

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING (KDSCL)

56th ANNUAL REPORT

2008 - 2009

**“CELEBRATING 56 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.

INDEX

- 1. MINUTES OF THE 2008 ANNUAL GENERAL MEETING**
- 2. PRESIDENT'S REPORT**
- 3. TREASURER'S REPORT**
- 4. AUDITOR'S REPORT**
- 5. SELF ADVOCATE'S REPORT**
- 6. SERVICE REPORTS**
- 7. ACTIVITY QUALITY ASSURANCE MANAGER'S REPORT**
- 8. EXECUTIVE DIRECTOR'S REPORT**
- 9. HISTORY**

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

MINUTES OF THE 55th ANNUAL GENERAL MEETING

September 29, 2008, 7:00 pm
555 Fuller Avenue, Kelowna, BC

In attendance: Nick Pisio, Virginia Pisio, Mary Brown, Glenda Mallach, Johanna Poplawski, Bob Hadgraft, Jean Hadgraft, Darlene Hass, Joyce Fontaine, Don Fontaine, Jim Greenlay, Angie Greenlay, Richard Pringle, Arnold Soloway, David Paynter, Daniel Klychuk, Cyndy Omand, Rhonda Campbell, Heidi Deleurme, Christian Lafrance, Leslie Munro, Kelly Tompkins, Susan Harney, Ruth Dodds, Helen Polmear, Charisse Daley, Gail Meier and Murray Rossworn.

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 Richard Pringle seconded by Kelly Tompkins that the agenda be accepted as presented. Carried.**
4. **Moved by Jim Greenlay seconded by Nick Pisio that the minutes of the September 17, 2007 AGM be approved as circulated. Carried.**

5. Auditor's Report: Murray Rossworn from Rossworn Henderson (name change effective July 1, 2008) presented the audited financial statements. He stated the statements reflect aggregated data of transactions accumulated based on a 12 month period ending March 31, 2008. Rossworn Henderson currently audits 5 other organizations identical to KDSCL. He read the 3rd page of the report which is a standard letter provide to all not-for - profits. He stated everything is fine financially with the society. He said the statements appear complicated due to the requirements of all funding masters. Reserve replacements are a requirement of BC Housing. Capital assets relate to building replacements and the operating fund the day-to-day operations of the society. One item not included is the value of a building. The book value tends to be less than fair market value. Statements are conservatively presented. This year's statements are consistent with last years with exceptions of a decline in donations. There is a demand loan currently due on the Sutherland property instead of a mortgage. Accrued sick reserve is a liability though it is unlikely it will totally be utilized. Murray reviewed each page highlighting pertinent information. He stated Generally Accepted Accounting Principle (GAAP) are applied and there are far more reporting rules governing auditing not-for profit organizations than there were in the past. Seventy-seven percent of the society's funding is reliant on government. Gail Meier queried about the building fund replacement which is reflected on page 13 of the statements.

Gail stated that long term Secretary Treasurer, David Low, resigned this year due to professional and family commitments. Mid year Denis Gates was appointed acting Secretary Treasurer however was unable to attend this evening. **Moved by Nick Pisio seconded by David Paynter to accept the 2007/2008 audited financial statements as presented. Carried.**

6. Appointment of the 2007/2008 Auditors: **Moved by David Paynter seconded by Richard Pringle that the board of directors be given the authority to appoint the auditors for the 2008-2009 fiscal year. Carried**

7. President's Report: Gail Meier stated that the report is included in the AGM booklet and reviewed the content. She thanked the board, Charisse and staff for their hard work and dedication to clients of KDSCL. **Moved by Richard Pringle seconded by Nick Pizio that the President's Report be accepted as presented. Carried.**

8. Self-Advocate's Report: Kelly Tompkins read the report provided in the AGM booklet. **Moved by David Paynter seconded by Nick Pizio that the Self Advocate's Report be accepted as presented. Carried.**

9. Election of Officers: Gail stated this is typically completed by the past president however Denis Gates is not available. In his absence she will conduct the elections. She stated the terms of 4 directors have concluded and 4 have allowed their names to stand for re-election for a 3-year term: David Paynter, Jim Greenlay, Kelly Tompkins and Denis Gates. David Paynter and Denis Gates have been continuously elected to the board for five years or three consecutive terms therefore the membership's consent is required in order for them to seek reelection. **Moved by Richard Pringle seconded by Jim Greenlay that David Paynter and Denis Gates be permitted to allow their names to stand for another 3 year term. Carried.** In addition, new member Arnold Soloway is seeking election to the board. Arnold Soloway stated that he was the Treasurer for the ACT/UCT for 5 years, Treasurer for Gallagher's as well as President. He worked for Ford Motors for 31 years. He was the regional manager for Pacific Region, analyzing financial statements/data. He also did consulting work for Price Water House post retirement. Gail called upon the membership three times, requesting nominations from the floor, first call, second call, and third call. With no forthcoming, **Moved by Gail Meier and seconded by Nick Pizio that David Paynter, Jim Greenlay, Kelly Tompkins, Denis Gates and Arnold Soloway be appointed to the KDSCL Board of Director for a three year term. Carried.**

10. Meeting adjourned at 7:45 pm.

President's

Report

PRESIDENT'S REPORT

2008- 2009

It is my pleasure to report on another year of successful events and services at KDSCL.

The board of directors consisting of myself and eight board members continue to meet on a monthly basis. Between meetings, Charisse keeps the board apprised of updates via email and some board business and motions are also conducted by email to address items in a timely fashion.

I continue to meet with Charisse between meetings to sign cheques or documents and keep current with board and society business and activities.

This year the board conducted a series of meeting to craft Strategic Development Plans which are intended to set forth a plan to guide the direction and vision of the society for the next three to five years. Thanks to the board and Charisse for their effort and extra meeting times that went into this process.

Another year has gone by and we are still working on plans for a new building. A significant step towards reaching that goal and funding for the building was achieved when the society won the Juicy radio station \$100,000.00 fund raising Give Away. This project will not only raise the funds but increase our profile in the community. We will continue to fundraise and hopefully be able to start the building in the new year. Thanks to the staff who enthusiastically worked so tirelessly to obtain votes and to win these funds for the association.

This year long time board member Jim Greenlay is stepping down after many years of serving on the board. Many thanks to Jim for all his years of service and the many contributions he (and his wife Angie) made to the association.

I would like to thank Mrs.Hadgraft for all her volunteer work. We truly appreciate her support.

I would also like to thank all the staff, including Charisse, for all their hard work and dedication to the KDSCL. I appreciate the heart Charisse has for KDSCL, our clients and staff. She makes my position so much easier and is such a pleasure to work with

Respectfully submitted by Gail A. Meier

Treasurer's
Report

TREASURER'S REPORT

2008–2009

It is with pleasure that I submit the 2009 Treasurer's Report for the Kelowna and District Society for Community Living for the year ending March 31, 2009. The Audited Financial Statements of KDSCL are prepared by Murray Rossworn Inc.

The Society revenues exceeded expenditures by \$48,532, compared to \$44,639 in 2008. Cash at year end was \$601,821 compared to \$602,182 in 2008.

The administration department is reporting a surplus of \$34,951 compared to a deficiency in 2008. This is a result of increased donation for the year.

Larry's Cycle has a deficiency for the year of \$26,067, an increase over the 2008 deficiency of \$9,832. Revenues declined by \$67,234 for the year as a result of the slower economy. Sales margins increased by 4% over 2008. A continued focus on maintaining margins and expense control should result in improved results for 2010.

The Richter Street Residence is reporting an operating deficiency of \$11,930 for the year. Funding for interior painting and repairs was taken from the replacement reserve account. The account currently has a balance of \$11,757.

The following departments, Integrated Career Opportunities (ICO), the KDI (wood shop), Day Services and Individual Funding all have reported revenues in excess of expenses.

Educational Development and Rental assistance both report that expenses exceeded revenues.

Overall, the management and staff have done an excellent job in controlling expenses while maintaining exceptional levels of service.

I would like to thank Jane Stolz and Rhonda Campbell, our Finance Manager for their dedication too accurately providing the financial records of KDSCL.

Respectfully submitted by Arnold Soloway, Secretary Treasurer

Auditor's Report

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

FINANCIAL STATEMENTS

March 31, 2009
(Audited)

MURRAY ROSSWORN INC.
Chartered Accountants

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

March 31, 2009

CONTENTS	Page
AUDITORS' REPORT	3
FINANCIAL STATEMENTS	
Statement of Financial Position	4
Statement of Financial Activity	5
Statement of Changes in Financial Position	6
Statement of Changes in Replacement Reserve Fund	7
Summary of Significant Accounting Policies	8 - 9
Notes to Financial Statements	10 - 13
Schedule of Revenue & Expenses by Department - current year	14
Schedule of Revenue & Expenses by Department - prior year	15

AUDITORS' REPORT

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

We have audited the Statement of Financial Position of the Kelowna and District Society for Community Living as at March 31, 2009 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, 2009 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 14 - 15 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.



July 17, 2009

Chartered Accountants

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

As at March 31, 2009

	Operating fund	Capital asset fund	Replacement reserve fund	Total 2009	Total 2008
ASSETS					
Current assets					
Cash	\$ 171,679	\$ 4,755	\$	\$ 176,434	\$ 191,237
Term deposits (Note 2)	158,692	246,875		405,567	390,825
Restricted cash (Note 3)	8,063		11,757	19,820	20,121
Accounts receivable	46,946			46,946	68,488
Inventory (Note 4)	137,673			137,673	99,774
Prepaid expenses	28,266	56,100		84,366	23,241
	551,319	307,730	11,757	870,806	793,686
Capital assets (Note 5)		505,532		505,532	470,215
	\$ 551,319	\$ 813,262	\$ 11,757	\$ 1,376,338	\$ 1,263,901
LIABILITIES					
Current liabilities					
Accounts payable	\$ 273,936	\$	\$	\$ 273,936	\$ 223,227
Prepaid deposits	6,084			6,084	
Current portion of long term debt		224,934		224,934	231,196
	280,020	224,934		504,954	454,423
Accrued sick time reserve (Note 6)	259,885			259,885	239,569
Long term debt (Note 7)		5,556		5,556	12,498
	539,905	230,490		770,395	706,490
FUND BALANCES					
Rental assistance program surplus (Note 8)	4,010			4,010	4,604
Invested in capital assets		335,896		335,896	226,521
Externally restricted (Note 3)	8,063		11,757	19,820	20,121
Internally restricted (Note 9)	23,531	246,876		270,407	324,719
Unrestricted	(24,190)			(24,190)	(18,554)
	11,414	582,772	11,757	605,943	557,411
	\$ 551,319	\$ 813,262	\$ 11,757	\$ 1,376,338	\$ 1,263,901

Approved by the Directors:

Director

Director

The accompanying notes are an integral part of the financial statements

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

For the year ended March 31, 2009

	Operating fund	Capital asset fund	Replacement reserve fund	Total 2009	Total 2008
REVENUE					
Community Living BC	\$ 2,095,715	\$	\$	\$ 2,095,715	\$ 1,928,181
Sales	315,465			315,465	407,768
Client rent contributions	101,889			101,889	46,458
BC Housing grant	86,716			86,716	85,034
Other income	59,512			59,512	47,046
Gaming revenue	30,000	2,500		32,500	30,000
United Way	15,000			15,000	23,322
Donations	65,853	9,213		75,066	22,520
Interest	2,103	13,207	159	15,469	13,656
	2,772,253	24,920	159	2,797,332	2,603,985
EXPENSES					
Automotive	59,863			59,863	54,803
Bank charges & interest	4,047	11		4,058	4,355
Cost of goods sold	119,345			119,345	171,175
Incentive allowance	10,242			10,242	19,471
Education and recreation	81,963			81,963	58,277
Food	12,455			12,455	12,220
Insurance	14,836			14,836	13,066
Interest on long term debt	14,272			14,272	15,182
Maintenance and repairs	48,927		1,700	50,627	52,897
Office	38,090			38,090	53,926
Professional fees	11,153			11,153	15,196
Property taxes	2,746			2,746	2,009
Rent	183,866			183,866	116,780
Society expenses	21,270			21,270	14,935
Supplies	27,139			27,139	12,848
Staff development	16,907			16,907	20,894
Telephone and utilities	43,898			43,898	44,360
Wages and benefits	2,008,238			2,008,238	1,855,494
Amortization		29,577		29,577	41,175
	2,719,257	29,588	1,700	2,750,545	2,579,063
Excess (deficiency) of revenue over expenses before the following:	52,996	(4,668)	(1,541)	46,787	24,922
Gain/(loss) on disposal of assets		(7,345)		(7,345)	
Rent subsidy adjustment	9,090			9,090	19,717
Excess (deficiency) of revenue over expenses	62,086	(12,013)	(1,541)	48,532	44,639
Fund balances, beginning	19,819	529,245	8,347	557,411	512,772
INTERFUND TRANSFERS					
Mortgage principal repayments	(13,204)	13,204			
Transfer to capital fund	6,863	(6,863)			
Replacement reserve provision	(4,951)		4,951		
Capital assets acquired	(59,199)	59,199			
Fund balances, ending	\$ 11,414	\$ 582,772	\$ 11,757	\$ 605,943	\$ 557,411

The accompanying notes are an integral part of the financial statements

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

For the year ended March 31, 2009

	Operating fund	Capital asset fund	Replacement reserve fund	Total 2009	Total 2008
Source of cash					
Funding	\$ 2,203,973	\$	\$	\$ 2,203,973	\$ 1,999,812
Sales of service	417,354			417,354	454,226
Interest income	2,103	13,207	158	15,468	13,656
Donations	65,853	9,213		75,066	22,520
Subsidy adjustment	9,090			9,090	19,717
Grants	45,000	2,500		47,500	53,322
Other income	59,512			59,512	46,665
	2,802,885	24,920	158	2,827,963	2,609,918
Uses of cash					
Salaries and benefits	(1,969,051)			(1,969,051)	(1,852,502)
Materials and supplies	(784,880)		(1,700)	(786,580)	(720,889)
Mortgage interest	(16,746)			(16,746)	(17,812)
Mortgage principal Expenditures					
Interfund transfers					
Repayment of mortgage principal	13,204	(13,204)			
Replacement reserve provision	(4,951)		4,951		
Capital assets acquired		(59,199)		(59,199)	
Capital asset disposal		3,252		3,252	
Transferred (to) from other funds	6,863	(6,863)			
Total uses of cash	(2,755,561)	(76,014)	3,251	(2,828,324)	(2,591,203)
Net increase in cash	47,324	(51,094)	3,409	(361)	18,715
Cash, beginning of year	291,110	302,724	8,348	602,182	583,467
Cash, end of year	\$ 338,434	\$ 251,630	\$ 11,757	\$ 601,821	\$ 602,182

Cash consists of:

	Operating fund	Capital asset fund	Replacement reserve fund	Total 2009	Total 2008
Cash	\$ 171,679	\$ 4,755	\$	\$ 176,434	\$ 191,236
Term deposits	158,692	246,875		405,567	390,825
Restricted cash	8,063		11,757	19,820	20,121
Cash, end of year	\$ 338,434	\$ 251,630	\$ 11,757	\$ 601,821	\$ 602,182

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

For the year ended March 31, 2009

	Total 2009	Total 2008
Richter House		
Balance, beginning of year	\$ 8,347	\$ 10,281
Add:		
Replacement reserve provision	4,951	4,951
Interest income	159	90
Less:		
Expenditures	(1,700)	(6,975)
Balance, end of year	\$ 11,757	\$ 8,347

Capital replacement for the year consists :

Paint and repair interior	1,700	6,975
---------------------------	--------------	--------------

The accompanying notes are an integral part of the financial statements

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

For the year ended March 31, 2009

PURPOSE OF THE SOCIETY

The Kelowna and 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 term deposits is recognized as revenue in the appropriate fund in the period the investment income is earned.

c) Inventory

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

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.

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

For the year ended March 31, 2009

e) Financial instruments

All financial instruments are measured in the statement of financial position at fair value except for loans and receivables, held to maturity investments and other financial liabilities measured at the amortized cost. The Society designated its financial assets and liabilities as follows:

Cash, which includes operating bank accounts, term deposits, and the gaming bank account, is designated as held for trading and measured at fair value, with changes in fair value recognized in net earnings;

Accounts receivable are classified as loans and receivables and are measured at the amortized cost;

Accounts payable and accrued liabilities, deferred revenue, and long-term debt are classified as other financial liabilities and are measured at amortized cost.

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

For the year ended March 31, 2009

2. TERM DEPOSITS

	2009	2008
Operating fund		
Term deposit including accrued interest at 3.15% per annum maturing October 27, 2009	\$ 100,595	\$ 97,503
Due from capital fund	58,097	
	<u>158,692</u>	<u>97,503</u>
Reserve fund		
Term deposit including accrued interest at 3% per annum maturing May 30, 2010	52,532	50,997
Term deposit including accrued interest at 4.15% per annum maturing July 7, 2009	252,440	242,325
Due to operating fund	(58,097)	
	<u>246,875</u>	<u>293,322</u>
	<u>\$ 405,567</u>	<u>\$ 390,825</u>

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.

	2009	2008
Replacement reserve	\$ 11,757	\$ 8,347
Bingo funds	8,063	11,774
	<u>\$ 19,820</u>	<u>\$ 20,121</u>

4. INVENTORY

	2009	2008
Larry's Cycle	\$ 130,777	\$ 91,149
Woodshop	6,896	8,625
	<u>\$ 137,673</u>	<u>\$ 99,774</u>

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

For the year ended March 31, 2009

5. CAPITAL ASSETS

	Cost	Accumulated amortization	Net Book Value 2009	Net Book Value 2008
Land	\$ 191,513	\$	\$ 191,513	\$ 191,513
Buildings - Workshop	352,135	219,932	132,203	139,868
Buildings under construction	68,810		68,810	44,153
Equipment	188,225	170,483	17,742	22,492
Automotive	191,710	125,397	66,313	39,900
Group Home	108,746	80,141	28,605	31,600
Leasehold improvements	7,152	6,806	346	689
	\$1,108,291	\$ 602,759	\$ 505,532	\$ 470,215

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 \$259,885 as at March 31, 2009 (2008 - \$239,569). These benefits are not paid out upon termination and any unpaid amounts revert to the Society.

7. LONG TERM DEBT

	2009	2008
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.	\$ 12,280	\$ 18,657
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.	218,210	225,037
	230,490	243,694
Less: current portion due within one year	224,934	231,196
	\$ 5,556	\$ 12,498

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
2010	\$ 218,210	\$ 6,724	\$ 224,934
2011		5,556	5,556
	\$ 218,210	\$ 12,280	\$ 230,490

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

For the year ended March 31, 2009

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.

	2009	2008
Deficit, beginning of year	\$ 4,604	\$ (15,993)
Excess (deficiency) of revenues over expenditures	(9,684)	880
Rent subsidy adjustment	9,090	19,717
	<u>\$ 4,010</u>	<u>\$ 4,604</u>

9. INTERNALLY RESTRICTED ASSETS

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

	2009	2008
Restricted for capital purchases	\$ 246,876	\$ 302,724
Restricted for expenditures at the board's discretion	23,531	21,995
	<u>\$ 270,407</u>	<u>\$ 324,719</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.

The Society is a member of Health Benefit Trust. The Trust provides benefits to over 582 healthcare and community services employers in BC and covers over 85,500 employees. As at December 31, 2008, 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, 2010. 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 2012. Monthly payments required under this agreement are approximately \$206.09.

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

For the year ended March 31, 2009

11. FINANCIAL INSTRUMENTS

- a) The fair value of financial assets and liabilities are as follows:

The carrying values of cash, term deposits, accounts receivable, accounts payable and accrued liabilities, and deferred revenue approximate their carrying values, due to the relatively short periods to maturity.

The carrying value of long-term debt approximates fair value as the terms and conditions of the borrowing arrangements are comparable to current market terms and conditions of similar debt instruments.

- b) Credit risk exposure

The maximum credit risk exposure for all of the Society's current financial assets is the carrying value of those assets.

It is management's opinion that the Society is not exposed to significant interest, currency or credit risks arising from these financial instruments.

12. ECONOMIC DEPENDENCE

The Society receives approximately 76.4% (2008 - 74.6%) of total revenues from Community Living British Columbia.

13. COMPARATIVE FIGURES

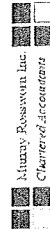
Certain comparative figures have been reclassified to conform to the accounting presentation adopted for the current year.

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING
SCHEDULE OF REVENUE AND EXPENSES BY DEPARTMENT
(Unaudited)

For the year ended March 31, 2009

Schedule 1

	Administration	Larry's Cycle	Richter	ICO	Woodshop	Day Service	Individual funding	Educational development	Rent assist	Transfer to other funds	2009
Revenue											
CLBC	\$	\$ 146,192	\$ 244,680	\$ 365,479	\$ 121,827	\$ 1,043,781	\$ 173,756	\$	\$	\$	\$ 2,095,715
Sales		178,131	36,000	79,906	38,436	18,992			65,889		315,465
Client rent contributions			7,663						79,053		101,889
BC Housing Grant											86,716
Other income	3,096	450			12,000			43,088		878	59,512
Gaming revenue								30,000		2,500	32,500
United Way						15,000					15,000
Donations	60,038			5,775				40		9,213	75,066
Interest	2,104									13,365	15,469
	65,238	324,773	288,343	451,160	172,263	1,077,773	173,756	73,128	144,942	25,956	2,797,332
Expenditures											
Administration charge	(167,679)	12,426	20,798	31,066	10,355	84,223	8,811			29,577	29,577
Amortization											59,863
Automotive	857	1,190	4,543	25,129	957	20,548	5,492	1,147		11	4,058
Bank charges and interest	825	3,222									119,345
Cost of goods sold		106,740		8,442	4,163						81,963
Education & recreation	7,122	1,172	659	1,607	1,424	20,375		49,604			12,455
Food			12,455								10,242
Incentive allowance		4,121		(4)	6,354	(229)					14,272
Insurance	8,744	1,761	2,340			1,991					14,836
Interest on long term debt			575			13,697					50,627
Maintenance and repairs	16,254	4,369	1,132	4,131	7,144	15,897				1,700	38,090
Office and miscellaneous	13,985	11,451	813	3,172	1,607	5,424		1,638			11,153
Professional fees	9,400		967						786		2,746
Property tax	70		2,358			318					183,866
Rent	(85,200)	33,526		18,000	33,600	33,600			150,340		21,270
Society expenses	6,191	1,769	1,033	4,116	1,027	7,134					16,907
Staff development	2,623	2,395	1,009	2,005	670	8,205					27,139
Supplies		1,136	387	1,208	2,175	2,210	20,023				43,898
Telephone and utilities	18,689	9,063	5,030	1,870	4,172	5,074					2,008,238
Wages and benefits	198,406	156,498	246,174	314,804	93,823	844,967	125,659	24,407	3,500		
	30,287	350,839	300,273	415,546	167,471	1,063,434	159,985	76,796	154,626	31,288	2,750,545
Excess (deficiency)	\$	\$ 34,951	\$ (11,930)	\$ 35,614	\$ 4,792	\$ 14,339	\$ 13,771	\$ (3,668)	\$ (9,684)	\$ (5,332)	\$ 46,787



KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING
SCHEDULE OF REVENUE AND EXPENSES BY DEPARTMENT
(Unaudited)

For the year ended March 31, 2008

Schedule 2

	Administration	Larry's Cycle	Richter	ICO	Woodshop	Day Service	Individual funding	Educational development	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	17,928			74,443		407,768
BC Housing Grant			10,591								85,034
Donations	2,803					8,849				10,868	22,520
Client rent contributions									46,458		46,458
Other income	7,442	600			13,211	25,793					47,046
Bingo revenue						30,000					30,000
United Way						23,322					23,322
Interest	3,765									9,891	13,656
	14,010	392,007	249,306	456,233	204,564	1,055,174	91,031		120,901	20,759	2,603,985
Expenditures											
Administration charge	(157,800)	11,940	20,292	31,308	11,940	77,460	4,860				41,175
Amortization	6,501	1,649	654	8,929	273	16,599		6,570			54,803
Automotive	814	4,783	2,213	18,945	3,409	20,272	4,367			38	4,355
Bank charges and interest	798	3,519									58,277
Client education, recreation		1,309	812	1,997	1,187	52,972					19,471
Client incentive allowance		3,782		205	6,652	8,832					12,220
Cost of goods sold		159,583		3,089	8,503						171,175
Food			12,220								12,220
Insurance	7,080	1,715	2,307			1,964					13,066
Interest on long term debt			1,041			14,141					15,182
Maintenance and repairs	16,734	4,853	2,951	3,529	5,684	12,171			6,975		52,897
Office and miscellaneous	12,001	16,010	2,105	7,291	3,563	12,956					53,926
Professional fees	13,800								1,396		15,196
Property tax	188		2,161			(340)					2,009
Rent	(85,200)	34,155	(36,000)	18,000	33,600	33,600			118,625		116,780
Society expenses	7,395	593	490	1,653	539	4,265					14,935
Staff development	1,923	1,873	1,498	6,041	2,019	7,540					20,894
Supplies		1,790	1,543	1,286	1,763	6,466					12,848
Telephone and utilities	19,663	8,633	5,016	1,890	4,161	4,997					44,360
Wages and benefits	178,702	145,652	229,802	326,576	91,433	800,017	83,312				1,855,494
	22,599	401,839	249,105	430,739	174,726	1,073,912	92,539	6,570	120,021	7,013	2,579,063
Excess (deficiency)	\$ (8,589)	\$ (9,832)	\$ 201	\$ 25,494	\$ 29,838	\$ (18,738)	\$ (1,508)	\$ (6,570)	\$ 880	\$ 13,746	\$ 24,922

Self-Advocate's Report

SELF ADVOCATE'S REPORTS

2008 – 2009

At the beginning of this year, we had Michael Douglas come and help the self advocates to decide what they want to work on for the year. One of the suggestions was to get another advisor due to the present ones being busy. We talked about what we want in an advisor: such as needing some one to help us keep on track and keep the meetings running smoothly. We want help to become more visible in our community.

Earlier this year we had hoped to have our new adviser in place by the beginning of September of 2009. Goals we have established are that one day we could eventually run our own meetings and become a non-profit organization. We would like to get out and be an active part of our community, as well, to grow and expand in members. We would like to see other self advocates become active in their communities throughout the Okanagan. We would like to focus on our abilities not just on our disabilities. We would like to be a positive part of our community.

At this time we would like to welcome Allison McNeill as our new advisor. We look forward to working with her and becoming stronger members of society.

This past year we volunteered at the Canada Day celebrations and painted an apple box. We must say the box looked great.

By Shelley C. DeCoste and Kelly Tompkins

ADVOCACY IN THE SERVICE SITES

Advocacy in the Service Site meetings strive to gather information for attending service recipients, in order to better serve individuals in all departments of KDSCL. Feedback provided by recipients is very helpful. The group represents itself as an advocating body for the rest of the recipients in all other departments. Individuals are encouraged to engage in conversation with each other, with guests and staff when providing feedback or answering questions that pertain to the quality of service that is delivered.

During meetings which are held on the last Monday of the month, individuals review old business, and provide a detailed report on service (they receive) from the departments they represent. Ten meetings are held each year.

Recipients have an opportunity to share new ideas or information they may have. New business allows individuals to discuss feedback, concerns, progress, or events. Individuals are then encouraged to discuss their thoughts and opinions on matters of fair treatment, rights and any concerns they may have.

Minutes from these meetings are then circulated to all departments. The information gathered is beneficial as it leads to the creation of an even flow of service throughout KDSCL.

Advocacy in the Service Site meetings will continue to gather feedback in order to improve the relationships between recipients and KDSCL staff. Meetings will continue to ensure that quality service is provided.

By Shelley C. DeCoste and Lisa Milligan

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, life skills, 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.

Independent Living

Provides assistance to individuals to enable them to live independently in their own homes.

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 supported employment in community and through group work by teaching individuals the skills necessary to find, secure and maintain the employment of their choice. Services offer assessments, education, planning (discovery), skill development, support, on-site training and job coaching, monitoring, follow up and the retention required to find and maintain long term employment.

Service specifically develop knowledge and skills in employment, life skills, safety, socialization and community participation

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 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. 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.

Discovery: Is a process that builds a foundation of accurate and useful information for a person requesting employment. It allows the job seeker to share information, for staff to compile that information in a way that determines the best job match. The information creates a person centered marketing plan for employment.

Effective/Revision Date

May 30, 2005
March 27, 2006
June 18, 2007
July 21, 2008
May 11, 2009

Board Approval



Date Approved

May 30, 2005
March 27, 2006
June 18, 2007
July 21, 2008
May 11, 2009

ACTIVITY SERVICE

2008-2009

The KDSCL Activity Service continued to provide opportunities for individuals to become involved in our community in a variety of ways which included joining community activities, increased volunteer time and an effort to participate in more integrated services. Over the course of the year on average eighty-seven (87) people attended. Services were provided in community, at 555 Fuller Avenue and 925 Sutherland Street.

The activity registration form continued to be the best way for individuals to have a say in what they would like to do and when to do it. The scheduling committee met regularly to fine tune the schedule and ensured individuals were getting the activities they had requested. The curriculums set up for each activity was a valuable tool as it assisted in shortening the preparation time and provided feedback for participation and enjoyment to the individuals who had signed up for the activity. We expanded our activities to include the new sport of Frisbee golf and geo-caching. Our photography class is learning all aspects of taking pictures from still-life to angles and shadows. We hope to have some finished albums and scrapbooks completed to keep a record of everyone's accomplishments.

The volunteer time at some of our placements was increased so that we could spend more hours with the individuals in those areas and with the animals at the SPCA. We increased service hours at Windsor Manor, Village at Mill Creek, Compassionate Canada and the SPCA. We had thirty four (34) individuals put in three thousand two hundred and ten (3,210) volunteer hours. We are extremely proud of our volunteers who continued to go into the community and help others. We have two individuals who are totally independent in their placements and one individual who just needs a little bit of support.

We were very proud and pleased that we had an Exemplary given to the Activity Service by the Accreditation team when they were here last November. Exemplary is not given out often so we are quite proud of ours. Kudos to all the staff for their great support in finding ways we could participate within the community. Approximately 90% of our activities were community based and 54% of those were integrated. Inclusion is a very active goal for the society and we strive to accomplish it daily.

The evening weekend leisure and recreational service was again very popular and the number of different activities went from fifty-six (56) up to seventy-six (76). We had forty-eight (48) individuals participate. The variety ranged from hockey games, theatre productions, to having guests come to KDSCL i.e. the drumming. The other change was having individuals invite people to their homes for movie night or a barbeque. This was a great way to increase their socialization skills plus be the host or hostess in their own homes. Events were planned that were not supported by a staff and some of these evenings were attended regularly by individuals who liked to play pool or go to a movie. The goal was to provide two or three evenings per month without staff support. Some

individuals chose not to attend as they felt more comfortable with a staff person. We will strive to offer a variety of activities which encourage individuals to participate without staff support.

The KDSCL Travel Club continued to be popular. We went to a shorter timeline so that we could make changes within the year. We requested individuals get passports so that we could take advantage of travel deals. We made our first trip to Florida, Disneyworld and a Caribbean Cruise in October. It was a long trip but enjoyed by everyone. We did a shorter trip to Tofino and Ucluelet and went on a bus trip last December for the festive Leavenworth Christmas light-up. We reviewed and changed the Travel Policy to make sure all areas of support and individual information was covered.

Camp Owaissi was as usual a big success and KDSCL celebrated a birthday at camp. Parents and caregivers were treated to a wonderful barbeque which included cake and a sing along on the beach. We held a very successful spring tea and open house, attended by many parents and caregivers. Our drama group entertained the crowd with a funny fashion show which brought lots of laughter from the audience. It was so nice to see some new faces at one of our invitational events.

Respectfully submitted by Susan Harney, Activity Supervisor

INTEGRATED CAREER OPPORTUNITIES (ICO)

2008 – 2009

Employment is the buzz word in community as it is at ICO. People are talking about their jobs, those of others or the ones they'd like to have. ICO staff work to make the employment buzz a reality. Over the last year there have been several employment initiatives that our society has put forth proposals for, they include Customized Employment – Charisse and Leslie presented our proposal to CLBC in an interview format and although we met the entire criterion required by the bid we were not successful in securing these funds. The other initiative we chose to bid on was through the Vancouver Foundation. This proposal was to develop disability supports for youth employment through supporting teens that are still in school to find part-time employment, do discovery and make employment contacts. We had submitted a letter of intent and then were asked to submit a full proposal by August 12, 2009.

Lisa Milligan began her position as Community Placement Developer (CPD) for Employment in August of 2008. Ellen Voth began her position as CPD for Intake in June 2008. Our office has been organized so that Ellen handles all the intake and Individual Service Plans, allowing Lisa to dedicate more time to the task of seeking and securing employment for individuals.

Staff within ICO has had the opportunity over the last year to attend the following learning and professional development sessions: Myers Briggs in February, Employment Seminar in March, From Inclusion to Belonging in April, Access to Work in February, Customized Employment, Inclusion and Accessibility and Get on the Train Employment Seminars in May and the BCACL conference in June.

Over the past year we have continued to keep our focus on the goals identified by the people we support. This may have required assisting people to better understand what their goals are through either the Discovery process or job shadowing.

Over the last accreditation year ICO provided service to 72 people. Twenty-five (25) people were assisted in searching for employment. There were (25) new employment placements, thirteen (13) with community employers, twelve (12) with KDSCS work crews and contracts. Twenty-eight (28) people received job coaching and /or assistance in maintaining their employment.

Individuals identified to us that they have life skills goals that may or may not be associated with employment. ICO staff work as life skills coaches with respect to developing such skills as finance management, driver's education, passport and BC Identification, Anger Management, Housing issues, WHIMIS courses, forklift certification, food safe, school registration, personal hygiene, time management, appointment keeping, seeking birth parents (adoption reunion registry), transit training, etc.

We continue to support people in community work settings. These include: Okanagan College, University of British Columbia, Cancer Clinic, Community recycling which includes: Advance Precast, Bounty Cellars, Boston Pizza, Kia and Napa Kelowna. We also continue to support individuals in the community bottle recycle areas of Columbia Bottles, Enviro Technical and Cato.

Individuals are community employed at the following locations: David Paynter Orchards, UBCO Aramark, National Car Rental, Freddy's Brew Pub, Wal-Mart, Lifestyle Condos, Community Living BC, Little Caesar's, KDSCL janitorial and cleanup and the Daily Courier.

Respectfully submitted by Mark Wengrowich, Development Supervisor.

BUSINESS SERVICES

2008 - 2009

KELOWNA DIVERSIFIED INDUSTRIES (KDI) WOOD SHOP

The KDI Wood Shop has had a steady flow of work even in time of a recession. Individuals whom work in the wood shop have been able to work on alternative projects such as: birdhouses, picnic tables, and planter boxes. The wood shop has approximately provided services for nineteen (19) individuals throughout the year, and is continually to employ 1 paid part time employee. On top of obtaining new skills in woodwork, individuals have formed friendships and social connections that seem to make work enjoyable.

Social activities have been something that the wood shop has made time for this year. Individuals have had the opportunity to attend events like the Armstrong Fair, a horse sleigh ride and sit skiing in the winter season, the Tim Horton's hockey tournament, and a possible trip to Atlantis Waterside Park in Vernon. The wood shop group have utilized recreational swimming facilities throughout the area which include: Johnson Bentley in West Kelowna, Parkinson Recreation Center, and the newly built H2O pool in the mission.

The following goals have been something the wood shop and individuals that in it have been striving for: 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 continues to be busy with current contracts and walk-ins. The wood shop is proud to be 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 has taken great pride in their workmanship, and will try to best meet the expectations of the community.

Report provided by Scott Dionne

LARRY'S CYCLE AND SPORT

Larry's Cycle and Sport has been at this location now for three strong years. During this time Larry's has seen changes in retail, service recipients and staff. Larry's now has 21 individuals that participate.

Larry's Cycle staff holds regular meetings with the executive director to get fresh ideas to stay on top of the bicycle market, as well as input from the service recipients we support.

Prior to the start of the summer, Larry's had the opportunity to hire two summer students through the "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 their skills and interest in retail and bike mechanics.

Larry's broadened its resourcefulness, and used various advertising campaigns, such as Castanet and the Capital News to heighten the community's awareness that Larry's Cycle is a Professional Bike Shop.

We also participate as a sponsor in the city of Kelowna's "Bike to Work Week" program and also in Lake Country Canada Day Celebrations. During both of these events we had our Larry's Cycle tent set up to provide tune-ups and various repairs.

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, H2O swim center, and various trail rides around the city, to mention a few. Larry's Cycle also picks up bikes for the City of Kelowna's Stolen and Found bike program; retrieved bikes are then they are taken to the KDI Wood Shop for further processing.

Lastly, feel free to check out Larry's Cycles web page at www.larryscycle.ca.

Respectfully submitted by Shane Milligan and Rod Oranchuk

RESIDENTIAL SERVICES

2008-2009

RICHTER STREET

Mexico, Vancouver, Edmonton, Leavenworth, Camp Owassi, Disney World Florida, Caribbean cruise.....and the list could go on but these were the places the residents of Richter Street had chosen for vacations this year. Everyone was able to get away for a vacation of their choice. This summer everyone vacationed together at Jewel Lake in a beautiful lake side home.

Routines continue as designed by the residents and their support staff. Events and activities are planned with individuals and staff supports each person to fulfill their requests.

We have had several staff leave the house this year and have had others replace them. Brett moved on to employment as a social worker for Interior Health and Murray is currently working as a job coach in ICO. Change isn't a negative thing when everything else remains consistent and our evening and night staff has remained consistent for years.

The repair work that was required at this time last year, to Jeffrey's room, has been completed and is now in good repair. The yard will require that the bushes in the front be removed as they have winter killed and no longer grow.

The society continues to plan for the future of the Richter Residence and continue to work towards a residence more conducive to the needs of the individuals living there. Health issues for individuals are always a concern and staff diligently supports individuals to remain in good health through attending appointments and supporting individuals to live healthy lifestyles.

APARTMENT SUBSIDY

In the past year our subsidized housing service had no changes. KDSCL continues to support individuals in scattered addresses within the city limits of Kelowna and West Kelowna.

People in receipt of rental subsidies are required to pay a portion of their rent as determined by BC Housing. Individuals pay their portion of the rent to KDSCL; KDSCL receives the subsidized portion from BC Housing and makes the full payment to the landlord on behalf of the subsidy recipient.

The Society will also assist individuals in understanding the rights they have as tenants and will advise regarding disputes and resources available to them in dispute.

Respectfully submitted by Mark Wengrowich, Development Supervisor

*Executive Director's
Report*

EXECUTIVE DIRECTOR'S REPORT

2008 – 2009

It was an amazing year which can be characterized by recovery, rejuvenation and celebration!

Leslie Munro was hired permanently into the Activity Quality Assurance Manager's (AQAM) position. She did a phenomenal job under difficult circumstances preparing KDSCL for our second accreditation survey. The results exceeded our expectations; KDSCL was in 95% compliance with all CARF's standards. Leslie must be commended for embracing the challenge with motivating, enthusiasm and complete competency.

Staffing which has been a significant issue for the last few years stabilized. We were very fortunate to suspend casual hiring and were able to accommodate staffing replacement needs as required. We hope the trend continues!

Many staff had the opportunity to attend various conferences and training throughout the reporting period. In addition, at the KDSCL staff in-service in February, the Myers Briggs assessment was completed by all. The assessment identified individual's personality types, how each person's specific type impacts their actions and how those actions affect the culture at KDSCL. Many felt that it was very insightful and when the knowledge is applied creates a more cohesive work environment.

The KDSCL Leadership team (Leslie Munro-AQAM, Rhonda Campbell-Finance Manager, Susan Harney-Activity Supervisor and Mark Wengrowich-Development Supervisor) began a leadership development program. The team under the guidance of a facilitator has been working through various exercises to hone and develop the skill needed to lead a progressive, thoughtful organization. The process has been valuable, enabling the team to evaluate and capitalize on our individual and collective strengths and abilities.

In early November, the board of directors completed an organization strategic plan with much of the focus on the building replacement project. Steps were taken unsuccessfully to recruit a fund raiser or campaign chair which resulted in further delays. A second strategic plan was completed in April that was more comprehensive and focused on the organization as whole. We continue to work at achieving the goals from both plans and anticipate having a definitive building date by the year's end.

In March, the union approved my participation on a travel club trip. I had the opportunity to go to Mexico with a fantastic group. It was very enjoyable and definitely reaffirmed how important it is for everyone to have an annual holiday and how hard our staff work to ensure individuals have fun and are able to make the most of their vacation.

In December, the activity service took over publishing the KDSCL Newsletter. They revamped the format and enhanced the content. The new and improved Newsletter has received much praise and is being hailed as more informative and entertaining. Thank you Jeremy Thompson and Nicole Smith who were ultimately responsible for the transformation.

Likely the most exciting accomplishment of the year was winning the Juicy Give. Fifty-three not-for-profit organizations participated in a contest sponsored by our local radio station, the Juice. Organizations submitted projects that need funding and the community voted via the internet for the project they felt was most in need. The organization that won, the Juice committed to raising a minimum of \$100,000 for and provide \$50,000 worth of free advertising. Everyone worked so hard campaigning and we had so much support both internally and from the community at large. I have to take this opportunity to again thank everyone including the Juice (Vista Radio) for creating this wonderful opportunity; it was huge undertaking with momentous results!

Much success was achieved in all our service areas as you read in the previous reports. I am so proud to be part of an organization that is so respectful and committed to quality service delivery and progressing the rights of the people we serve. It was a fantastic year and in closing I want to thank, as I have in previous reports, the many individuals and group that make KDSCL such a great organization:

- * The staff including, management and supervisory personnel; without their passion and commitment we would not have had such an amazing, stellar year!

- * The Board of Directors for their stewardship, guidance and encouragement. They work diligently to ensure quality systems are in place to support all facets of a progressive, inclusive organization.

- * Mrs. Hadgraft who continues to unselfishly volunteer her time in the activity service and has been a great support to me. She is constantly looking for ways and generating ideas to move the building project forward.

- * The Kelowna Self-Advocates Caucus, though they were rebuilding, they continued their efforts at creating inclusive communities.

- * The United Way for their continued commitment to KDSCL and other community organizations to assist some of our most vulnerable citizens.

- * The Vipond Golf Tournament coordinators, participants and the Kelowna Golf and Country Club for continuing to host this annual event. Their generosity enabled KDSCL to purchase a new lift van this year.

- * The many families, individual community members, community partners (CLBC, BC Housing, the Ministry of Housing and Social Development and Interior Health) who work in partnership with our organization to serve our community.

Respectfully submitted by Charisse Daley

*Activity Quality Assurance
Manager's
Report*

ACTIVITIES QUALITY ASSURANCE MANAGER

2008 - 2009

To say that this has been a busy year would be an understatement. Beginning with the preparations for the CARF Accreditation Resurvey, and ending with the "Juicy Give" this year has certainly been eventful.

All KDSCL staff, volunteers, and service recipients pulled together to prepare for the CARF Resurvey. Prior to November 19, all Society records for the past 3 years were scrutinized. All procedures were reviewed to ensure compliance with CARF standards. A staff in-service was held in September to discuss the accreditation process, and to run through emergency response procedures to ensure all eventualities were covered. Everyone helped out with tidying up the facilities. Finally the CARF surveyors arrived on November 19 and carried out their survey until November 21. KDSCL received several recommendations regarding policy, strategic planning, the Individual Service Plan form, and outcomes measurement. There were no service delivery recommendations. We received an exemplary in the area of community integration. The surveyors were also very impressed with the partnerships that have been forged between ICO and UBCO, OK College, and Columbia Bottle Depot. There were no recommendations in Health and Safety, and an exemplary was given for the Risk Management Assessments which was designed several years ago by Leigh Edwards. Since November, all recommendations have been satisfied by amending and adding to current practices.

The Occupational Health and Safety Committee for KDSCL had a very productive year. The committee was chaired by Mike Varga. Staff members on the committee included Wayne Major, Darlene Hass, D'Arcy Bell and Shane Milligan. Service Recipients were represented by Holly Wilson. Management represented by Leslie Munro. This group conducts two safety reviews of facilities each year, one accessibility review, and one preventing violence in the workplace review. The committee is then responsible for following up on actions required to make facilities and services safe for service recipients, staff and visitors. The contributions of this committee are greatly appreciated.

Staff is KDSCL's greatest resource. After the Board of Directors and Management gathers input, and generates plans, it is invariably the staff who carry out plans while providing consistent support to the people we serve. This year staff have come up with and carried out wonderful improvements to services. The Scheduling Committee at Activity Services came up with a schedule that had over 90% of activities happening outside of KDSCL facilities. The ICO staff (Lisa Milligan) came up with the idea of "Power Hour" to address the concern that staff from different services are not able to exchange information often enough. Business Services staff ensured that 33 community based activities were offered to participants as well as business based activities.

Individualized Funding staff began to meet as a group to exchange updates and ideas. Richter Street staff ensured that the people who live at Richter had opportunities to socialize with people outside of the home (easily surpassing outcome goals that had been set).

The following report outlines KDSCL's outputs and outcomes for the year. Please bear in mind all the hours and effort that staff put into providing the caring, responsive and relevant services that these tables, graphs and outcome measure represent.

Respectfully submitted by Leslie Munro

Demographics

From July 1, 2008 - June 30, 2009 KDSCL served 153 people (not including BC Housing apartment subsidy program). 80 of these individuals were men, 73 were women.

	Under 19	19 - 25	26 - 35	36 - 45	46 - 65	65+
Men	0	12	21	21	24	2
Women	0	12	17	24	18	2

Participation in Services

ICO 72

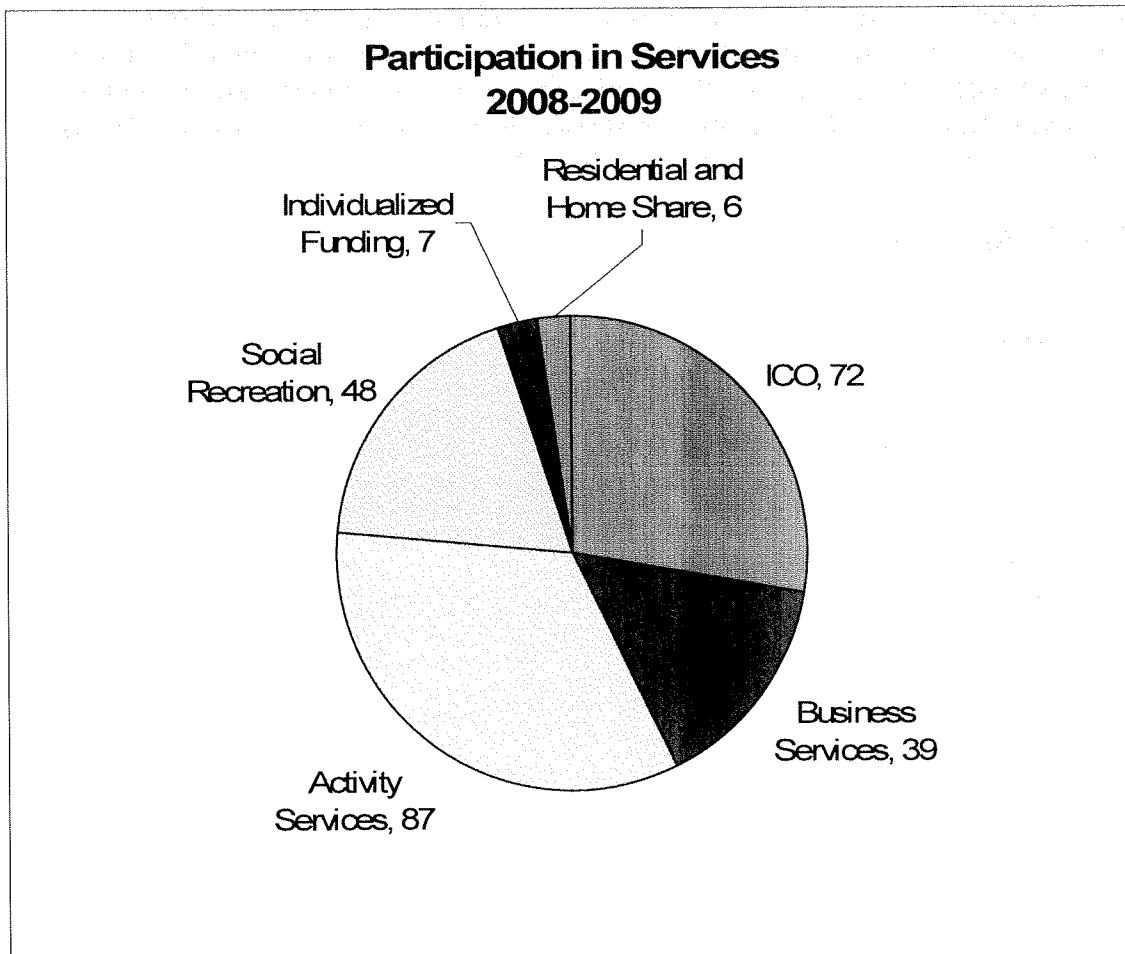
Business Services 39

Activity Services 87

Social Recreation 48

Individualized Funding 7

Residential and Home Share 6



The Quality Assurance year at KDSCL runs from July 1 through June 30. The following statistics are as of June 30, 2009.

Exits from service

14 people exited from services for the following reasons:

Moved	1
Irregular attendance	6
Referral to another agency	1
ICO follow-up*	6

*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.

Waitlist

3 people waiting. Two of the referrals were made in June 2008, and the application process was still underway at year end (June 30). The other referral had been received April 29, 2009. Application information was sent the same day, and then a reminder was sent to the applicant on May 26. The application process had not been completed as of June 30.

Internal requests for service

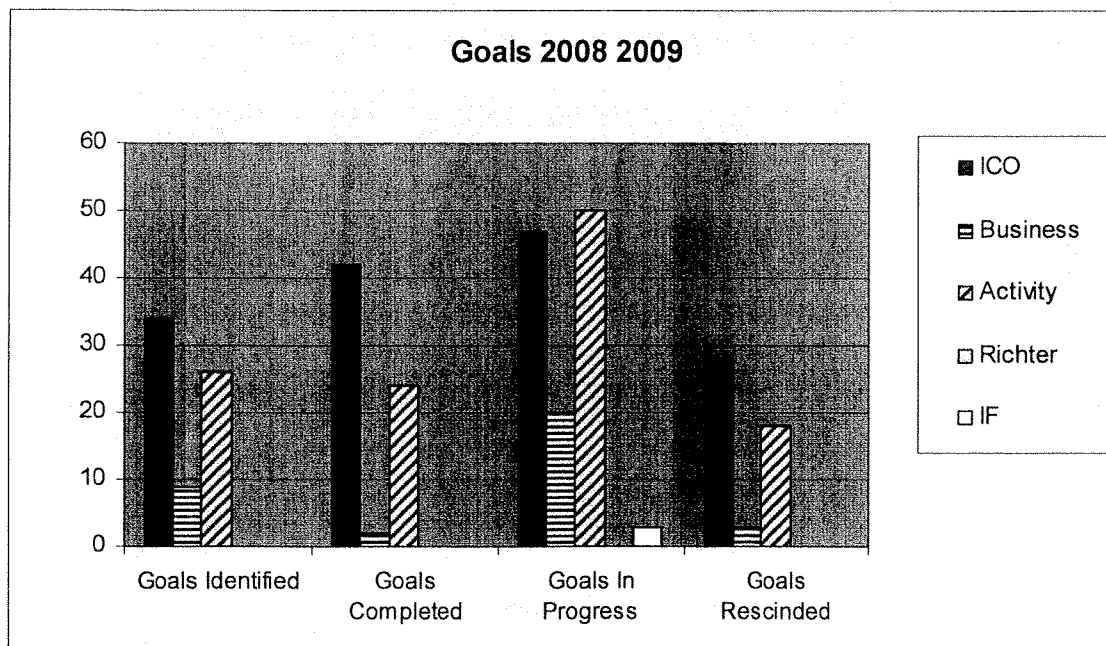
ICO	6
Activity Services	16
Business Services	10

People entering services

ICO	4
Activity Services	3
Business Services	1

Goals identified, completed, in progress and rescinded

	Goals Identified	Goals Completed	Goals In Progress	Goals Rescinded
ICO	34	42	47	28
Business	9	2	20	3
Activity	26	24	50	18
Richter			0	0
IF			3	
	69	68	120	49



Satisfaction Surveys

In May 464 Surveys were sent to service recipients, families, caregivers, funders and customers. 148 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.

Surveys were sent to Service Recipients in each of KDSCL's areas of service for a total of 219 surveys. The following is a breakdown by area of Service recipients who responded to the survey and indicates satisfaction levels through their answers to 18 questions asked. Some surveys contained more than one answer to a question, some questions were not answered.								
	Day							
	Service	ICO	Evening	Larry's	KDI	Richter	I.F.	Total
Sent	78	56	41	17	17	5	5	219
Received	33	10	11	4	3	5	1	67
Satisfaction: "Are you happy with the quality of services provided?"	97.0%	100.0%	100.0%	75.0%	100.0%	100.0%	100.0%	
%Service Recipient Response	42.3%	17.9%	26.8%	23.5%	17.6%	100.0%	20.0%	30.6%

Service Recipient Satisfaction Survey - 2008 - 2009			
	No	Yes	N/A*
1. Are you happy with the service?	2	65	0
2. Do you like the activities you do when you are there?	4	61	2
3. Do KDSCL staff treat you with respect?	2	65	0
4. Do KDSCL staff treat you nicely?	2	65	0
5. Do KDSCL staff listen to your questions and concerns?	2	64	1
6. Are your concerns addressed?	3	62	2
7. Do our hours of service meet your needs?	2	64	1
8. Have you had an ISP planning meeting?	6	57	4
9. Did you like your ISP (planning meeting)?	2	59	6
10. Do KDSCL staff ask you what your goals are?	2	63	1
11. Do KDSCL staff ask help you reach your goals?	1	63	2
12. Do you take part in community activities as often as you would like? If not, why?	6	57	4
13. Do you feel safe at KDSCL?	2	62	3
14. Do you know your rights and responsibilities?	2	60	5
15. Do KDSCL staff talk to you about your rights?	6	55	6
*N/A = No Answer Given			

Family Satisfaction Survey 2008 - 2009								
Surveys were sent to families in each of KDSCL's areas of service for a total of 122 surveys. The following is a breakdown by area of families who responded to the survey and indicates satisfaction levels through their answers to 23 questions asked. Some surveys contained more than one answer to a question, some questions were not answered.								
	Day							
	Service	ICO	Evening	Larry's	KDI	Richter	I.F.	Total
Sent	43	27	23	11	10	5	3	122
Received	17	8	6	2	4	3	1	41
%								
Satisfied	93.8%	87.5%	100.0%	100.0%	75.0%	100.0%	100.0%	
%Family response	40%	30%	26%	18%	40%	60%	33%	34%

Family Satisfaction Survey - 2008 - 2009			
Do you feel that the person receiving service from KDSCL:	No	Yes	N/A*
Makes his/her own choices at KDSCL?	0	37	4
Receives prompt, responsive service?	1	31	9
Chooses hours of service?	3	27	11
Advance to the level of independence they are seeking?	3	26	12
Achieves their individual goals?	2	30	9
Establishes relationships?	2	35	4
Do our services offer:			
Respect and dignity?	1	38	2
Steady hours of service?	1	38	2
A secure, safe environment?	1	38	2
Positive experiences?	0	36	5
Competent, knowledgeable staff?	2	36	3
Flexibility?	1	34	6
Meaning and productivity?	0	36	5
Are you:			
Happy with the quality of services provided?	2	37	2
Being kept informed of options and services?	6	31	4
Receiving regular communications from KDSCL?	4	34	3
Able to understand the agency purpose?	0	39	1
Satisfied with the individual's accomplishments?	1	38	1
*N/A = No Answer Given			

Satisfaction Survey 2008 - 2009								
Other Stakeholders: Caregivers, funders, customers								
Surveys were sent to caregivers, funders and customers in each of KDSCL's areas of service for a total of 123 surveys. The following is a breakdown by area of Service recipients who responded to the survey and indicates satisfaction levels. Some surveys contained more than one answer to a question, some questions were not answered.								
	Day							
	Service	ICO	Evening	Larry's	KDI	Richter	I.F.	Agency
Sent	45	25	16	11	21	1	3	
Received	15	8	4	6	4		2	1*
% Satisfied	100.0%	89.0%	100.0%	90.0%	75.0%	100.0%		100.0%
%Stakeholder response	33	32	25	55	19	0	67	
* This survey was received from CLBC and didn't specify area surveyed.								

Outcomes Measurements

Outcomes are the impact the services we provide have on the individuals we serve and their support networks. Outcome measurements are used to measure that impact. At KDSCL we prepare outcome measurements and gather data on outcome goals from July through to June. This year our Outcome Measures were amended in December due to CARF recommendations. Measurements regarding zero incident reports being filed, and meeting balanced budgets were eliminated. CARF surveyors suggested that these were goals all organization have, and more specific goals needed to be implemented. The following shows the results of the amended outcomes measurements.

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

OUTCOMES MEASUREMENTS: July 1, 2008 to June 30, 2009

1. RICHTER RESIDENCE AND HOME SHARING							
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	Development Supervisor	100%	83%. Goal not met. 5 out of 6 ISPs completed. The ISP that was not completed did happen in July 2009 (one month after it was due).
Individuals experience citizenship through inclusion in their communities.	<i>Effectiveness</i> Number of different community activities the residents participate in of their choosing.	Residents-1976 Richter	Annually	1. GPIT's 2. Post Activity Calendars 3. Richter Activity Tracker	Development Supervisor	All residents experience 10 different activities.	The 5 people who live at Richter experienced at average of 19 activities of their own choosing. Goal met and surpassed
Maximize the opportunities individuals have to develop friendships/relationships with non-paid persons.	<i>Effectiveness</i> Number of times that each resident participates socially with person's they do not live with.	Residents-1976 Richter	Annually	1. Post Activity Calendars	Development Supervisor	Staff facilitate 6 opportunities for all 5 individuals.	Staff facilitated an average of 8 opportunities for all 5 individuals. Goal met and surpassed.

RICHTER RESIDENCE AND HOME SHARING - Continued							
Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize the efficiency of the Richter data collection system.	<i>Efficiency</i> Number of working days after month end that post activity calendar is sent to AQAM.	Richter Staff	Monthly	1. Email.	AQAM	3 working days.	Average 7.5 days. Goal not met. This measure began in February. Still implementing steps to increase efficiency.
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%	100% Goal exceeded.
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%	100% Goal exceeded.
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%	100% Goal exceeded.

2. 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.	Day Service Recipients	Annually	1. ISP's 2. ISP Semi Annual Reviews	Activity Supervisor	100%	92% of individuals had an ISP or ISP review completed (80 out of 87). Goal not met. Two of the missed ISPs were postponed by family, and the other 5 ISPs were late due to delays in meeting planning.	
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 activities that are facilitated but not staffed that individuals participate in.	Evening/ Weekend Service Recipients	Annually	1. Social Recreation Leisure database	Activity Supervisor	12	4 activities were facilitated but not staffed. Goal not met. Work towards this measure began in November. The lateness of the start, and experimentation regarding which activities are best suited could account for not meeting this goal.	

ACTIVITY SERVICE - Continued							
Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize opportunities for persons to participate in community volunteerism.	<i>Efficiency</i> Percentage of CPD workload devoted to volunteer placement development.	CPD	Monthly, November - June	Sharevision list, CPD Development Duties tracker	Activity Supervisor	40% of CPD work duties are devoted to new volunteer placement development.	15.82% of work duties are devoted to new volunteer placement development. Four weeks of time was tracked. Goal not met.
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 activities that are offered at KDSCCL facilities that relocate to community.	Day Service Recipients	Annually	1. Activity Schedule	Activity Supervisor	5	5 activities moved (yoga, exercise, computer classes, educational games, art) Goal Met.
Individuals are safe and secure.	<i>Effectiveness</i> Number of incidents involving falls.	All Service Recipients	Monthly	Incident reports.	Activity Supervisor	16% decrease from previous year.	Goal not met. In Activity Services: 2007/08 there were 24 incidents involving falls. In 2008/09 there were 28 incidents involving falls.
Maximize satisfaction of all persons served.	<i>Service Satisfaction</i> Percent of individuals who express satisfaction with services.	All Service Recipients	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	97% of Service Recipients expressed satisfaction with services. Goal exceeded.

ACTIVITY SERVICE - Continued							
Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
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%	96.9% of Family responding to surveys expressed satisfaction with services. Goal exceeded.
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%	100% of paid caregivers and funders responding to surveys expressed satisfaction with services. Goal exceeded.

3. INDIVIDUALIZED FUNDING								
Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results	
Maximize satisfaction of all persons served.	<i>Service</i> Satisfaction Percent of individuals who express satisfaction with services.	IF Service Recipients	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	100 % satisfaction. Goal met.	
Maximize satisfaction of person's served families.	<i>Family</i> Satisfaction Percent of individuals who express satisfaction with services.	Families	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	100% satisfaction. Goal met.	

4. BUSINESS 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	Development Supervisor	100%	33 out of 39 ISPs completed. 85% completed. Goal not met. One ISP was postponed by family, the other 5 ISPs were late due to delayed planning.
Maximize number of persons in training to move on to supported community employment.	<i>Effectiveness</i> Percentage of people who request employment and are referred to ICO for employment support.	Service Recipients	Annually	1. GPITs 2. Referrals	Development Supervisor	100%	100%. Goal Met. 5 individuals who participate in the Business Services requested employment, and were referred to ICO.
Maximize the number of opportunities related to the function of the business.	<i>Effectiveness</i> Number of persons who participate in business function tasks that foster skill development.	Service Recipients	Annually	1. Task Tracker	Development Supervisor	15 people/ 5 different functions	28 individuals participated in 5 different functions. Goal Met.
Maximize opportunities for persons to participate in social recreation and leisure activities through inclusion in their communities.	<i>Effectiveness</i> Number of social recreation and leisure activities provided in the year.	Service Recipients	Annually	1. Task Tracker 2. Post Activity Calendars	Development Supervisor	Individuals participate in 10 different activities.	33 activities were offered that individuals participated in. Goal met.

BUSINESS SERVICE - Continued							
Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Maximize satisfaction of all persons served.	<i>Service</i> Satisfaction Percent of individuals who express satisfaction with services.	Service Recipients	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	88%. (Combined responses from satisfaction surveys, and exit interviews. 7 out of eight people giving input were satisfied with services). Goal not met.
Maximize satisfaction of the person's served families.	<i>Family</i> Satisfaction Percent of individuals who express satisfaction with services.	Families	Annually	1. Satisfaction surveys 2. Exit Interviews 3. Complaints forms	AQAM	90%	100%. Goal met and exceeded.
Maximize satisfaction of all stakeholders (Funders, customers paid caregivers).	<i>Stakeholder</i> Satisfaction Percent of individuals who express satisfaction with services.	Stakeholders and External Influences	Annually	1. Satisfaction surveys 2. Complaints forms	AQAM	90%	82% Goal not met. 9 out of 11 stakeholders responding to surveys were satisfied with services.

5. INTEGRATED CAREER OPPORTUNITIES								
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	Development Supervisor	100%	93%. Goal not met. 62/72 of individuals have had ISPs. 5 people are on ICO follow-up so should not be included in the 72. Two ISP's were postponed by family, 2 were late due to delays in planning. One person exited service prior to their ISP happening.	
Minimize the number of people who are permanently employed in a KDSCl 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. People Seeking Employment Tracker (ShareVision)	Development Supervisor	5	2 individuals involved in KDSCl work groups were employed by another employer. Goal not met. Four other people who are involved in KDSCl work groups also had goals for employment outside of KDSCl. As of June 30 they were involved with the Discovery and Job Search processes.	
Maximize opportunities for persons to be employed by community employers	<i>Efficiency</i> Percentage of CPD workload devoted to job placement development.	CPD	Monthly, November - June	Sharevision List CPD Development Duties Tracker	Development Supervisor	40% of CPD work duties are devoted to new community job placement development (excluding development of KDSCl work group opportunities)	11.62% of work duties are devoted to new employment placement development. Four weeks of time was tracked. Goal not met.	

INTEGRATED CAREER OPPORTUNITIES - Continued							
Outcomes Objectives	Measures	Applied to	Time of measure	Data source	Obtained by	Goal	Results
Baseline employment satisfaction.	<i>Effectiveness</i> The number of individuals who remain employed with the same employer for over a 6 month period.	Service Recipients Employed	Annually	1. Survey	Development Supervisor	Identify at least 10 factors that promote long term employment.	Goal met. 10 factors identified. See below**
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%	100%. Goal met.
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%	87.5%. Goal not met. 7 of 8 families responding to satisfaction surveys were satisfied with services.
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%	89%. Goal not met. 8 of 9 stakeholders responding to satisfaction surveys were satisfied with services.

6. 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> The number of days people wait to access or increase service.	Service Recipients	Annually	Waitlist/referral form ShareVision	Activity and Development Supervisor	35 working days	Average wait was 9 working days. Goal Met.		
Maximize satisfaction KDSCL staff have regarding communication between service areas.	<i>Business Function</i> <i>Percentage of individuals who express satisfactory communications between service areas.</i>	Staff	Annually	Staff Satisfaction Surveys	AQAM	85%	66.7% of staff satisfied with the communications between service areas. Goal not met. Input gathered at staff meetings and in-services and implemented.		
Maximize the effectiveness of the KDSCL data collection system.	<i>Business Function</i> Percentage of Sharevision serve recipient websites in use.	Service Recipients	Annually	Sharevision Websites	AQAM	A Sharevision website for each service recipient.	Goal not met. Still in the process of transferring paper processes to Sharevision.		

****Identify at least 10 factors that promote long term employment**

12 people were interviewed who have been in the same job for over 6 months.

Identified factors:

1. Nice co-workers/people/boss/people interactions
2. Feeling comfortable asking for help
3. Feeling welcome
4. Working is interesting and important to them
5. Work is appreciated
6. Extra benefits
7. Enjoy specific tasks
8. Money is adequate
9. Getting to work is easy
10. Keeping busy/like working

*****ISP's or Reviews**

12 individuals did not have an ISP or another type of review. Four of these reviews were postponed by family, and eight were late due to planning delays. Five people did not have ISPs because they were in ICO Follow-up. Of the twelve individuals who did not have ISPs, six were involved in multiple services, which lead to the count of 24 ISPs not being completed across services.

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

1953 - 2008

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. 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. 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.

2008: KDSCL celebrated 55 years of service to the community. Unfortunately this proved to be a difficult year with the unexpected death of Leagh Edwards, a 25 year employee, on April 18. He made many contributions to the society including coordinating KDSCL's first successful 3 year accreditation designation. He was a very kind man and his death affected many.

The ICO bottle sorting group moved from sorting bottles at KDSCL locations to Columbia Bottle. The contract expanded to include KDSCL collecting donated recyclables at the locations with the proceeds going directly to the society. ICO continued to develop the discovery process focusing on individual specific employment.

The Activity Service continued to expand. Individuals participated in various activities including scrap booking, bird watching, CURVES and volunteerism. Some activities that were held at 555 Fuller Avenue began relocating to community venues. Many additional opportunities were offered through the evening and weekend service. KDSCL set up their first successful home share living arrangement for one individual. Larry's Cycle and Sport sales were similar to previous years while the wood shop's decreased slightly due to the decline in building. KDSCL staff hosted a second very successful Craft and Bake Sale fundraiser. The building project remained live and active. All city requirements were satisfied and the board and executive director worked actively to find a fund raising chair. Eight self advocates attended the BCACL AGM and Conference in Surrey. In November KDSCL had their second accreditation survey and in January of 2009 we received confirmation that we again received a three year designation.

KDSCL Travel Club Trips 1991 - 2008

1991: The newly formed Travel Club made its first trip to Hawaii!

1992: Cruise down the Mexican Coast

1993: Mexico

1994: Disneyland

1995: Mexico and Mara Lake Camping

1996: Alaskan Cruise and Mara Lake Camping

1997: Mexico, Hawaii and Osoyoos Camping

1998: Mexico, Disneyland and Osoyoos Camping

1999: Mexico and Camp Owaissi

2000: Mexico and Camp Owaissi

2001: Disneyland and a Cruise back to Vancouver and Camp Owaissi

***2002:** Mexico and Camp Owaissi

***2003:** Mexico, Disneyland, and Camp Owaissi

***2004:** Mexico and Camp Owaissi

***2005:** Disneyland, Victoria, Camp Owaissi and the Kootney's

***2006:** The residents at Richter Street vacationed in Mexico while the interior of the house was being painted. 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.

2007: The officially resurrected Travel Club went to Disneyland, Niagara Falls and hosted a September one week camp at Camp Owaissi.

2008: The travel club went to Tofino, Disney World and on a Caribbean cruise. KDSCL also coordinated another fun filled week at Camp Owaiss where a 55th celebratory barbeque was held. A group also went to the Christmas Light up in Leavenworth.

***:** Travel Club trips not coordinated by KDSCL.

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