

2023-2024

# ANNUAL REPORT



## *Our Mission & Vision*

### OUR MISSION

We encourage and support each person to live active, rewarding and fulfilling lives in the community, by providing quality services, supports and opportunities that are determined by their dreams and goals.

### OUR VISION

A world where each person with a developmental disability lives their dreams and choices as a respected and valued contributor to community life.



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## 2023–2024 BOARD OF DIRECTORS

Tom Whelan, President  
(April 2023 – December 2023)

Shannon O'Neill, President  
(January 2024 – Present)

Shannon O'Neill, Vice President  
(April 2023 – December 2023)

Anne Dean, Vice President  
(January 2024 – Present)

Chengbo Qian, Treasurer

Anne Dean, Development Chair

Kaitlin Nesbitt, Quality  
Outcomes Committee Chair

Mags Shorey, Governance Chair

Paul Chiasson, Director at Large

Brian Delorey, Director at Large

Kevin Flynn, Director at Large

Peter Hnatiw, Director at Large

Brenda Kerr, Director at Large

## OUR CORE VALUES

For each person we support,  
we value:

### **Citizenship**

We enable citizenship for people we support through safe participation in all aspects of community life, respecting dignity and individuality.

### **Individuality**

We provide personalized care to the people we support, tailoring our programs and service to their individual needs.

### **Quality**

We provide programs and services with care and compassion by skilled, trained and dedicated staff.

### **Progressiveness**

We are adaptable and open-minded, constantly striving to improve our programs and services, applying best practices and creativity.

### **Accountability**

We accept responsibility for our actions and are answerable to the people we support, their families, our funding partners and each other.

# MESSAGE FROM THE BOARD CHAIR

SHANNON O'NEILL



Community Living Oakville (CLO) faced significant changes and challenges over the past year, while continuing to support persons with developmental disabilities through its enhanced programs and services. This past year was characterized by transformative milestones realized by the collective effort, dedication, and commitment of CLO's management, staff, volunteers, and Board of Directors. It is with great admiration and appreciation that I share these milestone achievements.

## Recent Achievements

As an organization, we responded to increasing fiscal pressures and uncertainty, maintained our focus on person-centered services, and supported a sustainable long-term organizational plan for growth. To that end, CLO started the year with the significant transition of closing Best Pack. For nearly forty years, Best Pack provided employment opportunities for individuals supported by CLO and operated out of 301 Wycroft since 2000, when CLO acquired the building. This shift for CLO is part of its journey towards providing person-centered support, as shown by the evolution of CLO's employment services programs, where each person is encouraged to seek meaningful employment as determined by their unique goals and dreams.

Another related milestone of transformation was CLO's move from 301 Wycroft and the successful sale of the building which closed on September 10, 2024, thanks to tremendous efforts by Tom Crawford, Chengbo Qian, Tom Whalen, and the Finance Committee, along with CLO management. CLO relocated to 1333 Dorval Drive in March 2024. This move strategically aligns with CLO's focus on increased community participation and inclusion for persons supported and financial stability for the organization. Though leaving 301 Wycroft brought mixed emotions, the sentiment underlines the feeling of connection within our community which will only be strengthened as we expand our reach through greater community participation for supported persons within Oakville. This accomplishment marks the end of an era and the beginning of new opportunities for CLO.

## Financial Challenges

Underlying the need for financial stability is the reality that CLO, like many organizations in the developmental services sector, has faced increasing financial pressure spanning decades with the pressure compounding more each year. Last year, CLO joined other community living organizations and agencies within the Sector in the #5ToSurvive campaign to advocate diligently for an increase to its base funding to address the chronic underfunding in our sector. In addition, CLO management and our Board of Directors met frequently with representatives from the Ministry of Children, Community, and Social Services (MCCSS) to address CLO's financial pressures. I would like to thank MCCSS for their financial support to CLO in January to assist us in maintaining our operations. Though our advocacy efforts garnered support from MCCSS to address the fiscal pressure of the last fiscal year, the modest increase in funding for our current fiscal year left CLO with few alternatives, but to reduce staff and close one of its homes. This result highlights the importance of both the impact of our collective advocacy efforts and the critical need to continue to pursue avenues of financial stability for our organization.

## Strategic Planning

With these challenges in mind, our Strategy and Transformation Committee undertook a comprehensive approach over the last year to develop a new Strategic Plan to support the unique challenges and goals of persons supported and adapt to the reality of the uncertain environment within which CLO operates today. While our Core Values have not changed, we redefined our strategic themes to enable persons supported to achieve their dreams and goals and invest in a sustainable future for CLO. The strategic themes for the next three years are: 1) Person-Centered Services, 2) Community Partnerships & Engagement,

3) Talent Development, and 4) Financial Stability. We are confident that these new themes and corresponding objectives outlined in the Strategic Plan will best guide CLO to adapt, evolve, and excel in carrying out its Vision and Mission. This plan results from feedback, recommendations gathered from focus groups with supported persons, family and friends of CLO, staff, and management, and recommendations made through the accreditation process with the Council on Quality and Leadership (CQL). Thank you to the Strategy and Transformation Committee and all those involved in this process.

### **Governance and Recruitment**

Another notable achievement this year was the culmination of the Board's review of CLO's governing documents and its by-laws as required for compliance with Ontario's Not-for-Profit Corporations Act (ONCA), an initiative led by the Governance Committee. The Governance Committee reviewed the by-laws thoroughly to ensure compliance with ONCA and verify they reflect our organization's existing and future direction. The last step in completing ONCA compliance will be for the CLO's membership to approve the updated by-laws and Articles of Amendment at the AGM on September 26, 2024, and once approved CLO will begin its next year ONCA compliance.

The Governance Committee also led the recruitment of our new Board Members. On behalf of the Board, I would like to extend a warm welcome to Danielle Hamptom-Davies, Gayatri Aravind, and Michelle Marsden, who will be joining our Board in 2024-2025. Each of these individuals brings valuable knowledge, skills, and experience which will prove to be valuable additions to our Board.

### **Ongoing Commitments**

Our Quality Outcomes Committee and Development Committee remained core pillars of our Board's oversight and stewardship of CLO. In the face of organizational transitions, our Quality Outcomes Committee ensured that we remained committed to providing enhanced services and focused on achieving outcomes for each person supported. Equally, our Development Committee continued to oversee the execution of CLO's Marketing Strategy and Marketing Plan while working creatively to pursue alternative avenues of funding to support CLO's programs and services despite the financial pressures CLO faced.

This was a busy year for our Board of Directors, and I would like to take a moment to thank each of our Directors, particularly the Chairs of our committees (Chengbo Qian, Anne Dean, Mags Shorey, Jennifer Blue, and Kaitlin Nesbitt) for their leadership and contributions. While navigating increasing pressures and uncertainty, we accomplished many transformative initiatives that have laid the groundwork for a future supporting our Vision and Mission. I would like to specifically thank our departing Board members Mags Shorey and Brenda Kerr for their years of service and dedication. In her role as Governance Chair, Mags brought in-depth knowledge and expertise to leading board recruitment and development along with good governance practices which have had beneficial impacts on our organization. Brenda Kerr has also been integral to our organization through her leadership roles as Golf Committee Chair, prior Development Committee Chair as well as a long-standing volunteer with CLO for many years before joining the Board.

Lastly, I would be remiss if I did not extend my sincere thanks to Tom Whalen for his long-standing leadership and dedication as CLO's past Chair. Tom led our organization through the challenging years of COVID-19, completing his three-year term as Chair in January 2024. His commitment to person-centered service was always at the forefront of his leadership and guidance. We are fortunate that Tom will remain a valued member of the Board.

On behalf of the Board, I want to sincerely thank our management team and front-line staff, for their tireless devotion to carrying out the Vision and Mission of CLO each day. You are the champions of our Vision and Mission and your commitment to ensuring that each person supported may live their dreams is truly appreciated.

In closing, I would like to thank our members, families, friends, volunteers, and all supported persons for your support as we continue to adapt and evolve to best serve persons supported by CLO. Together, we are fostering an inclusive, equitable, and diverse community where every person supported is encouraged to live rewarding lives and fulfill their dreams. As we continue our journey of transformation, we look forward to growth and opportunities so that collectively and individually we will continue to dream, inspire, and belong!

Thank you,

**Shannon O'Neill**  
**Chair of the Board of Directors**

# SPOTLIGHT ON JULIE

Julie has been a cherished member of the Community Living Oakville family since she was about 14 years old. Over the years, we've had the privilege of watching Julie grow into a vibrant and joyful person, with a personality that lights up any room.

Julie's love for music and dance is infectious. She can often be found dancing to her favourite hip-hop, jazz, and pop tunes, bringing energy and happiness to those around her. When she's not on the dance floor, Julie enjoys doing puzzles, participating in the Connex program, and expressing herself through art.

What truly sets Julie apart is her incredible sense of humour. She's always smiling, laughing, and spreading positivity wherever she goes. Julie's determination to overcome the many challenges she has faced, is truly inspiring.

Recently, Julie spent a week at a cottage in Muskoka, and her love for adventure and travel, has now expanded to Julie expressing she would like to visit Disney World and an All-Inclusive Resort in the near future.

Julie is also committed to giving back to the community, and volunteers her time delivering meals with the Meals on Wheels program.

Julie's parents are the most important people in her life, and their love and support have been instrumental in her journey. Those who know Julie all share their appreciation for her thoughtful nature. Julie checks in on those that she is close to, and her laughter and kindness never fails to lift people's spirits. Julie's journey beautifully reflects the positive influence of the support she's received from Community Living Oakville.

In a single sentence, Julie is a kind and loving person who thrives in the company of others, spreading joy and warmth wherever she goes. We are honoured to continue to support Julie on her journey, celebrating her successes and looking forward to the dreams she will achieve next.



# MESSAGE FROM THE EXECUTIVE DIRECTOR

**ALEXANDRA  
HOECK-MURRAY**



It has been a momentous year for Community Living Oakville (CLO) as we reflect on 2023–2024, a period filled with growth, change, and opportunities. As an organization dedicated to supporting people with developmental disabilities in Oakville and the surrounding Halton community, we are proud of the progress we have made together.

One of the key initiatives this year was the development of our strategic plan. This three-year plan is centered around four key themes: Person-Centered Services, Community Partnerships and Engagement, Talent Development, and Financial Stability. The foundation of this strategic plan is deeply rooted in our mission, vision, and values, ensuring that we continue to enrich the lives of the people we support. The goals and opportunities identified were the result of insights gathered from various stakeholder focus groups, and we are immensely grateful to all participants: people supported, families, staff, management, and our Board of Directors for their contributions. A special thank you goes to Susan Ludwig from SLudwig Consulting for facilitating the focus groups, leading meaningful discussions, and helping to organize the results effectively.

One of the most significant milestones this year was the closure of Best Pack in October 2024. Since opening its doors in 1984, Best Pack provided employment opportunities for people supported by CLO as well as members of our broader community. For the past 10 years, Best Pack has been led by Ivan Bogdanovski. Although CLO no longer owns and operates the business, Ivan has taken over the company, and we extend our heartfelt gratitude for his dedication and wish him all the best in his future endeavors. We encourage everyone to continue supporting Best Pack for their packaging and assembly needs.

Another big change came with our office move from 301 Wyecroft to our new location at 1333 Dorval Drive. In March 2024, our administrative, management, and senior management teams made the transition to our new space. While the sale of 301 Wyecroft and new beginnings was bittersweet, as it had been home to many cherished memories, our move represents how far we have come as an agency. This new rental property, which will be home for the next six years, symbolizes our commitment to progress and to ensuring that the people we support live full, enriched lives. This move also reflects our shift away from programming in large, segregated groups. Instead, we've seen incredible growth as people supported by CLO have expanded their networks, developed social roles, secured employment, and achieved greater independence.

Like many organizations in the developmental services sector, CLO has faced financial challenges over the past year. We have been tireless in advocating for sufficient funding to maintain the high quality of services our community deserves. Alongside our dedicated Board of Directors, we have worked closely with local MPPs, voiced our concerns to the

Minister, and engaged with the Ministry of Children, Community, and Social Services (MCCSS) to address financial pressures. Unfortunately, these challenges have required us to make difficult decisions, including laying off staff and the closure of one of our homes. Throughout this process, we have always prioritized the best interests and safety of the people we support, and those affected by the closure have the opportunity to transition to other locations within CLO.

We have also been active participants in advocacy campaigns, including the #5toSurvive initiative led by Community Living Ontario. This campaign highlighted the importance and need to increase base funding across developmental service agencies across Ontario. I want to extend a thank you to Community Living Ontario for their relentless advocacy on behalf of agencies like ours across Ontario, and to MCCSS for their ongoing partnership and support. Our collaboration has helped us navigate these challenges while ensuring the people we support continue to receive the care they need.

Our Xplore Employment team also played a significant role in advocating for employment services for people with developmental disabilities. Partnering with the Ontario Disability Employment Network (ODEN), allows us to have a greater voice and ensure employment services-related changes are equitable for the people we support and those across the province. Thank you to ODEN for your continued advocacy and partnership.

At the core of everything we do is the health, safety, and well-being of the people we support. CLO remains focused on enhancing our services and working alongside other organizations to create greater capacity for those in need. We recognize the many people in Halton and across Ontario who are waiting for services or facing crises. Through our Xcel Fee for Service and Xplore Employment programs, we have welcomed new families this year, and I would like to extend a heartfelt thank you to these families for entrusting us with supporting their loved ones.

To our community partners, stakeholders, and local businesses: thank you for the opportunities you have provided the people we support. Together, we have strengthened both our agency and our community as a whole.

Finally, I want to acknowledge the incredible staff at CLO. You are the backbone of our organization, taking on roles as supporters, teachers, advocates, and mentors. Your dedication does not go unnoticed, and I am deeply grateful for all you do. To our volunteers and students, thank you for your time and commitment to CLO. To our management and senior leadership team, your guidance through challenging times, successes, and change has been remarkable.

A special thank you goes to our Board of Directors for their support, leadership, and countless hours of volunteerism throughout this busy year. In particular, I would like to recognize and thank our outgoing Board Members, Brenda Kerr and Mags Shorey, for their years of service and dedication to CLO. Your guidance and support have been invaluable, and we are incredibly grateful for your contributions.

Most importantly, to the people we support: thank you for motivating us and teaching us the true meaning of resilience. It is an honour to be a part of your journey, and we are privileged to support and share in the important moments of your lives.

Together, we will continue to dream, inspire, and belong.

Warm regards,

**Alexandra Hoeck-Murray**  
**Executive Director**

# DJ'S STORY

Meet DJ! He's a massive Dallas Stars fan and has a passion for ice hockey and ball hockey, it's no wonder he dreams of meeting hockey legend Jason Spezza. When he's not cheering for his sports teams, DJ is likely watching Transformers or Batman, two of his top movies - and the only thing that would make for a better evening would be watching movies while having one of his favourite dishes, pasta or steak.

DJ's journey with Community Living Oakville started in the fall of 2021, and since then, he's been unstoppable. He enjoys playing baseball, bowling, and ball hockey, and one of his biggest dreams is to study and go to college, with an ultimate goal of becoming a firefighter.

Cars and trucks are another one of DJ's passions, especially the powerful Dodge Hellcats and RAM trucks. His growing collection of model cars holds special meaning for him, as it connects back to his childhood when he didn't have much of his own. Now, these collectibles are a source of pride and joy.

One of DJ's proudest achievements is getting his boat license. He volunteers at CharterAbility, where he assists with tying up boats, helping passengers board, and ensuring everyone's safe and secure before pushing the boat off. He's also a talented cook, often whipping up old family recipes that remind him of home.

DJ loves his time at Xcel, especially trips where he can dive into history. When he's not busy, you might find him adding to his ball cap collection, or simply enjoying some TV time. With such a wide range of interests, DJ's future is looking bright! #DreamInspireBelong



# TREASURER'S REPORT

Over the last year, Community Living Oakville (CLO) has continued to support youth and adults with intellectual disabilities in a fiscally sound manner. Our focus remains on offering high-quality, individualized, and community-based support and services while responsibly managing public and donated funds.

Total revenue for the fiscal year 2023-2024 was \$19.2 million. Approximately 77% of this revenue came from the Ministry of Children, Community and Social Services (MCCSS). The remaining revenue was provided by ODSP, FEDCAP, the United Way of Hamilton and Halton, grants from foundations, fee-for-service programs, donors, clients, and entrepreneurial ventures. Our total expenses were \$19.4 million, of which 94% were spent on providing programs to the people in our care and in the community.

We are grateful to the Ministry for ensuring we could keep our doors open. We are also thankful for the other funders and foundations, clients, donors, and businesses that care for the community by supporting CLO.

Financial results for CLO are prepared by our Finance Department staff and presented in accordance with the Chartered Professional Accounting Handbook. These financial results have been audited by our external auditors. Audited financial statements, the Auditor's Report, and notes pertaining to our financial statements are available upon request through the CLO Executive Office.

The 2023-2024 fiscal year saw several significant financial milestones. First was the shutdown of Best Pack Packaging. For nearly 40 years, Best Pack provided employment opportunities to support people and members of the community. However, in recent years, various changes meant that it was no longer aligned with CLO's core mission. As a result, Best Pack ceased operations effective October 2023.

The second major milestone was the divestment of our 301 Wyecroft facilities. In recent years, the board, along with the management team, engaged in strategic planning for our facilities. It was determined that our home base at 301 Wyecroft no longer fits our needs, as our activities shift more towards integration with our local communities. Consequently, CLO shifted its operations to a rented facility, and 301 Wyecroft was marketed and sold. A special thank you goes to Mr. Tom Crawford, who championed both transformation initiatives mentioned.

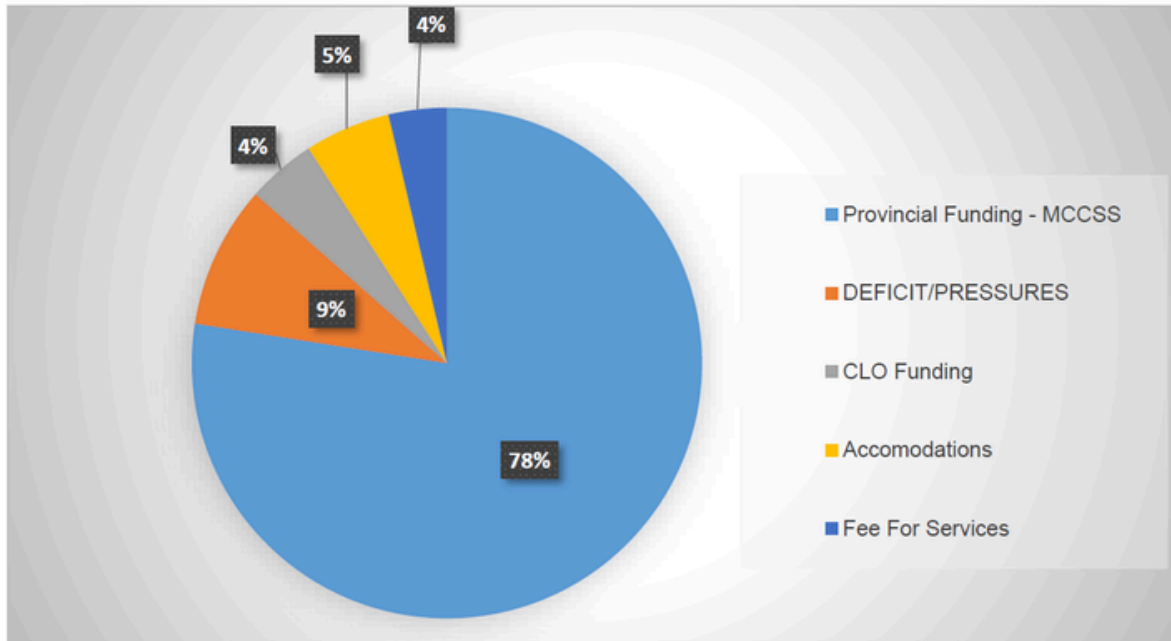
I must also recognize the very strong and talented finance committee. We meet monthly to review the financial results of CLO operations, Capital, and Best Pack. The meetings are lively and challenging, and I believe they fully support our Executive Director, Alexandra Hoeck Murray, and her team. Tom Crawford, Tom Whelan, Paul Chiasson, Peter Nesbitt, Barry Thomson, our ED Alexandra Hoeck Murray, and Suresh Tharma, our Director of Finance, all play a key role in overseeing our financial position.

Regards,

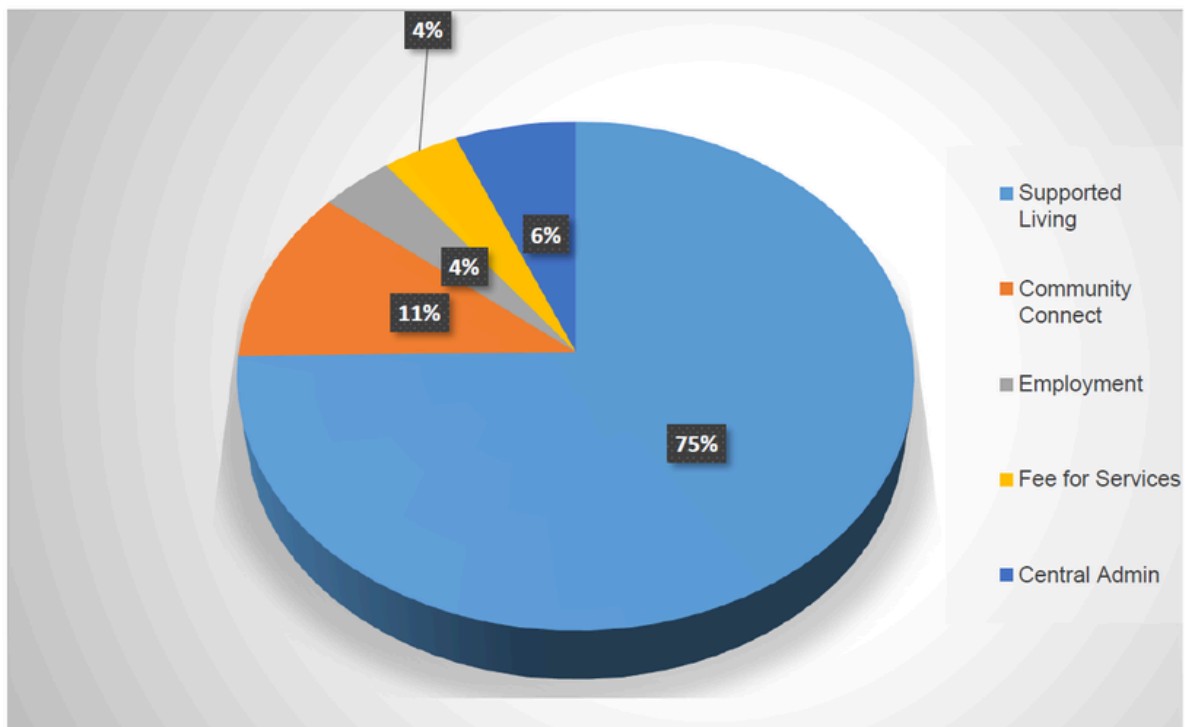
**Chengbo Qian**  
**Treasurer of the Board of Directors**

# 2023-204 FINANCIAL ACTIVITIES AND SUPPORT

## Sources of Revenue



## Expenses by Program



# THANK YOU TO OUR GENEROUS DONORS

## ADVOCATE (\$100,000 – \$249,999)

- Ontario Trillium Foundation
- United Way Halton & Hamilton (UWHH)

## LEADER (\$50,000 – \$99,999)

- Gerald and Margaret Sutton & their Foundation
- RBC Foundation

## BENEFACTOR (\$25,000 – \$49,999)

- Dean Piett
- June and Ian Cockwell
- Lori Szwarc
- Oakville Community Foundation
- Robitaille Charitable Foundation

## PARTNER (\$10,000 – \$24,999)

- New Horizons
- Liz and Barry Thomson
- Peter and Patti Hnatiw
- Service Canada
- The Balogh Family Foundation  
*(a fund held within the Oakville Community Foundation)*
- The Peter and Petrina Nesbitt Family Fund  
*(a fund held within the Oakville Community Foundation)*

## SUPPORTER (\$5,000 – \$9,999)

- Augy and Anna Carnovale
- Christine Elliott
- Mags Shorey  
*(a fund held within the Oakville Community Foundation)*
- Mercedes-Benz Oakville
- Shilpa Madon
- Think Best Practice
- Vince and Elizabeth Molinaro
- WB Family Foundation

## CONTRIBUTOR (\$2,500 – \$4,999)

- Birnie Electric
- Blazer for Men
- Bonnie and Terry Jackson
- C and C Custom Contracting
- Donna and Aleks Novakovic
- Eve and Peter Willis
- Foundation For Human Development
- Jane Tynan-Byrd
- Knar Jewellery
- Lions Club Of Oakville
- Mark and Vanessa Barr
- Nancy Enns
- Neely Auto Service Ltd
- Tamarack Lumber Inc
- Tom and Michelle Whelan

## SPONSOR (\$1,000 – \$2,499)

- Anne Vandewall
- Anne Dean
- Bill Francis
- Brenda Kerr
- Brian and Shelley Delorey
- Bronwen Cockcroft
- Cam Reynolds
- Cheney Window & Door Specialists
- Elva Telfer
- Eve and Peter
- Frank and Azniv Lochan
- Henry And Laura Pervila
- Jackson Family Lights
- JaysCare Foundation
- Jim Aziz
- Joanne Peters
- Joe Hutter
- Knights of Columbus
- Lesley McLelland
- Linda Vervoorn
- Lorenzo Morra
- Margaret White
- Marilyn Weber
- Neil L Smith Memorial Fund
- Oakville Centre for Vision
- Paul Chiasson
- Paul Donolo
- Robert & Jennifer Doyle
- Sally Mitzel
- Scott Hobson
- Simon Beayni
- Stephanie Woodward



Dream • Inspire • Belong

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**CELEBRATING**  
**70**  
**YEARS OF INCLUSION**

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CHARITABLE REGISTRATION #  
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We wish to extend our gratitude to all donors, including those not listed who wish to remain anonymous. Every effort has been made to ensure the accuracy of this list. If you discover an omission or error, please accept our apologies and notify [andrea.interior@oakcl.org](mailto:andrea.interior@oakcl.org). We will ensure that this is rectified in the next Annual Report.

