



Dream • Inspire • Belong

2022-2023

# 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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## **2022 2023 BOARD OF DIRECTORS**

Tom Whelan, President

Shannon O'Neill, Vice President

Chengbo Qian, Treasurer

Anne Dean, Development Chair

Mags Shorey, Governance Chair

Peter Hnatiw, Director at Large

Paul Chiasson, Director at Large

Brian Delorey, Director at Large

Kevin Flynn, Director at Large

Brenda Kerr, Director at Large

Kaitlin Nesbitt, 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 PRESIDENT

**TOM WHELAN**



As an organization, we have faced many challenges over the past year, whether due to the lingering effects of the pandemic, staffing shortages, or other inflationary pressures. These have been tough times for our teams that work tirelessly to provide individualized supports for each person on a day-to-day basis. In acknowledgement of the current environment, it is important to pause and reflect on the successes of each person supported by CLO, and to express our gratitude to all those that are key to the services and supports we provide. On behalf of the Board, I want to express my thanks to our management team and our front-line staff for their commitment, passion and diligent care that is evident every day.

Organizationally, we have responded to the changes and pressures we face by initiating a journey of transformation, with the goal to enhance the services and supports we provide to be more person-centred and community-based. We believe this approach provides the best outcomes for all persons we support. The pandemic spurred changes to a more community-based focus for our services, which has been very well received, and has encouraged us to be open-minded about further changes. We know this journey will take time as our resources are stretched, but it is critical that we remain committed to achieving the right outcomes for each person that we support. To this end, this year the Board established a new standing committee that, together with management and other stakeholders, is intended to lead our ongoing organizational transformation efforts. This initiative is aligned with the Ministry of Children, Community and Social Services' sector-wide transformation initiative, known as "Journey for Belonging". CLO is a proactive and forward-looking organization, driven by the agenda and direction that will be shaped through our new Strategy and Transformation Committee.

Our Board of Directors has been busy and engaged this past year as it provides strategic oversight and stewardship of the agency. We welcomed one new Board member this year (Anne Dean) who has been a very active contributor to the Board from day one. Anne spearheaded the development of our new CLO Marketing Strategy and Marketing Plan. She also took on the role as Chair of our Development Committee. Under Anne's leadership, this committee has established two important focus areas: Strategic Community Partners, and Family & Friends Engagement that will help further our marketing goals. Thank you Anne for your leadership of our Development initiatives.

As you know from past reports, the Board operates through its regular full-Board monthly meetings and through four existing Board committees: Development, Finance, Governance and Quality Outcomes, along with our new Strategy and Transformation committee. I want to thank the Chairs of each of these committees (respectively, Anne Dean, Chengbo Qian, Mags Shorey, Kaitlin Nesbitt, and Shannon O'Neill) for their important role in driving the actions of their committees, as they collectively have accomplished many important activities this past year.

Our Strategy and Transformation committee has recently been formed, and will take the lead in the coming months as we start the update to our Strategic Plan, which is renewed every 3-4 years. The work to update our Strategic Plan will begin this fall and should conclude in the spring. The Quality Outcomes Committee has focused on oversight of quality enhancement initiatives, and of the ongoing work of management as they implement both our Accreditation Plan and our Strategic Plan.

The Governance Committee led the Board nominations process, resulting in the nomination two talented candidates to join our Board this fall. We look forward to continuing with new nominations to the Board each year. The committee has also continued the comprehensive review of our By-Laws as we work to align with the new Ontario Not-for-Profit Corporations Act requirements. Once fully drafted and vetted by the Board, the updated By-Laws will be brought forward to a Special Meeting of Members for approval, which is planned to be in advance of the AGM in 2024.

Our Finance Committee meets monthly to provide effective financial stewardship on behalf of the Board, including supporting the Finance department as they continue to progress with the newly implemented financial systems, providing input on improvements to our financial reporting. The committee has also worked with our external auditors who have recently completed their annual review and delivered the audited financial statements.

I would be remiss if I didn't also thank the Ministry of Children, Community and Social Services, that helped in our last fiscal year with additional funding to address pressures driven by changing needs of some supported persons, along with funding for added costs due to the pandemic. These "pressures funding" amounts are on top of the base funding that Community Living Oakville receives each year to enable us to deliver our services. We are actively working with the Ministry to secure additional funding for fiscal 2023/24 and going forward as we are experiencing significant cost pressures due to inflation and staffing shortages.

Finally, we are pleased to be nominating Jennifer Blue and Michael O'Connor as candidates to join our Board this fall, bringing a rich diversity of experience, perspectives and relationships that will help move us forward. At the same time we will be saying goodbye to two valued Board members: Kevin Flynn and Peter Hnatiw. While ongoing renewal of the membership of our Board of Directors is critical for good governance and the vitality of the Board, we will certainly miss both Kevin and Peter. Thanks again to them both for their past service and ongoing commitment to CLO!

In closing I would like to thank our members, families, friends and staff for your support as we continue to provide the best service possible to the persons we support. Your engagement in helping us to achieve our Mission is vital. We continue to encourage involvement and support from all families and friends of CLO. If you would like to get involved as a volunteer or to share your ideas to help us further our mission, please do not hesitate to reach out to Alexandra or members of her management team.

Thank you!

**Tom Whelan**  
**President and Chair of the Board of Directors**

# JIM IN THE SPOTLIGHT



Jim is amazing – quiet – thoughtful – loves to laugh. He is deeply caring and the wellbeing of those around him is paramount. Few things trouble Jim more than someone not being 'okay'.

He would be an amazing historian were the world a different place. He loves pirates – everything pirate – the gold and shiny, the adventure, the ships, the culture and likely the ocean.

Jim's parents were incredible advocates, and though they have both passed, he has no shortage of family to ensure he receives the best care possible. Jim has eight sisters, all who adore their younger brother and want what is best for him.

He lives at a home on the West side of Town – which he shares with four other gentlemen. You may see him out at the grocery store, yoga studios, mini putt, golf courses, bowling alleys, movies theaters and eating at his favorite restaurants. At home he relaxes in the company of peers and when he desires solitude, he will flip open a copy of National Geographic and disappear into the adventure on the pages.

Jim is an uncle and holds a number of social roles in his family. Few know what it's like growing up with eight sisters but when you see the love he has surrounding him, one cannot help but be envious – maybe even jealous. Lucky guy! And he knows it.

# MESSAGE FROM THE EXECUTIVE DIRECTOR

**ALEXANDRA  
HOECK MURRAY**



I am delighted to present our Annual Report for the year 2022–2023, a year marked by remarkable achievements and an unwavering commitment to our mission of serving people with developmental disabilities. With immense pride and gratitude, I share the extraordinary strides we have taken over the past year.

One of our most significant accomplishments this year was the reaccreditation by the Council of Quality and Leadership (CQL). This recognition reaffirms our dedication to service quality and exemplifies our commitment to providing exceptional support and services.

Our Quality Team has played a pivotal role in upholding our standards of excellence by conducting workshops covering vital training on rights and Personal Outcome Measures for our staff and the people we support. These workshops enrich our practices and empower the people we serve to advocate for themselves. Additionally, our Quality Team has made substantial progress in data tracking and analysis, enabling us to identify trends, service gaps, and make continuous improvements to enhance quality of life.

Another exciting update from this past summer, was unveiling our new agency tagline, "Dream, Inspire, Belong." This tagline reflects our shared aspirations, chosen by our stakeholders to embody the collective dreams and inspirations that drive our mission.

Amid funding challenges, our team has tirelessly worked to secure non-governmental funding to enhance the quality of life for the people we support. Their dedication ensures that we can continue to provide the best possible services with limited resources. This is an area of priority for us, in which we will continue to focus on.

To expand our presence within the community, we have developed a comprehensive marketing plan aimed at increasing our membership, donor base, and community connections. Raising awareness and building partnerships will create opportunities for people we support to access the services they need. Within outreach, advocacy also remains at the core of our mission, and we continue to work tirelessly to ensure that the voices of those we support are heard.

In the last year of our strategic plan, we recognize our achievements across our three strategic themes: Programs and Services, Community Inclusion and Engagement, and Culture and Capacity. Our team's dedication has driven significant progress in these areas. We have adapted our services to meet the evolving needs and goals of the people we support, offering person-centered services at various stages of life, from our Summer Teen Adventure Program to Seniors Connections opportunities. Internally, we have also made substantial progress in internal movements and living arrangements, despite limitations in congregate care settings, to better align with people' goals and accessibility needs.

This year, we have also focused on the importance of creating a strong workplace culture. This has included establishing retention initiatives for staff, recruitment efforts and the development of our CLO Diversity Committee. This committee has enriched our agency by bringing together members representing various cultures and service areas, promoting diversity in the workplace. As many are aware, recruitment has posed various challenges and we advocate for skilled and trained staff within our sector in collaboration with Halton agencies and the Ministry.

In closing, I want to express deep appreciation to the people we support for entrusting us with their dreams and aspirations. Your faith in us drives our work and inspires us to reach new heights.

We extend heartfelt gratitude to the Ministry of Children Community and Social Services for their continued support in navigating funding challenges and evolving needs. We also appreciate the tireless advocacy efforts of Community Living Ontario, Oasis, and the Ontario Disability Employment Network (ODEN) on behalf of the people we support and our sector.

In addition, I would like to acknowledge and thank our dedicated staff, managers, senior leadership team, students, volunteers, and esteemed Board of Directors for their unwavering support and advocacy.

As we look ahead, optimism and determination guide our path, and together, we will continue to dream, inspire, and belong.

Warm Regards,

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

# SARAH'S STORY



We are pleased to highlight the remarkable journey of Sarah, a cherished member of Community Living Oakville for approximately six years. Over the past year, Sarah has experienced a profound transformation, describing herself as significantly happier and more fulfilled.

Sarah's transition to an Enhanced Supported Independent Living home has afforded her an array of opportunities that closely align with her aspirations and goals. Her participation in the Community Connect Hub has been particularly enriching, allowing her to engage in activities such as swimming, enjoying the outdoors at local parks, and visiting the mall.

Notably, Sarah has embraced the efficient and secure public transit system in Oakville, which has empowered her to actively participate in community life, connect with friends, and enhance her overall sense of independence. Her commitment to adopting a healthier lifestyle and increased engagement in community activities has contributed to her being more joyful and outgoing.

During the past summer, Sarah's involvement in CLO's baseball team was a testament to her enthusiasm and sense of camaraderie. This collaborative initiative, in partnership with the Jay's Care Foundation and four Halton agencies, showcased Sarah's dedication and the strong bonds she cultivated with her peers as they cheered each other on.

Furthermore, Sarah took the initiative to collaborate with CLO's Xplore Employment team, seeking to acquire new skills and gain valuable work experience. Her appreciation for the job coaching she received is evident, and she aspires to continue developing her independence through further vocational pursuits.

Sarah's remarkable progress underscores the potential for personal growth and fulfillment within our community, and her unwavering determination sets her apart, serving as a source of inspiration for her peers and encouraging others to strive for greater achievements.

# TREASURER'S REPORT

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

Total revenue for fiscal year 2022-2023 was \$19 million. Approximately 78% of this revenue came from the Ministry of Children, Community and Social Services (MCCSS). Part of the remaining balance was provided by several grants, including Trillium Foundation and United Way of Hamilton and Halton, fees for service programs, Passport funding and accommodation fees from clients.

Through our fundraising efforts, our entrepreneurial ventures, and interests earned on investments, we have contributed over \$0.6 million to deliver the programs efficiently.

As we collectively worked to recover from an ongoing pandemic, funding provided by MCCSS was essential to keeping people safe and supported. This included \$0.47 million received through COVID-19 and \$1.2 million for \$3 dollar permanent wage enhancement for front-line staff.

Total expenses for fiscal year 2022-2023 were \$19.4 million. 92% of the expenses directly related to providing Supported Living and Community Participation Supports, 1% for Employment and respite services and 7% for administration and management costs.

Community Living Oakville now offers CAAT DBplus defined benefit pension plan for all employees and provides 100% matching to pension contributions to their employees. As a DBplus member, CLO employees are freed from the stress and risks of making investment decisions for their retirement saving plans. They will also enjoy the certainty of predictable and secure lifetime pension payments, plus other valuable retirement features, such as inflation adjustment, survivor benefits, flexible retirement options, and more.

Financial results for CLO are prepared by our Finance Department staff, which are 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.

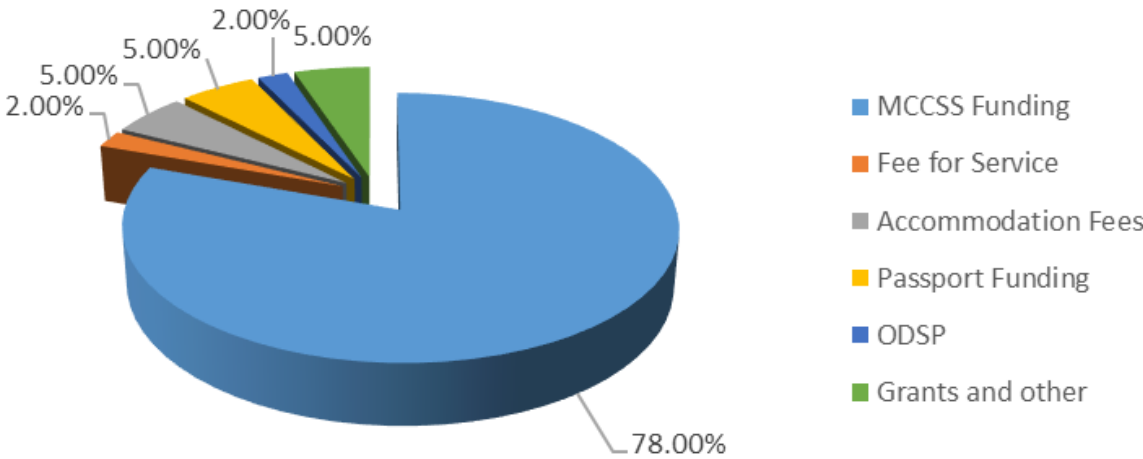
I must also recognize the very strong and talented Finance Committee. Tom Crawford, Tom Whelan, Paul Chiasson, Peter Nesbitt, Barry Thomson, our Executive Director, Alexandra Hoeck Murray and our Director of Finance, Suresh Tharma, all play a key role in overseeing our financial position. We meet monthly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

Regards,

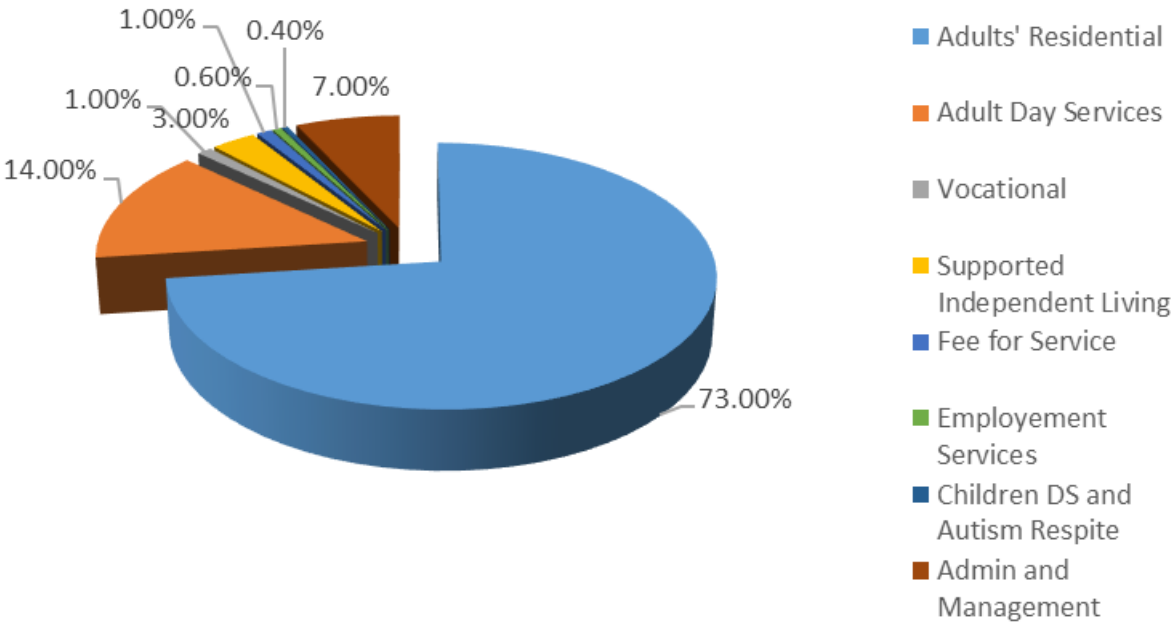
**Chengbo Qian**  
**Treasurer of the Board of Directors**

# 2022-2023 FINANCIAL ACTIVITIES AND SUPPORT

## Sources of Revenue



## Expenses by Category



# 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
- June and Ian Cockwell
- RBC Foundation

## BENEFACTOR (\$25,000 – \$49,999)

- Halton Region
- Oakville Community Foundation
- Robitaille Charitable Foundation

## PARTNER (\$10,000 – \$24,999)

- Dean Piett
- Lori Szwarc
- New Horizons
- PCMnow.com Inc.
- Service Canada
- Shilpa Madon
- The Balogh Family Foundation  
*(a fund held within the Oakville Community Foundation)*
- The Co-operators Community Funds

## SUPPORTER (\$5,000 – \$9,999)

- Birnie Electric
- Donna and Aleks Novakovic
- Eberhard Scherkus
- Foundation For Human Development
- Liz and Barry Thomson
- Mags Shorey  
*(a fund held within the Oakville Community Foundation)*
- Mercedes-Benz Oakville
- Norma and Paul Marchetti
- Pasquale DiCapo
- Petro-Canada CareMakers Foundation
- The Peter and Petrina Nesbitt Family Fund  
*(a fund held within the Oakville Community Foundation)*
- WB Family Foundation

## CONTRIBUTOR (\$2,500 – \$4,999)

- Blazer for Men
- Civitan Club of Oakville
- Claudia DiPaola
- Eve and Peter Willis
- John Graham
- Knar Jewellery
- Mark and Vanessa Barr
- Pat Dietrich
- Peter and Patti Hnatiw
- Rattlesnake Point Golf Club
- Tom and Michelle Whelan
- Verace Italian Restaurant

## SPONSOR (\$1,000 – \$2,499)

- Ammar Aljoundi
- Andrew Long
- Anne Dean
- Barbara Furlong
- Bill Perras
- Brian and Shelley Delorey
- Brian Hill
- Bruce Galloway
- C and C Custom Contracting
- CI Investments
- Cross Avenue Auto Service
- David Laprise
- Debbie Birnie
- Doug & Alison Bell
- Frank A Dunn
- Frank Lochan
- IPEX Management Inc
- Isabella Evans
- Jade Shyback
- JoAnn Daxner
- Kelly Weinstein
- Kerri Sharp
- Kevin Flynn
- Knights of Columbus
- Lesley McLelland
- Lorenzo Morra
- Marilyn Weber
- Michael Whelan
- Nancy Guay
- Neelam and Shawn Koorshed
- Paul Chiasson
- Paul Donolo
- Scott Hobson
- Tamara MacCormack
- Tara Pencak



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Charitable Business # 107790552 RR0001

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.interioreoakcl.org](mailto:andrea.interioreoakcl.org). We will ensure that this is rectified in the next Annual Report.