
Accounts payable	\$ 223,227	\$	\$	\$ 223,227	\$ 216,649
Current portion of long term debt		231,196		231,196	237,436
	223,227	231,196		454,423	454,085
Accrued sick time reserve (Note 6)	239,569			239,569	242,561
Long term debt (Note 7)		12,498		12,498	18,594
	462,796	243,694		706,490	715,240
FUND BALANCES					
Rental assistance program surplus (deficit) (Note 8)	4,604			4,604	(15,994)
Invested in capital assets		226,521		226,521	200,292
Externally restricted (Note 3)	11,774		8,347	20,121	10,281
Internally restricted (Note 9)	21,995	302,724		324,719	346,799
Unrestricted	(18,554)			(18,554)	(28,606)
	19,819	529,245	8,347	557,411	512,772
	\$ 482,615	\$ 772,939	\$ 8,347	\$ 1,263,901	\$ 1,228,012

Approved by the Directors:

Director



Director



The accompanying notes are an integral part of the financial statements

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
STATEMENT OF FINANCIAL ACTIVITY
(Audited)

For the year ended March 31, 2008

	Operating fund	Capital asset fund	Replacement reserve fund	Total 2008	Total 2007
REVENUE					
Community Living BC	\$ 1,928,181	\$	\$	\$ 1,928,181	\$ 1,839,373
Sales	389,840			389,840	418,211
Client rent contributions	46,458			46,458	45,665
BC Housing grant	85,034			85,034	85,098
Other income	44,859			44,859	44,718
Bingo revenue	30,000			30,000	30,000
United Way	23,322			23,322	23,007
Donations	11,652	10,868		22,520	68,502
Interest	3,765	9,801	90	13,656	8,716
	2,563,111	20,669	90	2,583,870	2,563,290
EXPENSES					
Automotive	54,803			54,803	55,050
Bank charges & interest	18,458	38		18,496	11,473
Cost of goods sold	171,175			171,175	195,043
Incentive allowance	19,471			19,471	23,085
Education and recreation	38,163			38,163	21,908
Equipment rent	8,484			8,484	9,192
Food	12,220			12,220	10,995
Insurance	13,066			13,066	12,761
Interest on long term debt	1,041			1,041	1,116
Maintenance and repairs	37,438		6,975	44,413	41,473
Office	33,938			33,938	36,617
Professional fees	15,196			15,196	19,752
Property taxes	2,009			2,009	4,074
Rent	116,780			116,780	119,423
Society expenses	14,935			14,935	23,956
Supplies	12,848			12,848	19,948
Staff development	20,894			20,894	13,685
Technological enhancement	19,987			19,987	26,121
Telephone and utilities	44,360			44,360	40,694
Wages and benefits	1,855,494			1,855,494	1,678,563
Amortization		41,175		41,175	39,615
	2,510,760	41,213	6,975	2,558,948	2,404,544
Excess (deficiency) of revenue over expenses before adjustments	52,351	(20,544)	(6,885)	24,922	158,746
Rent subsidy adjustment	19,717			19,717	
Excess (deficiency) of revenue over expenses	72,068	(20,544)	(6,885)	44,639	158,746
Fund balances, beginning	(24,043)	526,534	10,281	512,772	354,026
INTERFUND TRANSFERS					
Mortgage principal repayments	(12,333)	12,333			
Replacement reserve provision	(4,951)		4,951		
Capital assets acquired	(10,922)	10,922			
Fund balances, ending	\$ 19,819	\$ 529,245	\$ 8,347	\$ 557,411	\$ 512,772

The accompanying notes are an integral part of the financial statements

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
STATEMENT OF CHANGES IN FINANCIAL POSITION
(Audited)

For the year ended March 31, 2008

	Total 2008	Total 2007
Cash flows from operating activities		
Source of cash		
Funding	\$2,542,178	\$2,500,364
Interest income	3,765	2,890
Subsidy adjustment from BC Housing	19,717	
Uses of cash		
Salaries and benefits	(1,858,485)	(1,925,044)
Materials and services	(639,229)	(512,968)
Mortgage interest	(17,812)	(13,132)
Interfund transfers:		
Repayment of mortgage principal	(12,333)	
Replacement reserve provision	(4,951)	
Purchase of capital assets	(10,922)	
Transferred from (to) other funds		
Net increase in cash	21,928	52,110
Cash, beginning of year	269,183	217,073
Cash, end of year	\$ 291,111	\$ 269,183

FINANCING AND INVESTING ACTIVITIES

	Capital asset fund	Replacement reserve fund	Total 2008	Total 2007
Source of cash				
Interest income	\$ 9,801	\$ 90	\$ 9,891	\$ 3,407
Donations	10,868		10,868	65,608
Proceeds from debt issuance				235,000
Uses of cash				
Mortgage principal	(12,333)		(12,333)	
Exenditures	(10,922)	(6,975)	(17,897)	(329,066)
Interfund transfers				
Repayment of mortgage principal	12,333		12,333	(9,957)
Replacement reserve provision		4,951	4,951	
Capital assets acquired	10,922		10,922	
Transferred (to) from other funds	(34,369)	2,463	(31,906)	243,886
Net increase in cash	(13,700)	529	(13,171)	208,878
Cash, beginning of year	316,424	7,818	324,242	105,407
Cash, end of year	\$ 302,724	\$ 8,347	\$ 311,071	\$ 314,285

The accompanying notes are an integral part of the financial statements

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
STATEMENT OF CHANGES IN REPLACEMENT RESERVE FUND
(Audited)

For the year ended March 31, 2008

	Total 2008	Total 2007
Richter House		
Balance, beginning of year	\$ 10,281	\$ 5,443
Add:		
Replacement reserve provision	4,951	4,838
Interest income	90	
Less:		
Expenditures	(6,975)	
Balance, end of year	\$ 8,347	\$ 10,281

Capital replacement for the year consists :

Paint and repair interior	6,975
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The accompanying notes are an integral part of the financial statements

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
STATEMENT OF SHELTER OPERATIONS (RICHTER HOUSE)
(Audited)

For the year ended March 31, 2008

Schedule 3

	Total 2008	Total 2007
REVENUES		
Rent subsidies - BC Housing	10,592	10,979
Rental income	12,297	12,560
CMHC		1,921
	22,889	25,460
EXPENSES		
Administration	483	1,408
Audit	967	
Insurance	2,307	1,089
Interest on long term debt	1,041	1,116
Maintenance and repairs	2,951	3,146
Property taxes	2,161	2,230
Utilities	3,138	5,051
Wages and benefits	2,334	2,334
	15,382	16,374
Excess revenues over expenditures	7,507	9,086
INTERFUND TRANSFERS		
Replacement repairs	(6,975)	
Mortgage principal repayments	(5,949)	(5,877)
Replacement reserve provision	(4,951)	(4,838)
	(17,875)	(10,715)
Rent subsidy surplus (deficit) from operations	(10,368)	(1,629)

The accompanying notes are an integral part of the financial statements

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING

SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

(Audited)

For the year ended March 31, 2008

PURPOSE OF THE SOCIETY

The Kelowna & District Society for Community Living (the "Society") is incorporated under the laws of the Society Act of British Columbia as a not-for-profit organization and is a registered charity under the Income Tax Act. The Society provides training and education to mentally handicapped individuals.

1. SIGNIFICANT ACCOUNTING POLICIES

a) Fund accounting

The Society follows the restricted fund method of accounting for contributions.

The Operating Fund reports restricted operating grants, revenue and expenses related to the Society's activities.

The Capital Asset Fund reports the ownership and equity related to the Society's capital assets.

The Replacement Reserve Fund reports assets, liabilities, revenues and expenses related to capital asset replacement activities.

b) Revenue recognition

Contributions from BC Housing and CMHC

Contributions received from BC Housing and CMHC for the replacement reserve fund have been reported as interfund transfers from the Operating Fund to the Replacement Reserve Fund.

Contributions received from BC Housing and CMHC for the acquisition of capital assets have been recognized as revenue in the Capital Asset Fund.

Other contributions

The organization follows the deferral method of accounting for contributions within the operating fund. Restricted contributions are recognized as revenue in the year in 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.

Investment income

Interest income earned on operating funds is recognized as revenue in the Housing Fund in the period the investment income is earned.

Interest income earned on replacement reserve funds is recognized as revenue in the Replacement Reserve Fund in the period the investment income is earned.

Interest income earned on building reserves is recognized as revenue in the Capital Asset Fund in the period in which the income is earned.

c) Inventory

Inventory of materials and finished goods are recorded at the lower of cost and net realizable value.

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES
(Audited)

For the year ended March 31, 2008

d) Capital assets

Capital assets are recorded at cost. Amortization of buildings is provided on a straight-line basis over the estimated useful life of 20 years. Amortization of equipment and leasehold improvements is provided on a straight-line basis over the estimated useful life of 10 years. Amortization expense is reported in the Capital Asset Fund.

e) Change in accounting policy

The Society adopted the provisions of CICA Sections 3855 Financial Instruments - Recognition and Measurement, 3865 Hedges, and 1530 Comprehensive Income on April 1, 2007 which address the classification, recognition and measurement of financial instruments and hedges in the financial statements. There has not been any changes to the prior year as a result of adopting these new standards.

f) Use of estimates

The financial statements of the Society have been prepared by management in accordance with Canadian generally accepted accounting principles. As such, management is required to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. Actual results could differ from those estimates. The financial statements have, in the opinion of management been prepared using careful judgement within the reasonable limits of materiality and within the framework of the accounting policies identified.

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
NOTES TO THE FINANCIAL STATEMENTS
(Audited)

For the year ended March 31, 2008

2. TERM DEPOSITS

	2008	2007
Operating fund		
Term deposit including accrued interest at 3% per annum maturing April 27, 2008	97,503	94,898
Reserve fund		
Matured during the year		49,559
Withdrawn during the year		235,128
Term deposit including accrued interest at 3% per annum maturing November 30, 2008	50,997	
Term deposit including accrued interest at 4.15% per annum maturing July 7, 2009	242,325	
	390,825	379,585

3. RESTRICTED CASH

Under the terms of the agreement with BC Housing Management Commission, the Replacement Reserve funds are to be credited with an amount determined by the budget provision per annum plus interest earned. These funds along with accumulated interest, must be held in a separate bank account and/or invested only in accounts or instruments insured by the Canada Deposit Insurance Corporation or the Credit Union Deposit Insurance Corporation and may only be used as approved by BC Housing Management Commission.

Under the terms of the agreement with BC Lottery Corporation, gaming funds may only be used for approved activities.

	2008	2007
Replacement reserve	\$ 8,347	\$ 7,818
Bingo funds	11,774	15,702
	\$ 20,121	\$ 23,520

4. INVENTORY

	2008	2007
Larry's Cycle	\$ 91,149	\$ 91,933
Woodshop	8,625	8,538
	\$ 99,774	\$ 100,471

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
NOTES TO THE FINANCIAL STATEMENTS
(Audited)

For the year ended March 31, 2008

5. CAPITAL ASSETS

	Cost	Accumulated amortization	Net Book Value 2007	Net Book Value 2006
Land	\$ 191,513	\$	\$ 191,513	\$ 191,513
Buildings - Workshop	352,135	212,268	139,867	147,532
Buildings under construction	44,153		44,153	
Equipment	188,224	165,733	22,491	22,890
Automotive	157,168	117,268	39,900	53,844
Group Home	108,746	77,145	31,601	34,596
Leasehold improvements	7,152	6,462	690	5,946
	<u>\$1,049,091</u>	<u>\$ 578,876</u>	<u>\$ 470,215</u>	<u>\$ 456,321</u>

6. ACCRUED SICK TIME RESERVE

The Society's employees are provided with sick leave on the basis of 1 day per month to the maximum of 156 days per employee. Accumulated sick leave can be carried over into succeeding years and amounted to \$239,569 as at March 31, 2008 (2007 - \$242,561). These benefits are not paid out upon termination and any unpaid amounts revert to the Society.

7. LONG TERM DEBT

	2008	2007
CMHC mortgage for Richter House, is repayable at \$583 per month including interest at 4.47% per annum, secured by the underlying assets due for renewal on December 1, 2008.	\$ 18,657	\$ 24,609
Interior Savings Credit Union demand loan for Sutherland House repayable at \$1,710 per month including interest at 6.25% per annum, secured by building due for renewal July 1, 2011.	225,037	231,421
	243,694	256,030
Less: current portion due within one year	231,196	237,436
	<u>\$ 12,498</u>	<u>\$ 18,594</u>

The anticipated principal repayable on the long-term debt on each of the projects over the next five years, upon mortgage renewal will be as follows:

	Sutherland House	Richter House	Total
2009	\$ 225,037	\$ 6,159	\$ 231,196
2010		6,577	6,577
2011		5,921	5,921
	<u>\$ 225,037</u>	<u>\$ 18,657</u>	<u>\$ 243,694</u>

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
NOTES TO THE FINANCIAL STATEMENTS
(Audited)

For the year ended March 31, 2008

8. RENTAL ASSISTANCE PROGRAM SURPLUS

The Rental Assistance Program is jointly funded by British Columbia 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.

	2008	2007
Deficit, beginning of year	\$ (15,994)	\$ (18,633)
Excess (deficiency) of revenues over expenditures	881	2,639
Rent subsidy adjustment	19,717	
	<u>\$ 4,604</u>	<u>\$ (15,994)</u>

9. INTERNALLY RESTRICTED ASSETS

Major categories of internally imposed restrictions on net assets are as follows:

	2008	2007
Restricted for capital purchases	\$ 302,724	\$ 326,243
Restricted for expenditures at the board's discretion	21,995	20,556
	<u>\$ 324,719</u>	<u>\$ 346,799</u>

10. COMMITMENTS AND CONTINGENCIES

Any surplus on the shelter accounts represents an overpayment of rental assistance and may be reclaimed by the British Columbia Housing Management Commission and Canada Mortgage and Housing Corporation. During the current year, Richter House had a deficit of \$(10,368) (2007 - \$(1,629)).

The Society is a member of Health Benefit Trust. The Trust provides benefits to over 880 healthcare and community services employers in BC and covers over 80,500 employees. As at December 31, 2006 the Trust recorded an actuarial unfunded liability. The unfunded liability is not attributable to individual employers. An unfunded actuarial liability may cause an increase in long term disability contribution rates.

The Province of British Columbia has a covenant on certain properties.

The Society has entered into a commitment to lease the building premises for Larry's Cycle expiring December 31, 2008. Total monthly lease payments (including base rent, property taxes, fire insurance, and GST) are \$2,836.

The Society has entered into a lease agreement for a photocopier which expires in 2013. Monthly payments required under this agreement are approximately \$1,678.

11. FINANCIAL INSTRUMENTS

The Society's financial instruments consist of cash, term deposits, accounts receivable, accounts payable and accrued liabilities, and long term debt. The fair values of these financial instruments approximate their carrying values, due to the relatively short period to maturity. It is management's opinion that the Society is not exposed to significant interest, currency or credit risks arising from these financial instruments.

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING
NOTES TO THE FINANCIAL STATEMENTS
(Audited)

For the year ended March 31, 2008

12. ECONOMIC DEPENDENCE

The Society receives approximately 77% (2007 - 71%) of total revenues from government grants.

13. COMPARATIVE FIGURES

Certain comparative figures have been reclassified to conform to the accounting presentation adopted for the current year.

KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING

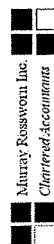
SCHEDULE OF REVENUE AND EXPENSES BY DEPARTMENT

(Unaudited)

For the year ended March 31, 2008

Schedule 1

	Administration	Larry's Cycle	Richter	ICO	Woodshop	Day Service	Individual funding	Wedding Basket	Rent assist	Transfer to other funds	2008
Revenue											
CLBC	\$	\$ 140,442	\$ 238,715	\$ 368,269	\$ 140,442	\$ 949,282	\$ 91,031	\$	\$	\$	\$ 1,928,181
Sales		250,965		87,964	50,911						389,840
Client rent contributions									46,458		46,458
BC Housing Grant			10,592						74,443		85,035
Other income	7,800	600			13,211	23,247					44,858
Bingo revenue						30,000					30,000
United Way						23,322					23,322
Donations	2,803					8,849				10,868	22,520
Interest	3,765									9,891	13,656
	14,368	392,007	249,307	456,233	204,564	1,034,700	91,031		120,901	20,759	2,583,870
Expenditures											
Administration charge	(157,800)	11,940	20,292	31,308	11,940	77,460	4,860			41,175	41,175
Amortization		4,782	2,213	18,945	3,409	20,273	4,367				54,803
Automotive	814	3,519				14,141					18,496
Bank charges and interest	836	1,310	812	1,997	1,187	32,857					38,163
Client education, recreation		3,782		205	6,652	8,832					19,471
Client incentive allowance				3,090	8,503						171,175
Cost of goods sold	7,265	159,582			1,219						8,484
Equipment rental											12,220
Food			12,220								13,066
Insurance	7,080	1,715	2,307			1,964					1,041
Interest on long term debt			1,041								44,415
Maintenance and repairs	9,470	4,853	2,951	3,529	4,466	12,171			6,975		33,939
Office and miscellaneous	12,595	13,619	1,505	1,496	965	3,759			1,396		15,196
Professional fees	13,800										2,009
Property tax	188		2,161			(340)					116,780
Rent	(85,200)	34,156	(36,000)	18,000	33,600	33,600			118,624		14,934
Society expenses	7,394	593	490	1,653	539	4,265					20,894
Staff development	1,923	1,873	1,498	6,041	2,019	7,540					12,848
Supplies		1,790	1,543	1,286	1,763	6,466					19,986
Technological enhancement		1,798	599	5,794	2,598	9,197					44,360
Telephone and utilities	19,663	8,633	5,016	1,890	4,161	4,997					1,855,493
Wages and benefits	177,407	145,652	229,802	327,870	91,433	800,017	83,312				
	15,435	399,597	248,450	423,104	174,454	1,037,199	92,539		120,020	48,150	2,558,948
Excess (deficiency)	\$ (1,067)	\$ (7,590)	\$ 857	\$ 33,129	\$ 30,110	\$ (2,499)	\$ (1,508)	\$	\$ 881	\$ (27,391)	\$ 24,922



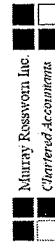
KELOWNA & DISTRICT SOCIETY FOR COMMUNITY LIVING

SCHEDULE OF REVENUE AND EXPENSES BY DEPARTMENT (Unaudited)

For the year ended March 31, 2007

Schedule 2

	Administration	Larry's Cycle	Richter	ICO	Woodshop	Day Service	Individual funding	Wedding Basket	Rent assist	Transfer to other funds	2007
Revenue											
CLBC	\$	\$ 135,856	\$ 230,645	\$ 379,549	\$ 135,856	\$ 805,988	\$ 99,221	\$ 52,259	\$	\$	\$ 1,839,374
Sales		235,273		115,708	59,938			7,292			418,211
BC Housing Grant			13,420						71,678		85,098
Donations	2,894									65,608	68,502
Client rent contributions									45,665		45,665
Other income	14,497				9,399	20,822					44,718
Bingo revenue						30,000					30,000
United Way						23,007					23,007
Interest	2,890									5,826	8,716
	20,281	371,129	244,065	495,257	205,193	879,817	99,221	59,551	117,343	71,434	2,563,291
Expenditures											
Administration charge	(148,436)	11,250	19,062	32,958	11,250	64,742	4,370	4,804			39,615
Amortization	8,217	2,007	1,392	8,929	3,716	14,828		526			62,102
Automotive	2,438	2,066	1,875	24,409	2,354	24,074	4,532	354			11,473
Bank charges and interest	772	757				9,747		197			16,076
Client education, recreation		703	320	30	1,332	13,561		130			23,085
Client incentive allowance		4,752		390	7,597	7,965		2,381			195,043
Cost of goods sold		174,806		2,840	9,963			7,434			10,411
Equipment rental	9,192				1,219						10,995
Food			10,995			498		178			12,761
Insurance	9,465	676	1,944								1,116
Interest on long term debt			1,116								41,475
Maintenance and repairs	14,228	4,027	2,096	4,146	8,769	7,929		280			34,179
Office and miscellaneous	13,651	11,144	1,408	2,920	1,122	2,764		1,170			19,752
Professional fees	14,000					4,356			1,396		4,074
Property tax	130		2,230			1,714					119,422
Rent	(85,200)	34,283	(36,000)	18,000	33,600	33,600		7,831	113,308		23,957
Society expenses	15,993	494	986	1,657	499	3,624		704			13,686
Staff development	1,840	3,526	403	4,481	283	3,047		106			19,948
Supplies		7,106	1,050	2,368	3,428	5,769		227			26,122
Technological enhancement		2,351	205	6,759	2,624	14,183					40,694
Telephone and utilities	17,058	8,568	5,051	2,301	1,109	4,202		2,405			1,678,559
Wages and benefits	165,313	136,962	219,167	303,892	92,533	639,120	86,199	35,373			2,404,545
	38,661	405,478	233,300	416,080	181,398	855,723	95,101	64,100	114,704		158,746
Excess (deficiency)	\$ (18,380)	\$ (34,349)	\$ 10,765	\$ 79,177	\$ 23,795	\$ 24,094	\$ 4,120	\$ (4,549)	\$ 2,639	\$ 71,434	\$



Self-Advocate's
Report

SELF ADVOCATE'S REPORT

2007 – 2008

This past year has been an active one for the self advocates from Kelowna. A joint fundraising venture was held with the support of KDSCL and TIER Support Services in the spring. The dance raised over \$5700.00 to support the group to attend the BCACL annual general meeting in Surrey.

This was Leanne Froese's last year as a representative to the BCACL caucus for this region. Nella Clinaz and Dale Froese both ran for a seat and Nella was elected as our new representative. Nella will begin attending caucus meetings in August. Dale Froese presented with the Keynote speaker as part of a panel to an approximate audience of 500 people. Dale represented the self advocates admirably. CLBC was also supportive of the self advocates and sponsored two individuals to attend.

Several self advocates along with CLBC staff held a garage sale (2nd annual) that raised approximately \$400.00. This venture proved to be a lot of work for those involved and will be discussed in the future to determine if it should be held a 3rd time.

The group elected Dale Froese as secretary and Mindy Tompkins as the treasurer. Self advocates continue to meet at the Parkinson Recreation Center and have had a number of new members join this past year.

Dale Froese and Kelly Tompkins both attended the Down's Syndrome Society of Canada meeting in the spring where Dale was elected the chair.

Self advocates continue to work locally on issues of transportation and employment. The HANDYdart system is not able to accommodate individuals into the bus who along with their wheelchair, exceed 440 lbs. Most taxi companies are also unable to transport individuals in wheelchairs. On a positive note, HANDYdart services were expanded to both Lake Country and the Westside. Employment remains a challenge for most self advocates however there are many success stories including CLBC hiring two self advocates.

KDSCL through ICO and the self advocates hosted a very successful Employer appreciation breakfast in the fall and recognized the employer community for all their support of people with disabilities. The mayor of Kelowna addressed and recognized the efforts made by all and spoke of the 10 by 10 challenge. CLBC and BCACL representatives were also present.

Issues of plain language continue to be worked on both in partnership with KDSCL and TIER as well as CLBC.

The self advocates would like to thank KDSCL for their continued support and facilitation throughout the past year.

Respectfully submitted by the Kelowna Self Advocates and their advisors: Miki Hanna and Mark Wengrowich

Service

Reports

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

POLICY: SERVICES

Services are driven by individuals' goals and on the belief that people with disabilities are entitled to the same rights and opportunities as all citizens. Opportunities at times are adapted to accommodate the differing abilities of each person.

Activity Service Purpose

Day Service

Provide opportunities for individuals to develop skills and abilities that promote self-esteem and independence through productive meaningful activities in recreation and leisure, volunteerism and life skill development.

Services are provided on an individual or group basis and specifically develop knowledge and skills in communications, personal and civic responsibility, safety, self-help, domestic, health, wellness, volunteerism, recreation, leisure, socialization and community participation.

Services are offered at 2 community locations.

Social Recreation Service

Provide community based evening and weekend social recreation opportunities to individuals to assist them in developing friendships.

Travel Club

Provide opportunities for individuals to travel; to rest, relax and have experiences outside their own community.

Business Services Purpose

Provides opportunities for individuals to acquire knowledge and work skills in society owned businesses that either enhance the person's ability to secure gainful employment in a time limited placement or provide the person with productive meaningful activity. Enables the society to subsidize the costs associated with not-for-profit service delivery.

Services specifically develop knowledge and skills in employer expectations, bicycle maintenance and repair, woodworking, assembly, packaging, sorting, shredding, sales, communications, personal responsibility, safety, recreation, leisure, socialization and community participation.

Services are provided at Larry's Cycle and Sports and the KDI Wood Shop.

Integrated Career Opportunities (ICO) Purpose

Provide opportunities for employment in community by teaching individuals the skills necessary to find, secure and maintain the employment of their choice. Teach life skills to individuals in community in order for them to maintain the greatest level of independence.

Service specifically offer assessments, education, skill development, support, on-site training, monitoring, follow up and the retention required to find and maintain long term employment. Services teach personal responsibility, safety, budgeting, health and hygiene.

Residential Services Purpose

Provide a safe, respectful, healthy and supportive service to assist individuals to live interdependently in a manner that reflects their lifestyle choices.

Services specifically develop knowledge and skills in communications, personal and civic responsibility, safety, self-help, domestic, health, wellness, hygiene, recreation, leisure, socialization and community participation.

Individualized Funding Service/Home Sharing Purpose

Provide services that are directed by the person with a disability, their family and/or support network. Funding is provided by the person, their family, their support network or CLBC.

Definitions and information for reference:

Employment Standards Act: Was amended to allow people to be involved in supported work which includes "services that are directed towards helping the person with a disability improve his/her quality of life and become included as an integral part of the community by helping the person become successful in areas such as employment, building meaningful personal relationships and living as independently as that person chooses". (ESR Section 32-Employees excluded from the Act, Policy Interpretation)

The Employment Standards Act (ESA) Table in Section 32 of the regulations sets the rules for how people in our province. These rules do not apply to persons who: perform the work activities specifically described; or are receiving certain types of income assistance, allowances or benefits. The following matrix (table) was developed to identify when the act has authority (power) and is broken down into four categories: Support, Preparation, Training and Employment.

	SUPPORT	PREPARATION	TRAINING	EMPLOYMENT
Program Goals	Maintain existing skills and behavior levels. Provide support. Relationship building. Build trust.	Work related behavior development. Explore options and develop goals. Build life skills. Build pre-vocational skills.	Employment skills development. Education / work experience.	Skills and performance commensurate (equal) with employer expectations in a work environment. Choose and keep job of choice.
Work Environment	Safe, supportive, stable. No time limit.	Therapeutic. Work activity is secondary to therapeutic goals of the individual.	Supportive skills development. Supported team. Time limited.	Ongoing support as needed Supported. Employment.

	SUPPORT	PREPARATION	TRAINING	EMPLOYMENT
Attendance / Performance Expectations	Opportunity to participate is provided. No product performance expected.	Expected to attend set hours. Some expectations for performance.	Expected to attend set hours. Productivity is expected to improve over time.	Expected to attend set hours. The individual is expected to produce a product within a determined quantity and quality level.
Remuneration (Payment)	None or Stipend	Incentive allowance	Training allowance	Wage
Act Applies	No	No	Yes - Exemption	Yes

ESA does not apply to Support and Preparation, however does apply to Training and Employment. There is an exemption from the Act for time limited training via training plans. All four categories are intended to be applied on an individualized basis and further explained/justified where applicable through training plans, which are developed with and for participants. KDSCL does not endorse a training allowance and does not use the Training Category.

Citizenship: The Citizenship Act, which is the current national legislation in force in Canada, came into effect on February 15, 1977. It defines "citizen" as "a Canadian citizen" and provides that both native-born and naturalized citizens are equally entitled to all the rights, powers and privileges and subject to all the obligations, duties and liabilities of a citizen, which are governed by numerous provincial and federal laws and the Constitution Act. In all provinces and in the federal jurisdiction, citizens of the age of majority are guaranteed political rights including the right to vote and run for office.

Incentive Pay: Paid to business service recipients to cover incidental costs of attending services.

Productive meaningful activities (Support and Preparation): Enables a person to participate in his/her community. Mutually benefits others. Enhances self worth. Improves health and wellness. Provides social interaction enabling the person to develop relationships. Enables a person to learn. Assists a person to become self-sufficient.
Outcome: The person achieves citizenship.

Supported Employment: A service to assist individuals on the jobsite to work independently. Job coaching to a maximum of 420 hours with retention support provided throughout the person's employment thereafter.

Outcome: The person becomes a member of an employer's work force and is given the same opportunities as other employees while receiving all the benefits of paid employment.

Group Work or Enclave (Employment): Work performed by a group at a specific site where each person is earning at least minimum wage. May be full or part-time. On going support is provided by a job coach who not only fulfills the defined job coaching duties but also performs the work.

Outcome: Person is working to his/her maximum capacity in a paid position with the assistance of on going staff support.

Job Coach: Assists the person to fulfill the employer's employment requirements through job assessments, task evaluations, monitoring, fading and retention. Identifies barriers to employment and develops ways and means to eliminate them. Assist co-workers and employers through the transition to natural employment supports. Provides support and skill development related to obtaining employment such as preparation, job search strategies, job applications, resume writing, interview skills and job class. Outcome: The person works independently.

Effective/Revision Date

May 30, 2005
March 27, 2006
June 18, 2007
July 21, 2008

Board Approval



Date Approved

May 30, 2005
March 27, 2006
June 18, 2007
July 21, 2008

ACTIVITY SERVICE

2007-2008

The KDSCL Activity Service continued to provide opportunities for individuals to try new activities, increase their volunteer time and community participation. The number of individuals we supported increased. Over the course of the year on average eighty-two (82) people attended. Services were provided in community at 555 Fuller Avenue and 925 Sutherland Street.

The activity registration form continued to enable individuals to have input and make choices about their daily schedule. The scheduling committee met regularly to research new community activities and supported individuals to participate in those activities. This past session staff developed curriculums for each class/activity and this proved to be very helpful to guide staff and provide information on tasks learned each session.

We had a number of participants who took advantage of a basic computer course which was done at Power Concepts and a basic First Aid course offered by St. John's Ambulance. We also offered a basic bike repair course at Larry's Cycle and Sports. Participation was small but very enthusiastic.

Our volunteer placements were very popular and individuals were appreciated wherever they assist. We continued to volunteer at Stillwaters, Windsor Manor, SPCA, Friendship Centre, Pineacres, Compassionate Canada and the Food Bank. Individuals we support logged 3683 volunteer hours this year working for non-profit societies in our community. Our volunteers are dedicated and eager to continue. We are always on the hunt for more volunteer positions within the community.

We discontinued music and cooking classes. We will be offering a pre-requisite class in Food Safe before we offer any more cooking classes. The music moved to a volunteer placement at a senior's home which enabled us to give back and participate within our community. We had a request to expand the volunteer music program and hope to do so this fall. We had very positive feedback from CURVES and the Aqua-fit classes at Johnson-Bentley pool. The staff at both programs were pleased that we chose their facilities.

The evening weekend leisure and recreational service was so popular that we had to place some restrictions on the numbers of activities each individual signed up for each month. In the past year we had sixty-six (66) participants who took part in fifty-six (56) different activities. The variety ranged from hockey games, theatre productions, attendance at all of the fairs to festivals throughout the city.

The KDSCL Travel Club developed a three year plan however it was updated regularly with new destinations due to lack of interest in some trips. In addition, shorter trips within Canada made it more accessible for those individuals who did not have passports. Individuals must have passports for all trips out of Canada. We continued to

offer new destinations with good responses and did try to offer specials however they needed to be booked quickly to take advantage of the cheaper prices.

Camp Owaissi continued to be a popular event with the numbers of participants growing each year. It has given individuals opportunities to relax, holiday, assist with camp life, enjoy social times with friends including campfires and sing-a-longs. Everyone thorough enjoys the week.

Respectfully submitted by Susan Harney, Activity Supervisor

INTEGRATED CAREER OPPORTUNITIES (ICO)

2007 – 2008

This year we continued to see a strong demand from all types of businesses for employees in Kelowna. Our emphasis remained on person centered planning for employment. Individuals were assisted in conducting their own job searches, supported in the interviews and given job coaching for their introductory days on worksites. Through this process ICO assisted more individuals in finding their own jobs in the community at Wal Mart, Columbia Bottle Depot, Paynter's Vineyard, Tim Horton's, Apple Valley, Save On Foods, Home Depot, Little Caesar's, CLBC, Aramark and in construction. Throughout the year ICO provided service to seventy-two (72) people. Thirty-eight (38) people were assisted in searching for employment. There were twenty six (26) new employment placements, fifteen (15) with community employers, eleven (11) with KDSCL work crews and contracts. Forty (40) people received job coaching and/or assistance in maintaining their employment.

ICO discontinued pre-employment classes; we opted for a more individualized and person centered approach through the discovery process. This process involved getting to know the individual in their various environments, including home, community, with friends, etc. We explored all the domains of an individual's life and collected information that assisted us to promote their positive attributes to potential employers.

The Driver's Education class was taught twice in the past year. The first class had six (6) individuals and the second, four (4). The classes focused on providing the knowledge required to write and successfully pass the ICBC learner's test. Support for writing the actual test was also provided when requested. We also ran a forklift certificate course that was taught to three (3) individuals in a modified format. Shane Milligan received the instructor's training and taught the course. ICO also assisted four (4) individuals to get their Serving it Right certificate and supported individuals who requested assistance to obtain their passport.

Staff at ICO worked at developing a more community based recycling service. We partnered with Columbia Bottle Depot and moved our operations into their building. This move meant those individuals involved in the recycling of bottles no longer perform their work outside and that the equipment they use can remain in one place. We are currently working at developing a closer relationship with Columbia Bottle Depot and expanding our services in community.

ICO scaled down the size of our contracted yard work to just seven (7) contracts; three (3) are society properties and the others belong to BC Housing and the Abbeyfield Society. All contracts this year included a minor increase to cover the ever increasing fuel costs. In addition, we suggested efficiencies to UBCO and as a result created a work environment that promotes greater independence for the people we support enabling KDSCL to remove our cube van from the worksite.

In September ICO and the self advocates hosted a very successful recognition breakfast for employers in our community. The event was attended by Mayor Sharon Sheppard as well as representatives from CLBC and BCACL. ICO received funding to make this happen and produced a DVD that was presented to BCACL in January and then presented at the BCACL AGM in June.

Respectfully Submitted by Mark Wengrowich, Development Supervisor

BUSINESS SERVICES

2007 - 2008

KELOWNA DIVERSIFIED INDUSTRIES (KDI) WOOD SHOP

The KDI Wood Shop continued to grow in Kelowna's increasing building market. The wood shop served on average twenty-one (21) individuals throughout the year. We also gained 1 paid part time employee. Even though we met the demands of our consumers, we still managed to have some fun too.

The wood shop crew attended many events in or around the Okanagan including swimming at the Parkinson's and Athan's Recreation Centers, attending the Armstrong Fair, spending a day at O'Keefe Ranch, sledding and sleigh rides at Big White, hockey tournaments and participating at Atlantis Waterslide Park.

The Wood Shop provided many opportunities for the individuals we served striving to teach the following goals: employment and life skills, participation in community recreation and leisure activities, assisting people to gain independence to participate in both volunteer positions and paid employment.

The shredding department continued to be busy with current contracts and walk-ins. The wood shop prides itself with being a community based operation, so it was a natural fit to continue the Lost and Stolen Bike Program in conjunction with Larry's Cycle and Sports on behalf of the City of Kelowna. The wood shop crew took great pride in their workmanship, and will continue to meet the expectations of community.

Respectfully submitted by Scott Dionne and Shane Milligan

LARRY'S CYCLE AND SPORTS

Larry's Cycle and Sport has been at its new location for just over 2 years now. During this time, Larry's has seen changes in retail, service recipients and staff. Larry's served on average sixteen (16) individuals throughout the year.

Larry's began selling a new brand of snowboards last year however because the shipment was late; sales were not as good as anticipated. In preparation, three staff trained to use proper techniques for waxing of snowboards and skis, a service we will continue to offer through the next winter season.

Larry's began holding regular meetings with retail staff to get fresh input into future direction of the new store. Meetings proved to be very positive and began generating lots of new ideas, such as package deals on bikes and accessories, tune up punch cards, and bike riding nights (with group riding shirts). The meetings also helped to develop more in store policies and procedures. Larry's passed an external safety inspection of its facility, which was done through an independent inspection company called First Response.

Prior to the start of the summer, Larry's had the opportunity to hire two summer students through a "Hire a Student" program. This gave the store exposure to the teachers and students of local schools and provided the students with opportunities to develop to their skills and interest in retail and bike mechanics.

Larry's broadened its resourcefulness and used various advertising campaigns during the year. For example, a new website was created, radio advertisements ran and walk-in sales events were promoted. We participate as a sponsor in the City of Kelowna's "Bike to Work Week" program which was a success and two bikes were won as prizes at the event. Larry's also participated in the Lake Country Canada Day celebrations. A tent was set up to provide a tune-up and repair station for bikes that were involved in the children's bike parade. The turn out was great.

Larry's continued offering service recipients a variety of learning tasks and skills development as well as meaningful activities and participation in community events. Recipients attended the Armstrong Fair, skiing and tubing at Big White, trail rides on the greenway, visits to local tourist spots, music in the park, etc. They also had the opportunity to learn bike assembly through the stores contract with the Westbank Zellers. A new addition was the participation in the City's Stolen Bike Program, Larry's receives calls from the community, to retrieve bikes from various locations where bikes have been abandoned. Retrieved bikes are then taken to the KDI Wood Shop for further processing.

It has proven to be a good summer at Larry's Cycle and Sport. The store and staff would like to welcome Shane Milligan as a new staff member at Larry's. Welcome Shane!

Lastly, Larry's web page is up and running. Please feel free to browse the page at www.Larryscycle.ca.

Respectfully submitted by Lisa Milligan, Wayne Major and Rod Oranchuk

RESIDENTIAL SERVICES

2007 – 2008

RICHTER STREET

The last year remained consistent and active for the five (5) individuals living at the house. All residents remained active in selecting the activities they participated in and were assisted to plan for their vacations, evening and weekends as well as their daily activities.

Christmas was a busy time and because of all the parties, we chose to celebrate with families and friends in January. Family, friends, staff and their families got together for a Sunday afternoon of socializing wine and food. One Saturday, all the residents ventured up to Silver Star to experience the joy of a sleigh ride on the mountain. Other events residents participated in included whale watching off the coast at Tofino, vacationing in Mexico, the annual retreat at the Naramata Conference Center, Camp Owassi, a visit to Calgary and planned vacations to Disneyworld and a cruise.

The house required some maintenance over the year. A short pipe created a leak that baffled even the plumbers who finally fixed it. The result was a hole in the ceiling of one of the basement bedrooms that now requires repair. The toilets and tub are all in fine repair now and no longer create concern.

We were informed in the late fall that the Special People Society would close at the end of their fiscal year and that one of our residents would have to choose to receive service else where. As it turned out, the Special People Society did get the funding they required and alternative choices were not required.

APARTMENT SUBSIDY

KDSCL acquired three (3) additional apartment subsidies this year bring our total to nineteen (19). People in Motion asked KDSCL take over their subsidies which were designated to specific individuals. This increased the potential availability pool for a service that is in high demand and we continue to maintain a waitlist of interested applicants.

Respectfully Submitted by Mark Wengrowich, Development Supervisor

INDIVIDUALIZED FUNDING AND HOME SHARING SERVICES

2007 – 2008

INDIVIDUALIZED FUNDING

KDSCL provided individualized contracted services to seven (7) individuals and/or their families. One contract was short term and assisted a high school graduate through transition. The remaining six contracts ranged from three hours of support weekly to sixty.

The service provided varied from contract to contract depending on the need. We assisted with basic in home care, budgeting and community participation. Funding was provided by either the family, Community Living British Columbia (CLBC) or Interior Health.

We have thoroughly enjoyed providing this service. The expectations and accountability are clear and services can more readily be modified as required.

HOME SHARING

KDSCL engaged in our first home sharing contract in April. We had been working collaboratively with a family for a few years to establish a suitable "home" living situation. One person shares a home with two roommates. KDSCL oversees and monitors the service with input from all stakeholders.

It has been very successful, with all parties very pleased with the arrangement. The three currently reside happily together.

*Executive Director's
Report*

EXECUTIVE DIRECTOR'S REPORT

2007 – 2008

This was a difficult year. As most of you reading this report are aware, we lost a very valuable member of our team, Leagh Edwards who passed away unexpectedly April 17, 2008. Leagh worked for the society for over 25 years and his contributions were many. He is most known for his unwavering ability to listen and hear everyone. Leagh is gone, missed terribly, however not forgotten and the many gifts he left are reflected in the work we do each day.

The year was also challenging due to the continued Okanagan labour market. We devoted much time recruiting and retaining qualified support workers. We were in perpetual hiring mode, running advertisement and interviewing applicants basically throughout the entire year.

We expanded individualized support and increased contracts with people requiring service and/or their families and Community Living BC. In addition, a new home sharing service was created after many years of planning.

The Activity Service (Day Service) concentrated their efforts on moving facility based activities to community in order to foster more inclusive partnerships.

Integrated Career Opportunities (ICO) continued to reduce group community contract employment while increasing individual specific site employment opportunities.

Business Services which includes Larry's Cycle and Sports and Kelowna Diversified Wood Shop, continued to thrive and provide valuable activity placements.

We continued our mission to replace our building at 555 Fuller Avenue and finally received the development permit in August 2008. We approached individual community members in hopes of securing a fund raising campaign chair. Unfortunately to no avail. A formal fund raising and relocation plan will be developed in the fall.

We worked intermittently on implementing the ShareVision computerized program. Progress was hampered due to staffing shortfalls however what has been utilized and accomplished to date has created more efficiencies in our systems.

In October KDSCL hosted a community living month barbeque and in November a group of KDSCL staff coordinated and held a very prosperous Craft and Bake sale with the proceeds directly benefiting the people we support. Thank you to all those involved.

KDSCL joined the Kindale Association and other community living organizations in an effort to establish relationships with local Rotary Clubs to develop employment opportunities for adults with developmental disabilities. A Rotary Club representative from Armstrong, Eric Greenwood and I gave a presentation to the Kelowna Yacht Club chapter and will continue to encourage other chapters to get on board.

Through joint efforts and hard work, the self advocates, TIER Support Services, the City of Kelowna, CLBC and KDSCL hosted a very successful barbeque and dance at the Parkinson Recreation Centre at the end of March. The band Kinship played with proceeds assisting self advocates to attend the British Columbia Association for Community Living (BCACL) AGM.

In closing, I would like to thank:

- * The KDSCL staff including, management and supervisory personnel for their continued hard work, dedication and perseverance. They came together and supported one another and the people we serve during an extremely difficult time.
- * The Board of Directors for their continued support and commitment to ensuing KDSCL is an excellent community service provider.
- * Mrs. Hadgraft who continues to volunteer her time with the craft class.
- * The Kelowna Self-Advocates Caucus for their continued efforts at ensuring our community, including KDSCL is inclusive, accepting and embracing of the unique abilities of all.
- * The United Way and UCT for continuing to assist the organization to serve individuals with developmental disabilities.
- * The Vipond Golf Tournament coordinators and participants, with again a special thanks to the Kelowna Golf and Country Club for continuing to host this annual event.
- * The staff from Community Living BC (CLBC) who work in partnership with our organization to serve our community.
- * The many families, individual community members and community groups that continued to assist our organization daily and throughout the year.

Respectfully submitted by Charisse Daley

*Activity Quality Assurance
Manager's
Report*

ACTIVITY QUALITY ASSURANCE MANAGER

2007-2008

The Quality Assurance Management Cycle is the mechanism used within KDSCL to effect positive change through assessing, planning, taking action, and reviewing the results of the Society's work. This framework has been developed over many years, through experiences of the society, and most recently through input and guidance of CARF Accreditation Standards. Anyone who becomes involved in the Society also becomes involved in the Quality Assurance Management Cycle - people served, families, board members, staff, volunteers, funders, customers, and other community members. This involvement is through referrals, personal planning, input at meetings, surveys, documentation, suggestions, complaints, and exit interviews.

The Activity Quality Assurance Manager's (AQAM) function within this cycle is to ensure data is being collected, processed, and acted upon, always with the aim of improving services. This report is a brief summary of the actions taken within KDSCL during 2007-2008 to ensure information and resources have been available to carry out the necessary work to meet the objectives of the Society. The report contains an overview of the Quality Assurance Management Cycle, an overview of the goals of persons served, an analysis of demographics of people served, a condensed version of the satisfaction survey analysis, and the Outcomes Measurements Report. This is a summary, if the reader of this reports would like further detail, they should feel free to contact the acting AQAM Leslie Munro at 250-763-4839.

Always the work of the society must be guided by the needs and desires of the people we serve. As an agency our mission is to *"...assist people with disabilities to reach their individual goals and to participate and contribute as equal members of the community."* While it is our responsibility to structure a system that ensures accountability, we must ensure that the system is secondary to the importance of individual needs. The Quality Assurance Management Cycle at KDSCL was structured in large part by Leigh Edwards. We continue to miss him dearly. Although he contributed greatly to the building of KDSCL systems, I believe the biggest tribute to Leigh is that he is remembered most for his ability to drop whatever he was doing and to listen whole heartedly to individuals, to hear and understand them as completely as possible.

*"The demands of the system often distract us from hearing the voice of the people...because the demands...often speak louder than the people we serve...**The desires of the people are often quiet.**"* Beth Mount

Respectfully submitted by Leslie Munro, Acting Activity Quality Assurance Manager

KDSCL QUALITY ASSURANCE MANAGEMENT CYCLE

1. GATHER INPUT

Information from many sources is gathered throughout the year.

Person Centered Planning

- Planning meetings
- Activity or goal requests
- Plan review meetings

Satisfaction

- Satisfaction surveys
- Complaints
- Exit interviews

Health, Safety, and Accessibility

- Risk Management and Accessibility Assessment
- Workplace Risk Assessment and Preventing Violence in the Workplace Checklists
- Accessibility Checklists, external inspections
- Incident Reports and Incident Report Follow
- Suggestions to Occupational Health and Safety Committee

Miscellaneous input

- Suggestion boxes
- Requests and suggestions
- Solicited input regarding activities, policies, procedures, plans
- Professional development requests
- Leadership Action Plans

2. PLAN and TAKE ACTION

Action plans are created to address identified areas of concern for health, safety, accessibility, outcomes management, and technology. Individual Service Plans and Goal Plans are created for each person served. Action plans and Individual Service Plans identify specifically the action that needs to occur, who is responsible for carrying out the action, and by when.

Outcomes Management Action Plan

- Actions to meet outcomes
- Actions to respond to survey input
- Actions to respond to incident, complaints, exit interviews and demographic analysis

Person Centered Planning

- Individual Service Plans
- Goal Plans

Technology Action Plan

Health, Safety, and Accessibility

- Risk Management and Accessibility Action Plan

3. REVIEW

Information from many sources is reviewed and assessed throughout the year to ensure that needs and standards are met. Information gathered from assessment is used to effect change in personal plans, procedures, policies, and the overall direction of service.

Satisfaction

- Survey analysis
- Complaints analysis
- Exit interviews

Technology Action Plan

- Review results

Outcome Measurement results

Demographics Analysis

Health, Safety, and Accessibility

- Review and Complete Risk Management and Accessibility Action Plan
- Incident Report Analysis
- Incident Report Follow-up Analysis

Person Centered Planning

- Review goals of persons served number created, completed, in progress, rescinded

Demographics

From July 1, 2007 – June 30, 2008 KDSCL served 153 people (not including the apartment subsidy program), 79 men, 74 women.

	Under 19	19 – 25	26 – 35	36 – 45	46 – 65	65+	Total
Men	0	13	23	21	21	1	79
Women	1	14	16	24	16	3	74

KDSCL provides supports to a wide age range. The challenge was to provide services that were just as meaningful to people who are 20 as they are for people who are 50.

Participation in Services

Activity Service	82
ICO	72
Social Recreation	52
Business Service	44
Individualized Funding	7
Residential	5
Total	262

Many individuals used more than one service.

Exit from Service

17 people exited from service for the following reasons:

Moved from the region	1
Took employment	1
Death	1
Parental decision	1
Irregular attendance	3
Referral to another agency*	3
ICO follow-up**	4
Leave of absence	3

*Different agency - one individuals transferred from Day Service to a senior's program, one transferred from Day Service to Okanagan College, one transferred from Individualized Funding to another I.F. service provider.

**ICO Follow-up – when an individual has been employed without support for 3 months, their status changes to “follow-up”. The Individual completes an exit interview. After 18 months of being unsupported on the job site their file is closed.

People entering services

14 people entered services in the following areas:

ICO	4
Activity Service	6
Business Service	2
Individualized Funding	2

Internal Requests for Increased Service

Individuals in service made 28 requests for change or increase in service in the following areas:

Activity Services	15
Business Services	8
ICO	5

Current Individuals Waiting for Service

As of June 30, 2008, KDSCL had 11 people waiting for entrance or for increased service. 10 of those individuals are waiting for service in Activity Services, and 1 is waiting for service in the Business Services. 6 of the individuals waiting are already in service and are waiting for increased service. It is the policy of KDSCL that those people in service will receive priority placement.

Activity Services is the most requested service and the service with the most people waiting to enter. The Outcomes Management Action Plan for 2008-2009 addresses increasing the capacity of Activity Services to accommodate the increased requests for service.

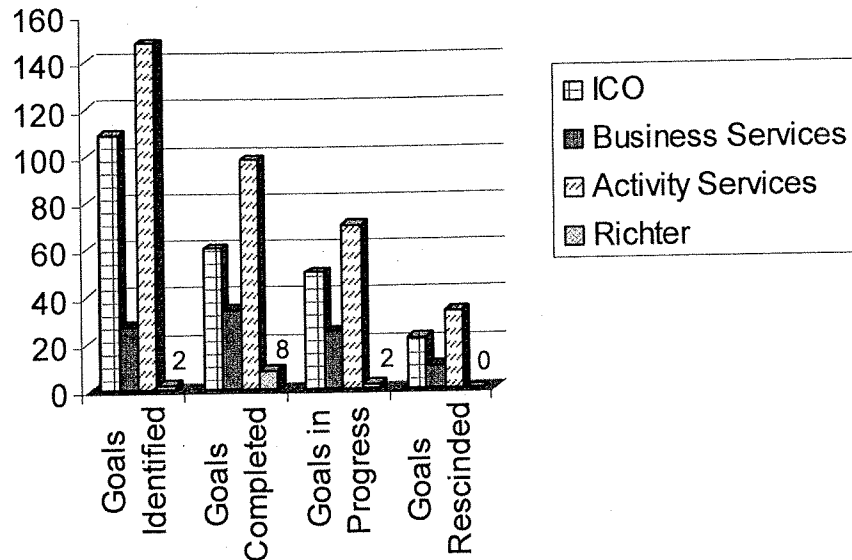
2007 - 2008 Goals Identified - Completed - In Progress - Rescinded

Person centered planning takes place largely through Individual Service Planning meetings. This year the society facilitated 132 Individual Service Plan meetings. If a person does not wish to have a formal meeting, supervisors and staff meet with the person and/or their support network, and assist in identifying how the agency can best support them. From person centered planning, goals are identified and progress towards meeting those goals is tracked.

	Goals Identified	Goals Completed	Goals in Progress	Goals Rescinded
ICO	109	60	50	22
Business Services	27	34	25	10
Activity Services	148	98	70	33
Richter	<u>2</u>	<u>8</u>	<u>2</u>	<u>0</u>
	286	200	147	65

Note: "Goals Completed", "Goals in Progress", and "Goals Rescinded" may include goals which were created in the previous year and completed, worked on, or rescinded in this year.

2007-2008 Goals Identified - Complete - In Progress - Rescinded



Satisfaction Surveys

May 2008, a total of 589 Satisfaction Surveys were sent to service recipients, families, caregivers, and funders. 84 Surveys were returned. Surveys were analyzed to determine overall satisfaction, and to identify strengths and weaknesses in services. Identified areas for improvement were then put in an Outcomes Management Action Plan.

Satisfaction Survey Service Recipients 2008

Surveys were sent to Service Recipients in each of KDSCL's areas of service for a total of 290 surveys. The following is a breakdown by area of Service Recipients who responded to the survey and indicates satisfaction levels through their answers to the questions asked. Some surveys contained more than one answer to a question, some questions were not answered.

	Day Service	ICO	Evening	Larry's	KDI	Apt Sub.	Richter	I.F.	Total
Sent	104	65	50	15	24	19	5	8	290
Received	16	7	10	2	2	1	5	1	44
Satisfaction: "Are you happy with the service?" Responses Usually and Yes combined.	100%	100%	100%	100%	100%	100%	100%	100%	100%
% Service recipient response	15%	11%	20%	13%	8%	5%	100%	13%	15%

Service Recipient Satisfaction Survey – 2008				
	Yes	Usually	No	No Ans.
1. Are you happy with the service?	41	3		
2. Do you like the activities you do when you are there?	35	4		
3. Do KDSCL staff treat you with respect?	43			1
4. Do KDSCL staff treat you nicely?	41	1	0	2
5. Do KDSCL staff listen to your questions and concerns?	40	3	0	1
6. Are your concerns addressed?	39	2	3	0
7. Do our hours of service meet your needs?	38	3	1	2
8. Have you had an ISP planning meeting?	33	0	7	4
9. Did you like your ISP (planning meeting)?	33	0	5	6
10. Do KDSCL staff ask you what your goals are?	38	1	2	3
11. Do KDSCL staff ask help you reach your goals?	39	2	1	2
12. Do you take part in community activities as often as you would like?	29	4	9	2
13. Do you feel safe at KDSCL?	40	2	1	1
14. Do you know your rights?	38	0	5	1
15. Do KDSCL staff talk to you about your rights?	34	5	4	1
16. Do KDSCL staff listen and help you with issues or concerns?	36	0	1	7

Family/Caregiver Satisfaction Survey 2008									
Surveys were sent to families and caregivers in each of KDSCL's areas of service for a total of 260 surveys. The following is a breakdown by area of families who responded to the survey and indicates satisfaction levels through their answers to the questions and their comments.									
	Day Service	ICO	Evening	Larry's	KDI	Apt Sub	Richter	I.F.	Total
Sent	100	56	49	17	28	0	7	3	260
Received	16	2	5	2	5	0	2	2	34
Satisfaction: "Are you happy with the quality of services provided?" Responses Usually and Yes combined.	100%	100%	100%	100%	100%		100%	100%	100%
% Family/Caregiver response	15%	4%	12%	12%	14%	0%	29%	67%	13%

Family Satisfaction Survey 2008 - Consolidated				
	Yes	Usually	No	No Ans.
1. Do you feel that the person receiving service from KDSCL:				
Makes his/her own choices at KDSCL?	18	10	3	2
Receives prompt, responsive service?	20	10	0	3
Chooses hours of service?	19	2	6	6
Advance to the level of independence they are seeking?	19	6	4	4
Achieves their individual goals?	19	8	3	3
Establishes relationships?	28	2	0	3
2. Do our services offer:				
Respect and dignity?	27	1	0	5
Enhanced quality of life and self-esteem?	26	0	1	6
Steady hours of service?	28	2	1	2
A secure, safe environment?	30	0	1	2
Positive experiences?	27	4	0	2
Competent, knowledgeable staff?	31	0	1	1
Flexibility?	23	6	0	4
Meaning and productivity?	22	6	0	5
3. Are you:				
Happy with the quality of services provided?	29	3	0	1
Being kept informed of options and services?	20	9	3	1
Receiving regular communications from KDSCL?	20	9	3	1
Able to understand the agency purpose?	23	4	2	4
Satisfied with the individual's accomplishments?	23	7	0	3

Funders Satisfaction Survey 2008										
39 Funder/Contractor Surveys were sent out in 6 of KDSCL's areas of service. The following is a breakdown by area of funders who responded to the survey and indicates satisfaction levels through their answers to the questions and their comments. The 3 that "Did Not Specify Area" were sent to CLBC, we assume their responses apply to services in general.										
	Day Service	ICO	Evening	Larry's	KDI	Apt Sub	Richter	I.F.	Not Spec	Total
Sent	3	0	0	0	0	1	2	8	25	39
Received	0					0	0	3	3	6
Satisfaction: "Are you happy with the quality of services provided?" Responses Usually and Yes combined.								100%	100%	
% funder response								38%	12%	15%

KDSCL Funder/Contractor Survey 2008				
	Yes	Usually	No	N/A
General Services:				
Are you satisfied with KDSCL's services overall?	6	0	0	0
Is KDSCL staff responsive?	6	0	0	0
Do KDSCL staff treat you with respect and consideration?	6	0	0	0
Do KDSCL staff keep you up to date with changes?	4	2	0	0
Do staff respond to your questions and concerns?	6	0	0	0
Do our hours of service meet your needs?	5	1	0	0
Do KDSCL staff work to better the lives of people with developmental disabilities?	5	1	0	0
Do KDSCL staff treat individuals with respect?	6	0	0	0
Do KDSCL's services promote and support community inclusion and participation?	5	1	0	0
Are you satisfied with the support the individual(s) you represent receive?	6	0	0	0
Are we flexible?	5	1	0	0
Leadership:				
Are you satisfied with KDSCL's leadership overall?	6	0	0	0
Are you satisfied with the leadership displayed by the executive director?	6	0	0	0
Are you satisfied with the leadership displayed by the managers?	6	0	0	0
Are you satisfied with the leadership displayed by the supervisors?	6	0	0	0

Outcomes Measurements

Developing and measuring outcomes is a crucial part of the Quality Assurance Management Cycle. Outcomes are the benefits experienced by individuals served as a result of participating in services, and also the benefits for other stakeholders based on their own expectations. Briefly, outcomes are the impact the services we provide have on the individuals we serve, and their support networks. Outcomes measurements are used to measure that impact. Outcomes objectives are derived from KDSCL's vision, mission statement, values, purpose, and strategic plan with input from all stakeholders. "Outcomes Objectives" define how we intend to have impact. "Measures" define what data will be collected to measure the impact. The target goal for the year is objectively defined. Who is responsible, and how the measure is to be applied is specified. In July, the results of the previous year's goals are reported.

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

OUTCOMES MEASUREMENTS: July 1, 2007 to June 30, 2008

Community Housing Services Outcomes: Richter Residence

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize involvement in personal decision-making and level of independence.	<i>Effectiveness</i> Percent of residents who participate in/or attend ISP, ISP reviews and/or planning meetings.	All residents	Annually	1. ISP's 2. ISP Semi Annual Reviews 3. ISP data base	Development Supervisor	100%	Not met - 80%, 4 out of 5 residents had an ISP.
Individuals experience citizenship through inclusion in their communities.	<i>Effectiveness</i> Number of different community activities the residents participate in of their choosing.	All residents	Annually	1. Post Activity Calendars 2. GPIT's 3. Activity Goal Request forms	Development Supervisor	All residents experience 10 different activities.	Goal met. Each resident experienced at least 10 different activities.
Individuals are safe and secure.	<i>Effectiveness</i> A. Number of emergency practices & procedures residents participate in. B. Minimize the amount of preventable incident reports.	A. and B. All residents	A. and B Monthly	A. 1. Emergency Procedure records B. 2. Incident reports and incident report follow up forms	A. and B Development Supervisor	A. 14 B. 0	A. Goal met B. Not met 2 preventable incidents. Incidents followed up and action taken to rectify.
Maximize the opportunities individuals have to develop friendships/relationships with non-paid persons.	<i>Effectiveness</i> Number of times that each resident interacts socially with a non-paid/ non-disabled person for more than 1 hour.	All residents	Annually	1. Post Activity Calendars	Development Supervisor	5 per person	Goal met. 5 interactions per person.

Richter Residence (continued)

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Provide services within annual allocated budget.	<i>Efficiency</i> Actual yearly revenue & expenditures.	Richter Residence	Annually	1. Audited Financial statements	Finance Manager	Surplus	Goal met.
Maximize satisfaction of all persons served.	<i>Service Satisfaction</i> Percent of individuals who express satisfaction with services.	All residents	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	95%	Goal met - 100%
Maximize satisfaction of the person's served families.	<i>Family Satisfaction</i> Percent of individuals who express satisfaction with services.	Families	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	95%	Goal met - 100%
Maximize satisfaction of all stakeholders (Funders, customers paid caregivers).	<i>Stakeholder Satisfaction</i> Percent of individuals who express satisfaction with services.	Stakeholders and External Influences	Annually	1. Satisfaction surveys 2. Complaints forms	AQAM	95%	Goal met - 100%

Activity Service

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize involvement in personal decision-making and level of independence.	<i>Effectiveness</i> Percent of service recipients who participate in/or attend ISP, ISP reviews and/or planning meetings.	Service Recipients	Annually	1. ISP's 2. ISP Semi Annual Reviews 3. ISP data base	Activity Supervisor	100%	Not met - 95% of service recipients had an ISP.
Maximize opportunities for persons to participate in social recreation and leisure activities and experience citizenship through inclusion in their communities.	<i>Effectiveness</i> Number of persons supported who participate in social and recreation activities of their choosing.	Service Recipients	Annually	1. Post Activity Calendars 3. GPIT's 4. Activity Goal Request forms 5. Activity Registration forms	Activity Supervisor	All day service participants have the opportunity to participate in 7 activities of their choosing.	Not met - 90% of service recipients had the opportunity to participate in 7 or more activities of their choosing.
Maximize opportunities for persons to participate in evening and weekend activities.	<i>Effectiveness</i> Number of persons supported who participate in evening and weekend activities.	Service Recipients	Annually	1. Social Recreation Leisure database	Activity Supervisor	40 different individuals participate in 10 different activities.	Not met - 16 people participated in 10 or more activities. (66 people participated. 56 different activities were offered.)

Activity Service (continued)

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize the opportunities for individuals participating in the evening and weekend service to develop friendships/ relationships with non-paid persons.	<i>Effectiveness</i> Number of times that each person interacts socially with a non-paid person for more than 1 hour.	Service Recipients	Annually	1. Social Recreation Leisure database	Activity Supervisor	10	Not met – 71% of participants (37 individuals) interacted socially for more than an hour with an unpaid person, on 10 or more occasions.
Maximize opportunities for persons to participate in community volunteerism.	<i>Effectiveness</i> Number of persons supported who requested and participated in community volunteerism.	Service Recipients	Annually	1. GPIT's 2. Activity Goal Request forms 3. Entrance... Forms Volunteers 4. Activity Registration forms	Activity Supervisor	95%	Not met – 27 requests for volunteer placements. 10 requests were rescinded, 15 people were placed (88%), 2 people are still waiting to be placed.
Maximize opportunities for persons to live independently.	<i>Effectiveness</i> Number of interactions staff has which foster life skill development.	Service Recipients	Annually	1. Notables 2. GPITs	Activity Supervisor	95%	Goal met - 100% of staff interactions were focussed on life skill development.

Activity Service (continued)

Individuals are safe and secure.	<i>Effectiveness</i> Minimize the amount of preventable incident reports.	Service Recipients	Monthly	1. Incident reports 2. Incident report follow up forms	Activity Supervisor	0	Not met – 19 preventable incidents. Incidents followed up and action taken to rectify.
Provide services within annual allocated budget.	<i>Efficiency</i> Actual yearly revenue & expenditures.	Day Service	Annually	1. Audited Financial statements	Finance Manager	Surplus	Not met. Deficit.
Maximize satisfaction of all persons served.	<i>Service Satisfaction</i> Percent of individuals who express satisfaction with services.	Service Recipients	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	Goal met - 100%
Maximize satisfaction of person's served families.	<i>Family Satisfaction</i> Percent of individuals who express satisfaction with services.	Families	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	Goal met - 100%
Maximize satisfaction of all stakeholders (Funders, customers, paid caregivers).	<i>Stakeholder Satisfaction</i> Percent of individuals who express satisfaction with services.	Stakeholders and External Influences	Annually	1. Satisfaction surveys 2. Complaints forms	AQAM	90%	Goal met - 100%

Business Services

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize involvement in personal decision-making and level of independence.	<i>Effectiveness</i> Percent of service recipients who participate in/or attend ISP, ISP reviews and/or planning meetings.	Service Recipients	Annually	1. ISP's 2. ISP Semi Annual Reviews 3. ISP data base	Development Supervisor	100%	Not met - 85% of service recipients had an ISP.
Maximize number of persons in training to move on to supported community employment.	<i>Effectiveness</i> Number of persons supported who are paid at least minimum wage at a company independent of KDSCL.	Service Recipients	Annually	1. Employment Plans	Development Supervisor	100%	Not met - 9 individuals requested community employment. 2 were placed with community employers. Three received employment with KDSCL enclaves.
Maximize the number of learning opportunities related to the function of the business.	<i>Effectiveness</i> Number of persons who learn skills specific to the business they are attending.	Service Recipients	Annually	1. Post Activity Calendars	Development Supervisor	10 people/ 5 different functions	Goal met - 10 people learned at least 5 different functions.
Maximize opportunities for persons to participate in social recreation and leisure activities and experience citizenship through inclusion in their communities.	<i>Effectiveness</i> Number of non-work related activities provided in the year.	Service Recipients	Annually	1. Post Activity Calendars	Development Supervisor	Individuals participate in 10 different activities.	Goal met - Individuals participated in 21 different activities.

Business Services (continued)

Individuals are safe and secure.	<i>Effectiveness</i> Minimize the amount of preventable incident reports.	Service Recipients	Monthly	Incident reports and incident report follow up forms	Development Supervisor	0	Not met - Larry's Cycle had 0 preventable incidents. KDI Wood shop had 2 preventable incidents which were followed up and action taken to rectify.
Provide services within annual allocated budget.	<i>Efficiency</i> Actual yearly revenue & expenditures.	Day Service	Annually	1. Audited Financial statements	Finance Manager	Surplus	Goal met.
Maximize satisfaction of all persons served.	<i>Service Satisfaction</i> Percent of individuals who express satisfaction with services.	Service Recipients	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	Goal met 100%
Maximize satisfaction of the person's served families.	<i>Family Satisfaction</i> Percent of individuals who express satisfaction with services.	Families	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	Goal Met – 100% satisfaction.
Maximize satisfaction of all stakeholders (Funders, customers, paid caregivers).	<i>Stakeholder Satisfaction</i> Percent of individuals who express satisfaction with services.	Stakeholders and External Influences	Annually	1. Satisfaction surveys 2. Complaints forms	AQAM	90%	Goal met 100% satisfaction.

Integrated Career Opportunities (Employment Services)

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize involvement in personal decision-making and level of independence.	<i>Effectiveness</i> Percent of service recipients who participate in/or attend ISP, ISP reviews and/or planning meetings.	Service Recipients	Annually	1. ISP's 2. ISP Semi Annual Reviews 3. ISP data base	Development Supervisor	100%	Not met - 92% of service recipients had an ISP.
Minimize the number of people who are permanently employed in a KDSCCL enclave or group employment.	<i>Effectiveness</i> Number of individuals who move from enclave/group work to independent paid employment.	Service Recipients	Annually	1. GPITs 2. Employment Plans	Development Supervisor	5	Goal met – 6 people moved from enclave to community employment.
Individuals are safe and secure.	<i>Effectiveness</i> Zero preventable incident reports.	Service Recipients	Monthly	1. Incident reports 2. Incident report follow up forms	Development Supervisor	0	Not met – 1 preventable incident, which was followed up and action taken to rectify.
Provide services within annual allocated budget.	<i>Efficiency</i> Actual yearly revenue & expenditures.	ICO	Annually	1. Audited Financial statements	Finance Manager	Surplus	Goal met.

Integrated Career Opportunities (continued)

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Minimize response time to (for) requests for employment.	Efficiency Decrease the amount of time people wait to have community paid employment opportunities.	Service Recipients	Annually	1. Service Recipient Service Forms	Development Supervisor	35 working days	Not met - Average of 103 working days. Quickest placement 2 days, longest 224. ICO service delivery framework altered mid way through year. Process implemented to create vocational profile. Job seekers then go on priority list, and measurement of length of job search then begins. Previously, measurement began at date of referral to ICO for job search.

Integrated Career Opportunities (continued)

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize satisfaction of all persons served.	<i>Service Satisfaction</i> Percent of individuals who express satisfaction with services.	Service Recipients	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	Goal met - 100% satisfaction.
Maximize satisfaction of the person's served families.	<i>Family Satisfaction</i> Percent of individuals who express satisfaction with services.	Families	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	Goal met - 5 out of 5 parents who gave exit interviews were satisfied with service. No surveys from families returned. Two complaints from parents were resolved to their satisfaction.
Maximize satisfaction of all stakeholders (Funders, customers paid caregivers).	<i>Stakeholder Satisfaction</i> Percent of individuals who express satisfaction with services.	Employers and External Influences	Annually	1. Satisfaction surveys 2. Complaints forms	AQAM	90%	Goal met - 100%

Agency

Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Minimize the time existing and new service recipients wait to access service.	<i>Efficiency</i> Decrease the amount of time people wait to access or increase service.	Service Recipients	Annually	Waitlist/referral form ShareVision	Activity and Development Supervisor	35 working days	Goal met - Average of 27 working days.
Maximize the employment satisfaction of KDSCL staff.	<i>Staff Satisfaction</i> Percentage of individuals who express satisfaction with their employment.	Staff	Annually	1. Satisfaction surveys	AQAM	80%	Goal met - 100%

History

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

1953 - 2007

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 35th 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 2nd 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.

2007: KDSCL continued to pursue replacing the building at 555 Fuller Avenue. The City of Kelowna requirements were actively being addressed with 2 outstanding items at year end. KDSCL secured four new individualized contracts with staff specifically working under the direction of the individual and/or their family. Recruiting and maintaining qualified staff was a huge issue due to the labour market in the Okanagan. Much time was spent trying to hire and orientate new staff. The Day Service continued to expand with increases in referrals. The activity schedule that was established in the prior year was operating in full mode with a variety of recreation and leisure opportunities being offered. Individuals continued to volunteer with other community non-profits and attended several appreciation events through out the year. The evening/weekend social and recreation group participated in many community events including attending hockey, baseball and football games, playing billiards, Parks Alive activities, dinner and a movie, arts classes, etc. The Richter residents went on an Alaskan cruise which they thoroughly enjoyed. ICO continued to provide employment services. Group contract work declined with more emphasis on independent employment. ICO hosted a very successful employer's breakfast in September with many community partners attending. Larry's Cycle and Sports sales increased at the new location. They expanded their clothing line. The KDI Wood Shop had record sales, with individuals continuing to participate in community activities. The officially resurrected Travel Club went to Disneyland, Niagara Falls and hosted a September one week camp at Camp Owaissi. Community Living month celebrations occurred in October with a free BBQ lunch and an evening open house. Sadly, this was also the year that Desmond Hill, Maria Sulzer and Janet Asselstine, long term KDSCL participants, passed away. Chris Jiyobu and Stewart Ritchie both retired. The Kelowna Self advocates attended the BCACL conference in June in Prince George. They produced a video and presented it at a workshop on Rights and Responsibilities. The group continued to meet monthly and worked on issues at both a community and provincial level.

President	Year
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