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## MISSION

Committed to assisting people with developmental needs to live, work and participate fully in the community as valued partners.

## VISION

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## CORE VALUES

Community Living Owen Sound and District will be a positive influence in shaping a community where all people have the opportunity to live out their hopes and dreams, regardless of differences in intellectual or other abilities.

- Dignity and Worth of Every Person
- Mutual Respect and Healthy Relationships
- Family and Friends
- Privacy and Confidentiality
- Informed Choice
- Risk, Opportunity and Lifelong Learning
- Community Inclusion

# MESSAGE FROM OUR LEADERS

Ros Brooks - Board President



Michele Bell - CEO



We certainly could not have anticipated this time last year that we would have to endure another whole year of the pandemic. Unfortunately, 2022/23 began similarly to the beginning of the previous year, with Covid-19 running rampant through our communities. This continued on and off throughout most of the year as we continued to experience outbreaks in our homes. Our staff still had to conduct Rapid Antigen Tests weekly, and our ability to gather, whether in a residential home or in Community Participation, was hampered by ongoing restrictions placed on our sector and so much of our time was spent managing the pandemic and its impact on supports and services.

Developmental services have had to endure one of the longest impacts to operations as a result of the pandemic and it has only been in the last few months of the fiscal year that we began to see the changing tide with the pandemic's hold over us diminishing. It finally feel like we are all now collectively looking through the rear-view mirror and planning for life post pandemic.

Despite the challenges presented by the third year of the pandemic and the restrictive measures in place throughout the year, we still have so much to be proud of here at Community Living Owen Sound and District.

There was a focus in 2022/23 on evaluating and then enhancing the level of supports to people in our residential homes. We introduced new master schedules in our residential supports and increased full time positions to forty hours per week from thirty-two hours. These two measures reduced the overall number of staffing required and helped with our vacancy rate in a very tight labour market.

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We implemented a centralized recruitment process in our partnership with Tri-Alliance and in doing so, we experienced a significant improvement in overall staff vacancies in the last quarter of the fiscal year. This continues to be an immense help in our recruitment efforts.

# MESSAGE FROM OUR LEADERS

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There has also been work completed on the reorganization of our Community Supports Department. In preparation for further individualized funding and the need to separate Community Participation funded supports and passport purchased services, we began the long and complicated work of restructuring of the department. Much of this year was spent in the planning stages and this coming year will be spent implementing the changes to prepare for an enhanced customer experience, in both passport and community participation.

We embarked on the development of a Strategic Plan process that was new for CLOSD. Through our partnership with Tri-Alliance and People Minded Business, (PMB) we began the process of looking towards the future. Through meetings, surveys, and conversations with people supported, their families and the staff teams, the consultants with People Minded Business gathered a good picture of where we are at and where we need to be going. The final stages of the Strategic Planning process is still under construction, but very soon we will have the final draft of the plan with a roadmap for the next three years. Thanks to all who participated in the process. Stay tuned for the final draft that will be published soon.

Throughout the strategic planning process, we heard a lot about the transformational plans the Ministry of Children Community and Social Services (MCCSS) is planning through Journey to Belonging. Journey to Belonging: Choice and Inclusion lays out the ministry's long-term vision for developmental services in Ontario, where people with developmental disabilities are supported to fully participate in their communities and live fulfilling lives. This transformation will categorically change the way services are provided in our sector and we are making plans to ensure that we are ready and prepared for the changes. Journey to Belong, was certainly a major factor considered while going through our strategic planning process.

To Find out more about Journey to Belonging, please check out the link below:  
<https://www.ontario.ca/page/journey-belonging-choice-and-inclusion#section-1>

We have also been working cooperatively with our other partners in the Tri-Alliance Shared Services, Community Living Walkerton and District and BPACL. Jan 1 2022 Tri-Alliance Shared Services began as the centralized management and back office that is supporting the three agencies in the alliance. This past year saw many changes at the management level as anticipated retirements in all three agencies occurred. Through the tri-alliance we are preparing for the future transformation of the sector by aligning all our administrative tasks to create efficiencies resulting in better outcomes to people supported and their families. A centralized back office and management permits each agency in the alliance to access highly qualified professional in the areas of Human Resources, including recruitment and retention initiatives, Quality Assurance, Policy Development, Finance and Payroll, and a focused approach at the front line management. The very important work we are doing with Tri-Alliance is laying the ground work for us to be successful through the transformation of the sector through Journey to Belonging.

Despite the fact that we worked through a third year of the pandemic, we have accomplished great things and we could not have achieved all this without the amazing work of our staff and support from our family and friends, and most importantly, the incredible resiliency of the people we support. Together we have demonstrated that great things can happen even in challenging times. Thanks to all who have worked so hard to improve the lives of the people supported at CLOSD. We look forward to continuing to support the people in our community to live their best lives

# BOARD OF DIRECTORS

Ros Brooks, President

Michael Forcier, Vice President

John Cherrie, Treasurer

Jamie Nicol, Board Member

Paul Middlebrook, Board Member

Ron Fenwick, Board Member

Dave Wenn, Board Member

Al Smethurst, Board Member

Judy Porteous, Board Member

Bob Nicol, Board Member

## COMMITTEES

### Executive Committee:

- Ros Brooks, President
- Michael Forcier, Vice President
- John Cherrie, Treasurer

### Resource Property Committee:

- Dave Wenn, Chair
- Ros Brooks
- Michael Forcier

### Nominating Committee:

- Ros Brooks, Chair
- Al Smethurst

## MANAGEMENT & ADMINISTRATIVE TEAM

**Michele Bell**  
Chief Executive Officer

**Diccon Garrett**  
Director of Operations

**Adriana Londono**  
Director of Finance

**Mary Fee**  
Manager of Adult Services

**Stephanie Alberts**  
Manager of Human Resources & Administration

**Deb Smith**  
Manager of Quality Assurance & Policy Development

**Sue Skinner**  
Manager of Quality Assurance & Resource Development

**Fiona Smith**  
Manager of Alternative Housing & Community Links

**Tammy Robertson**  
Manager of Community Supports

**Craig Rourke**  
Manager of Accommodation Supports

**Jeanie Chavarie**  
Manager of Support Services

**Leanne Hopkins**  
Manager of Child & Family Services

**Sheryl Marshall**  
Manager of Child & Family Services

**Chloë Deschênes**  
Manager of Communications & Philanthropy

**Jackie McCartney**  
Manager of Passport, Employment & Individualized Funding

**Melissa Robbins**  
Senior Executive Administrator

**Laura VanderHulst**  
Administrative Assistant

**Kim Jex**  
Sr. Payroll Administrator

**Chris Koch**  
Payroll & Finance Administrator

**Mary Lou Whitcroft**  
Payroll & Finance Administrator

**Carol McCauley**  
Payroll Administrator

**Rachel Edgar**  
Recruitment & Retention Coordinator

**Rachael Fritsch**  
Administrative Assistant

## SUPERVISORY TEAM

**Gareth Lloyd**  
Team Lead

**Melissa Mertineit**  
Team Lead

**Michelle Rutt-Carlson**  
Team Lead

**Suzanne Smith**  
Team Lead

**Jodi Klerks**  
Team Lead

# EMPLOYEE MILESTONES

A special thank you to those celebrating a milestone anniversary this year for your hard work and commitment to the people and families that we support.


5	Carrie Reich Victoria Reevey	Melissa Mertineit Miranda Chalifoux-White	25	Michelle Proud Catherine McLaughlin
10	Alexis Kahgee Patty Middleton	Deanna Hellyer Jodi Klerks	30	Maureen Crawford
15	Jennifer Morrow		35	Donna Brull Leanne Hopkins
20	Lori Moore Catherine Foster Craig Rourke	Susan Ward Fiona Smith		

# COMPLIANCE REVIEW

**Compliance Inspection Dates:  
June 14-17, 2022**

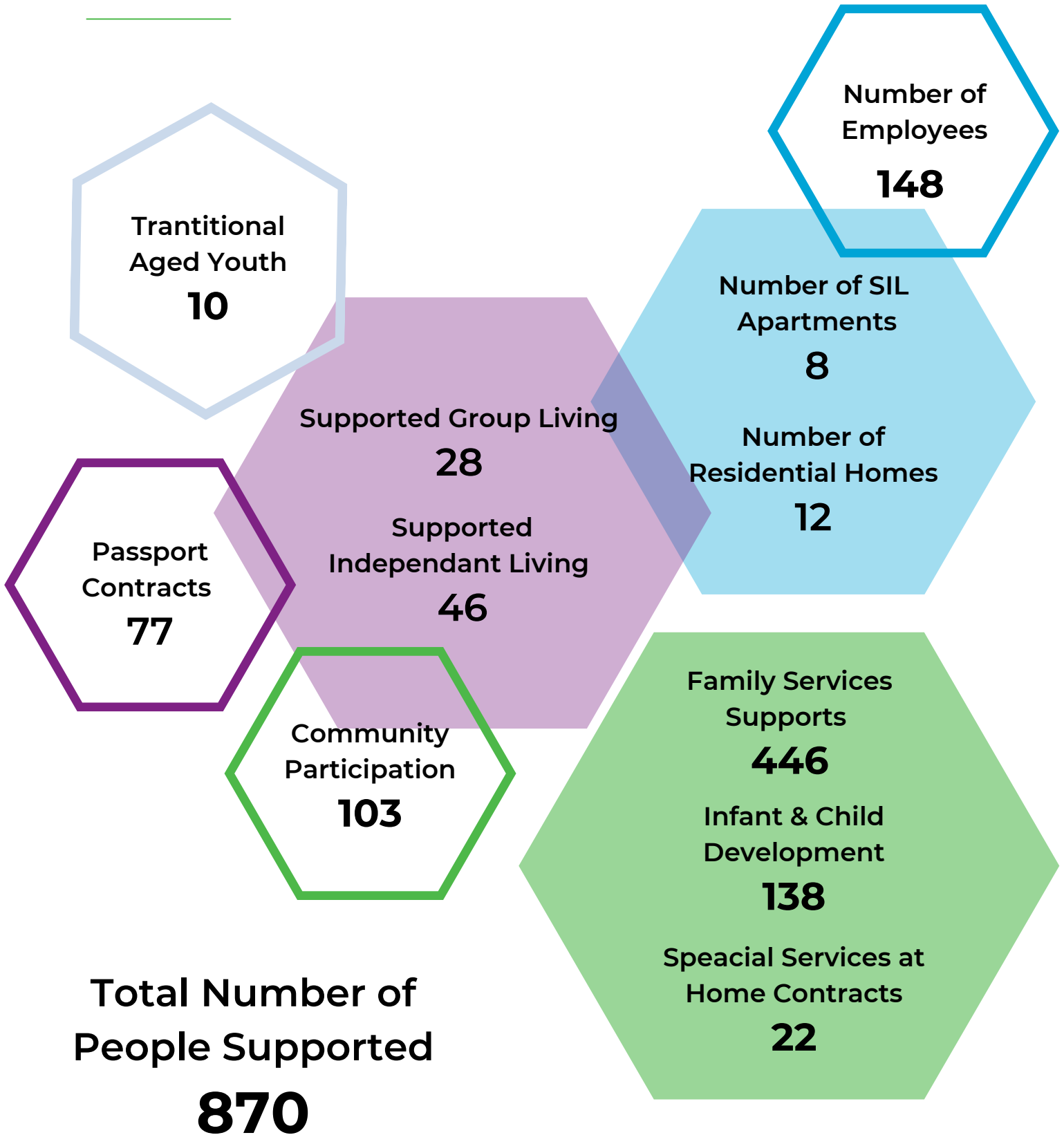
Reviewed

4 Supported Group Homes	8 Staff Files
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 Inspection based on **279** indicators

**100% Compliance**

# SERVICES AT A GLANCE





# CELEBRATING OUR DIFFERENCES AT LOCAL SCHOOLS!

The Communications Strategy Committee is made up of people who receive supports and people who offer supports. This committee is responsible for engaging with and educating people in our communities who are not connected to Community Living Owen Sound and District. As a committee we have been very excited to have the chance to return into local schools the second half of 2022 to continue programming on the topic of diversity and inclusion with local youth.

Spinclusion is a game which promotes inclusion and celebrating strengths and diversity. It not only focusses on the benefits of including people of all abilities but also including people of all genders, cultures and sexual orientations. The game consists of breaking the class into small groups which take turns answering questions that promote thinking and discussing ways to include everyone and to consider people's feelings. One student new to Canada spoke English for the very first time in front of her classmates while we played Spinclusion. It was an extremely powerful moment for everyone.

These past few months our team has read to students throughout Grey and Bruce Counties. We have a variety of books about inclusion and the importance of being a good friend and being kind to one another. Reading these books led to many great discussions not only about our physical differences but also about the daily challenges we all face. We also discussed all of the many things we have in common with each other. Throughout our discussions we identified how boring it would be if we were all the same! The students openly discussed the impact that COVID has had on their mental health.

During COVID our team read virtually to classes. This was often a challenging experience for everyone. Some students kept their screen off and many were distracted and not engaged. Yet in some cases siblings joined the student and were very happy to hear the stories.







# CELEBRATING OUR DIFFERENCES AT LOCAL SCHOOLS!

A BIG thank you to the following schools for welcoming us and participating in these initiatives:

- Alexandra Community School
- Bruce Peninsula District School
- Chesley District Community School
- Hillcrest Elementary School
- Keppel- Sarawak Elementary School
- Paisley Central School
- St. Basil's Catholic Elementary School

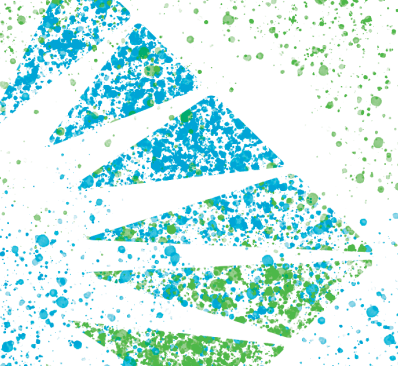
## Fun Facts:

- 7 Schools participated
- 8 Classes played Spinclusion
- 46 Classes listened to stories
- 54 Classes were visited in schools
- 192 Students played Spinclusion
- 964 Students listened to stories
- 1156 Total number of students who learned about inclusion and diversity



It was fabulous to finally get back into the schools to read, play Spinclusion and interact with staff and students. We had many meaningful conversations about inclusion and diversity. Our team is always astounded by the profound contributions of the students while participating in these activities.

Submitted by:  
Marsha Alexander, Community Support Worker  
Kim McCorkindale, Employment Specialist



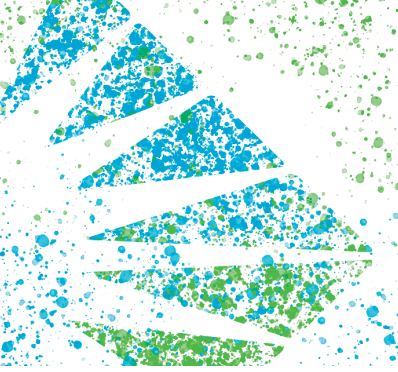
# ACCOMMODATION SUPPORT

Change is inevitable and this past year was no exception. A number of changes took place with how people went about their day-to-day routines. People choosing to receive support, their families, and people offering supports were able to see an end to lockdowns and a lifting of restrictions on their ability to come and go from their homes. Staff continued to adapt to COVID-19 rules and prevention measures and the demands of the job. People choosing to receive supports in their home proved time and time again that they were able to respond to changes and follow measures put in place to prevent the spread of illness. This sometimes meant that people had to self-isolate in their bedrooms within their home for a number of days. What was challenging for people and their families was at times having to watch restrictions and rules be lifted for some people in our community while people choosing to receive accommodation supports still had to follow more stringent rules and restrictions.

We appreciate the resiliency of people who chose to receive support and the patience and understanding they and their families demonstrated as we navigated the changes.

Another significant change that took place within the Accommodation Supports program over the past year was an overhaul to the master line schedules and hours of the majority of the Accommodation Supports Team. Towards the end of 2022 we shared our intentions to increase the amount of support hours available to people in their homes. This change provided for more times that people had access to 1-1 supports to work on their personal goals and participate in things that are important to them; it also enhanced health and safety measures to ensure that people were supported well in their home.

As we entered 2023, people had more opportunities to participate fully in community. People returned to volunteering, to social and recreational interests outside of their homes. Sometimes, this was challenging after having spent a good portion of the pandemic away from going to plays, movies, concerts, sporting events, etc. We value all of the efforts everyone is putting in and we are grateful to be able to be with people as they return to being able to access some of the good things in life.

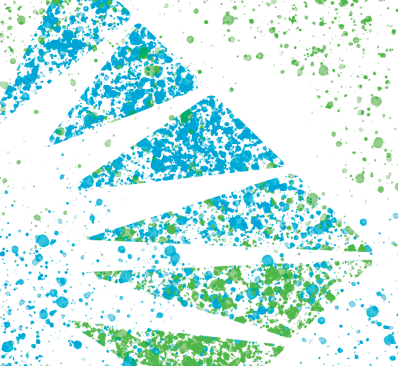


# ACCOMMODATION SUPPORT

Reflecting back over the past year, it is impressive to recount how many new skills people developed in a number of areas such as using technology, cooking, learning new home-based hobbies such as scrapbooking and rug hooking. People showed pride of ownership of their homes by contributing to the daily upkeep of their homes, meal planning, cooking and starting indoor seed planting for spring summer gardening. People participated in more dynamic and diverse planning conversations to set goals for the things they want to do and the routines and rituals that they value now that COVID-related restrictions are less isolating. People are excited to use their Passport funding to participate in fun and meaningful opportunities. As people returned to places in their communities where they were absent from during lockdowns it was awesome to see that they were missed and that people welcomed them back as familiar friends and acquaintances as they went back to life as usual. In our small community it is nice that people often have the opportunity to see the same people at their preferred vendors and are valued customers.

We are aware that we still have some work to do to all get re-energized and reinvigorated to ensure that people have all of the opportunities they deserve to have meaningful days and to live their best lives. We are fortunate that people who choose to receive supports are so adept at helping people who offer supports to learn to understand their unique goals, desires and dreams. We look forward to the year ahead and a return to why we all chose to become engaged with Community Living and that is to ensure that everyone has the opportunities to live, work and participate as valued partners.

Submitted by -  
Craig Rourke  
Manager of Accommodation Supports



# CHILD & FAMILY SERVICES

Submitted by: Leanne Hopkins, Manager of Child & Family Services

## Children's Services

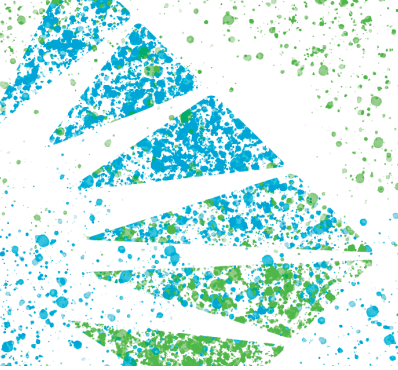
Children's Services is comprised of Infant and Child Development and Special Needs Resource Consulting programs. These programs are often referred to as the "gateway" to accessing supports for children at risk for delays in development or children presenting with developmental delay. Team members working in these programs focus on providing evidence-informed, early intervention strategies tailored to each child's unique presentation of developmental strengths and support needs. Using plans detailing objectively driven early intervention strategies, parents and caregivers are coached and mentored to master the strategies and carry them out through daily care routines and play-based activities with their children to optimize each child's developmental potential.

### Carrie, Infant and Child Development Services -

"I received a referral for baby A back in October 2022. Born at just 22 weeks gestation weighing 450 grams, (approximately the size of a papaya), Baby A was a micro-preemie with an unpredictable journey in the Neonatal Intensive Care Unit ahead for her and family. I have been truly inspired by her family and her determination to learn new skills and defy all odds that were against her from birth. A has now mastered crawling and has a real determination to walk independently. It's amazing to work with this little one and her family. We started our work together virtually and now visiting in person is an option and so rewarding. A does not let anything stand in the way of achieving the next goal.



Way to go baby A!"



# CHILD & FAMILY SERVICES

Year over year, 25% of all children referred to Infant and Child Development Services is because of a premature birth or complications of prematurity. Each year, on average, 80 new families are welcomed to Infant and Child Development Services at Community Living Owen Sound and District. Children are eligible for services until school entry, typically exiting our program after beginning Junior Kindergarten. One in four children will meet the eligibility criteria for and transfer to Family Support services and continue their involvement with the agency.

## Sandra, Special Needs Resource Consultant -

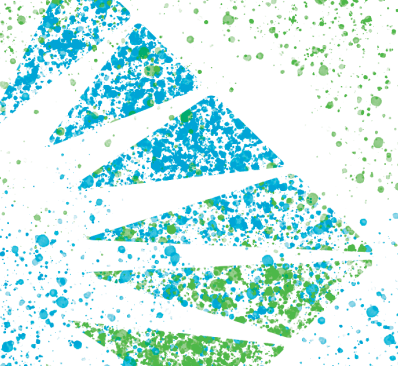
"I have been visiting J at the daycare over the last few years assisting the Early Childhood Educators and J's family through the ups and downs of participating in a child care program during a pandemic. It has been my pleasure to be part of this little man's journey. One of my greatest joys, is watching and encouraging children to reach their developmental goals. One step at a time.

J. has worked very hard at independent walking. Here he is walking just holding my finger for that little added support. Next step: walking on his own!"



## Family Support

The Family Support program provides individualized assistance, access to sector-specific and cross-sectoral information and resources, identification of and planning for the coordination of supports and services throughout the lifespan, networking and advocacy. Support is for the parents /family members of the person diagnosed with a developmental disability that resides in the family home. Supported by team members, parents are empowered to become confident and effective advocates for their children in all aspects of their lives and through the lifespan. Team members assist families with individuals as young as 4 years of age and as old as 65 + years of age.

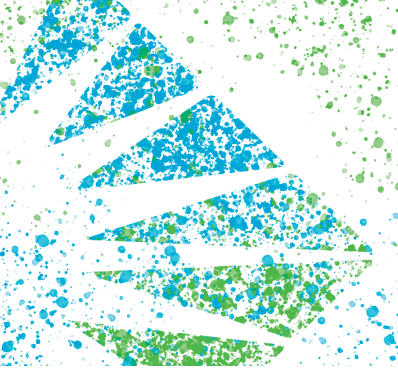


# THE LINK

Submitted by: Marsha Alexander, Community Support Worker

The Link is always a centre filled with friends and fun! Recently, we celebrated our love of music with some good ol' karaoke, hosted by our friend Jackie Ralph! We have been out and about in the community Geocaching and taking parts in Community events as much as possible! We visited the CMHA coffee house, and ventured to the One World Festival. We are lucky to have local talent Glen Eden perform for us on many occasions. Our new session of activities begins July 1-Sept 30 with a variety of summer fun in the plans. We will be visiting waterfalls, birdwatching, attending music at the market, learning to crochet, hiking, hitting the beach, and many more summer adventures!





# COMMUNITY SUPPORTS

Versatility, putting our flexibility to the test!

This past year Community Supports (support pool) has continued to flex and help as much as we can to those in need. This year was about helping within, more than ever before.

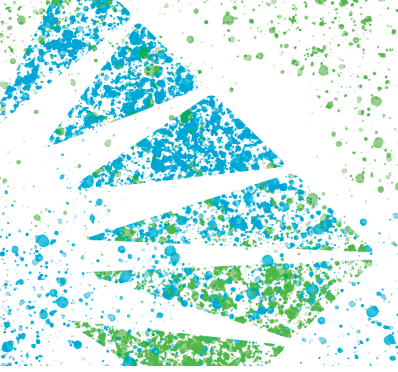
Each department has faced critical staffing issues and the Support Pool is no different, we went from 34 staff last year to 24 in the spring of 2023. Some staff left to pursue other dreams and passions, others are off enjoying motherhood all the while it became more and more difficult to back fill or hire replacement staff.

We continued to support the 190 individuals within Supported Independent Living, Community Participation and Passport collectively, however support needed to be blended or shortened due to time constraints and less staff offering support. Not only did the Support Pool support more individuals in the community we also began offering support to the Accommodations program. The support Pool staff worked over and above their 40 hours to provide crisis support to all the Accommodation homes within our service and many staff working in both programs in a day.

This response to the staffing crisis allowed us to have a greater appreciation of the work provided in the supported homes and created stronger working relationships between the two programs.

With recruitment and retention having a focus on filling vacancies within the supported homes the need for redeployment has lessened for support pool staff with each new hire. We are stiving to make changes in the upcoming year to be able to offer more Community Supports to more people in a consistent and stable structure. During the past year Support Pool staff continued to support so many great things within Community Supports as the opportunities within our communities continue to be revitalized and renewed. We are looking forward to offering these opportunities within our SIL, CP and Passport Programs as well in the upcoming year.

Submitted by -  
Tammy Robertson  
Manager of Community Supports

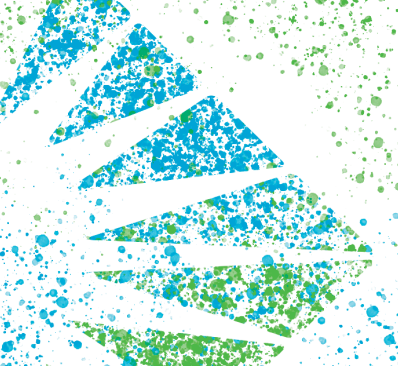


## SUCCESS STORY - ERICA B

Erica and her 2-year-old daughter, Olivia, have recently moved into their own apartment where they are closer to family and support networks. Erica has been supported daily in her new home to assist with all aspects of daily living such as cooking, budgeting, medical appointments and support to access parenting resources. Erica's support team in Port Elgin say that she is on a great path to success and they will continue to offer supports as Erica grows in her independence and as the milestones within motherhood unfold.







# TRANSITIONAL AGED YOUTH

For many this is very tough season in life - young people moving from the world of youth and children's services to the world of adult services, for a host of different reasons. So many mixed emotions and hurdles to overcome. Many with a background of trauma. It takes a very dedicated group of people to understand and work with all that this entails. Transition is hard ! Our goal is to support these transitions in the most positive way possible.

This year has been a challenge, mostly due to finding affordable housing solutions, and staffing those solutions, BUT through it all we have been champions. The staff that showed up to work every day with positivity and a smile, to support young people in reaching for the stars.

A young man moved into our River house location in November 2022. He came from living in a tent in a yard, being in trouble with the police, and a background of property damage, to having a warm place to rest his head, food to eat, and staff to help him navigate his thoughts, feelings and emotions. Basic things for most of us.

Very quickly the staff learned of R's many strengths and of his hopes and dreams. He was encouraged to join and attend the Employment workshops that were being held at CLOSD Admin building. R was able to attend all sessions without staff support and earned his certificate of completion. Next steps he wants a paid job! Congratulations R.



Makaylah transitioned into her own apartment in our Supported Independent Apartments. This has enabled Makaylah to blossom, and be more independent She loves making her own food and invited her neighbour for supper.

Submitted by -  
Fiona Smith

Manager of Alternative Housing & Community Links

### **What is Tri-Alliance Shared Services?**

Tri-Alliance Shared Services is a not for profit agency providing management and administrative services to the communities of Community Living Owen Sound and District (CLOSD), Community Living Walkerton and District (CLWD), and Bruce Peninsula Association for Community Living (BPACL). On Jan 1 2022, 27 employees – comprised of the management and administrative teams of the three community living agencies began their new employment with Tri-Alliance Shared Services.

### **Why Was Tri-Alliance Shared Services Formed?**

Working collaboratively the three boards took the decision to create Tri-Alliance to improve the efficiency and effectiveness of our management and administrative functions by bringing them together into one agency with the goal of creating better outcomes for people supported. The integration of the back office and management services will better prepare all three agencies for the changes to our sector through MCCSS's transformation of the developmental services sector through Journey to Belonging – Choice and Inclusion.

### **How Does Tri-Alliance Shared Services Function?**

Each of the agencies continues to be a separate legal entity that now contracts the management and administrative services from the Tri-Alliance Shared Services. TASSO is a not-for-profit agency, supported by a Board of Directors comprised of two Board members from each of the three founding members.

### **What Has Tri-Alliance Shared Services Accomplished Thus Far?**

Much of the 2022/23 year has been spent aligning systems and our work to create greater efficiencies on the back end with the intention of strengthening the support provided to the people supported in our community.

- An HR Department with centralized recruitment to help with recruitment initiatives.
- A Manager of Communications working on all our websites, social media, and this very report. Supporting internal and external communication in all three communities
- Alignment of our management team by functional area rather than location.
- Introduced new software to create efficiencies – in finance, Passport, case management software.
- The creation of a new department, Passport, Employment and Individualized funding. This department will focus on preparing for the future plans of the Ministry to further expand individualized funding model through Journey to Belonging.

Michele Bell  
CEO

March 31, 2023

Year End Report for  
Community Living  
Owen Sound and District

Prepared by:  
FINANCE DEPARTMENT





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## Financial Report 2023

What we have today	.....
How did we do this year	.....
Operations revenue	.....
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## WHAT WE HAVE TODAY

### Community Living Owen Sound and District March 31, 2023

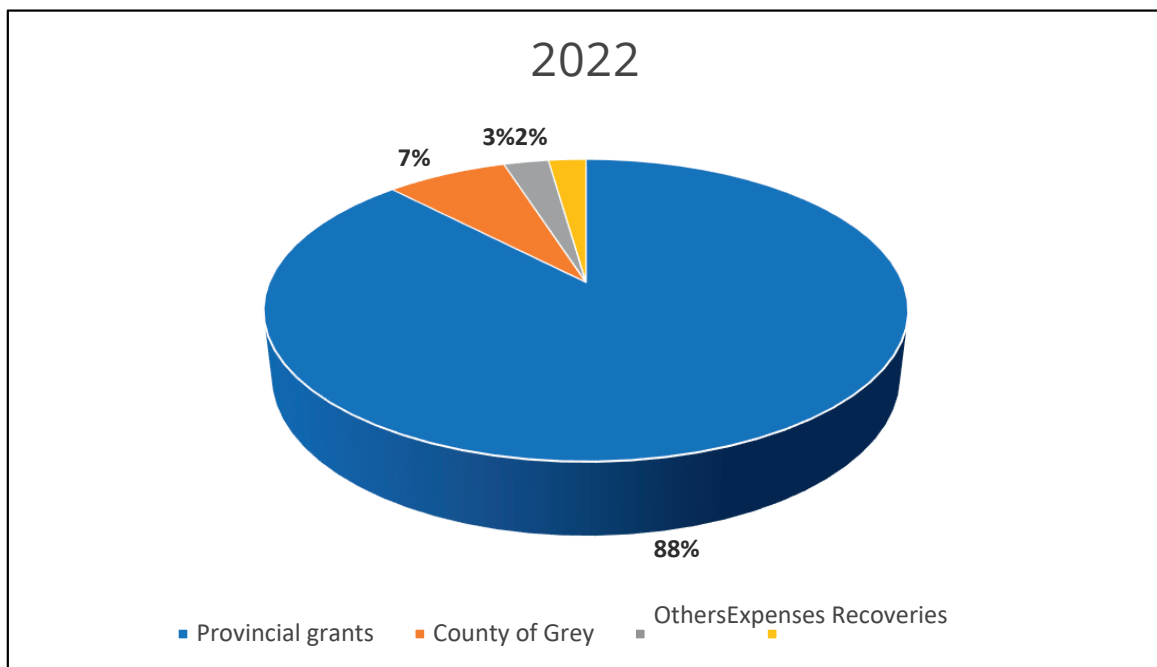
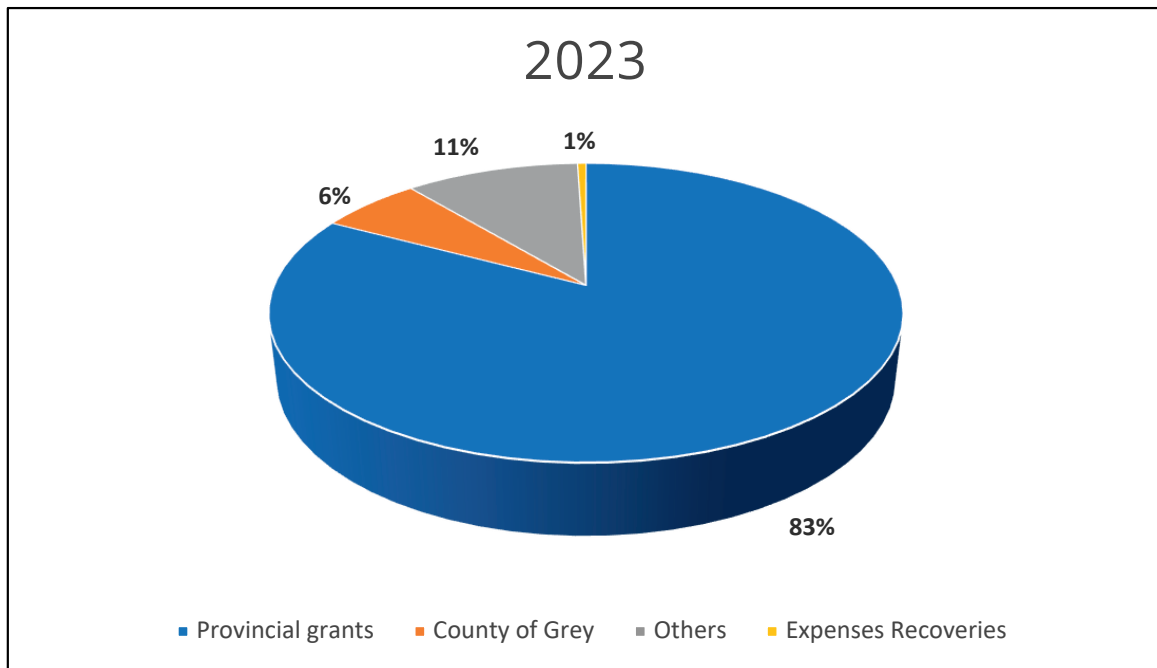
What we own		What we owe to others	
Cash	\$ 681,542	Amounts owed to suppliers	\$1,601,874
Accounts receivable	325,214	Deferred contributions	505,141
Prepaid Expenses	7,392		
			<u>\$2,107,015</u>
Capital Assets-Land & Building (net)	2,735,547		
Capital Assets-Equipment (net)	475,093	What we have for our future	
		Capital asset fund	2,091,637
		Operating fund	26,136
			<u>\$2,117,773</u>
	<u>\$4,224,788</u>		<u>\$4,224,788</u>

## How did we do this year

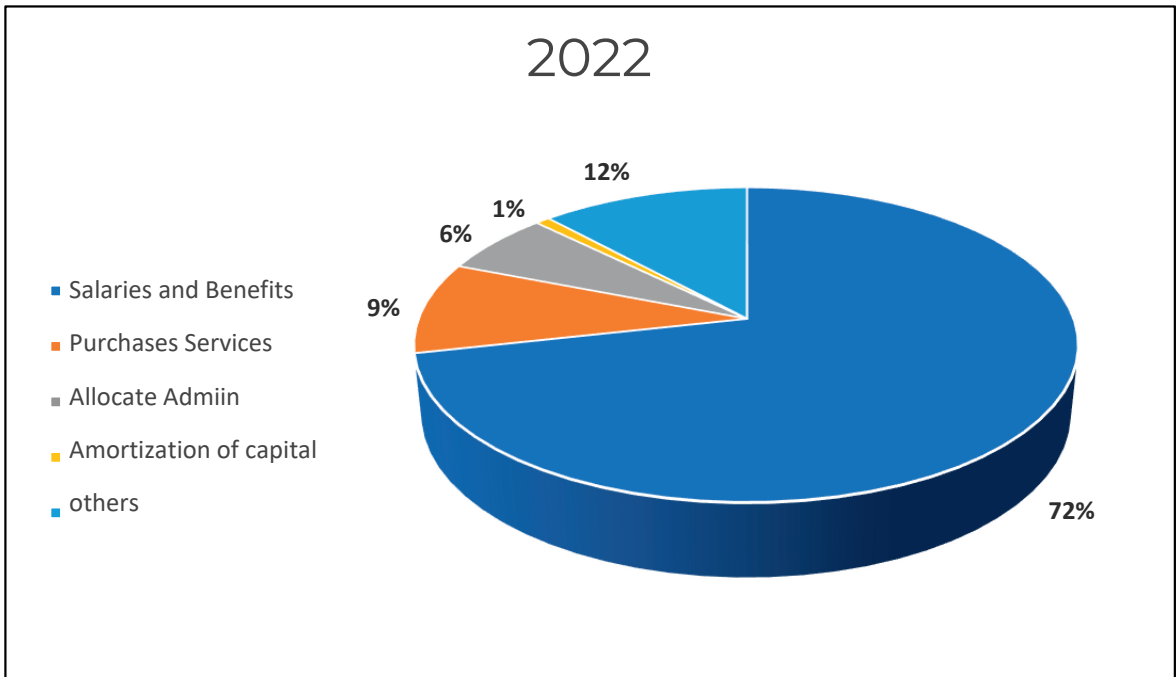
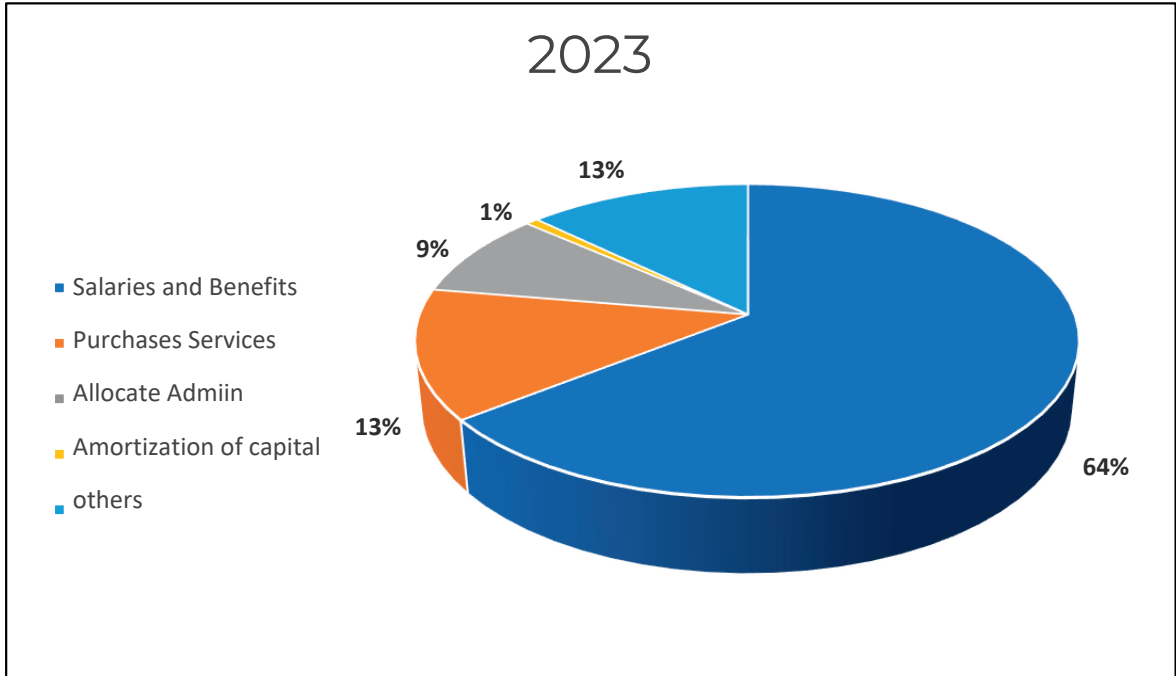
### How did we do this year?

<b>Revenue</b>	<b>2022</b>	<b>2023</b>
Funding	\$ 9,847,316	\$ 8,951,755
Funding Other	864,126	
Special Services at Home and Passports	929,241	870,696
County of Grey	803,405	811,425
Donations	158,870	75,298
Expenditure recovery	66,933	251,327
Other	339,452	208,021
Amortization of deferred contributions	17,512	17,512
	<b>\$13,026,855</b>	<b>\$11,186,034</b>
<b>Expenditures</b>		
Salaries and benefits	\$8,212,962	\$7,881,462
Staff Travel	97,350	145,281
Staff Training	24,446	49,556
Purchases services	1,711,761	1,037,309
Professional Fees	593,364	189,294
Supplies	177,472	193,249
Communications	41,976	37,719
Occupancy Costs	507,011	532,743
Vehicle operation	100,723	53,707
Amortization of Capital assets	90,434	90,437
Other	83,715	105,849
Allocate Administration	1,131,851	703,794
	<b>\$12,773,065</b>	<b>\$11,020,400</b>
Excess of Revenue over expenditure	<b>\$ 253,790</b>	<b>\$ 165,634</b>

# OPERATING REVENUE



# OPERATING EXPENSES





## CONTACT

769 4th Ave E  
Owen Sound,  
Ontario  
N4K 2N5

 519-371-9251

 [info@comlivos.on.ca](mailto:info@comlivos.on.ca)

 [communitylivingowensound.com](http://communitylivingowensound.com)