

MCSS Releases Report on Developmental Services Consultations

In her year-end letter, the Honourable Madeleine Meilleur, Minister of Community and Social Services, reflected on many of the changes which have been implemented in the Developmental Services Sector in 2006, including the consultations that have taken place on system transformation.

These across the province and on-line consultations were extensive and thought-provoking. They strongly supported a case for change insofar as the needs of families are not being addressed; there is significant under-funding, and evidence of unfairness and inequity. There was broad based support for the transformation of the system.

Major points from the consultations included:

- Transportation is a significant barrier to community participation. Other physical, economic and cultural barriers remain.
- A choice in respite services is needed for caregivers.
- There is a lack of residential service options. Partnerships and collaboration, including those with other Ministries, are needed.
- Recognition of the lack of transition planning into adulthood.
- Co-ordination for individuals with specialized needs is needed across Ministries.



*The Honourable Madeleine Meilleur
 Minister of Community and Social Services*

OASIS supported many of the themes raised during the consultations and the principles of transformation of services in general. However, OASIS has highlighted to the Minister the need for a healthy Agency system that can offer families choice in how they are supported. Innovation and creativity at the Agency level also needs to be supported.

OASIS has also highlighted the need for additional system funding that is flexible; a system that supports good financial management.

OASIS is pleased to have been part of system transformation and will continue to be involved in future discussions.

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Upcoming OASIS
Board meetings

March 14-15
Oshawa (TBC)

May 9
Muskoka,
Cleveland House,
Minett

*If you would like
to have a
representative
attend an
upcoming
meeting, please
contact Andy
Rotsma at
905 844 0146,
ext. 270.*

Executive
Meetings

Feb.15
April 19

*All meetings held
at Community
Living Oakville*

2007 OASIS
Conference and
Annual General
Meeting
May 9,10,11
Muskoka
Cleveland House
Minett

Watch your mail
for conference
information !

Message from the President

There is so much to report that I shall confine my remarks to brief comments on the various activities:

Board meetings: So far this year we have held Board meetings in Windsor, Barrie, Guelph and Burlington. At each we heard presentations on the activities and plans of the agencies. It has been a learning experience and we have been impressed by the quality of supports and services and the innovative ideas described.

Labour Seminars: Two have been held so far this year and both were sold out. Comments received were highly favourable. Congratulations to Dave Ferguson, Andy Rotsma, Don Seymour and Judy Pryde for organizing them so well.

Communications: Sherry Kerr and her committee continue to work on improving our communications.

Membership: Our membership now stands at 122, the latest being The Region of Halton. The more members we have the more we are listened to by the Government.

Meetings with Government: We have secured a meeting with the Minister and a meeting in Windsor for a pre-budget presentation. Members will receive a copy of our submission. We have joined with other members of the Provincial Network to finance a report by consultants to be presented to the Government as a whole. Our latest MPP bulletin has been distributed to members of the Legislature, of which you have received a copy, and we have had meetings with the staff of MCSS, WSIB and MPAC on issues affecting our members, as you have been informed.

Salary Survey: Now that the last \$11 million has been allocated by MCSS, Freshwater Business Consultants will be conducting a salary survey.

I urge you to participate; the larger the number of participants the more meaningful it is to you.

Fanshawe: Following our productive meeting in the fall we are aiming for another meeting in the new year to discuss ways of working together to promote our sector to high school students. Our intent is that once we have developed a program with Fanshawe we shall approach other Community Colleges.

Website: If you haven't visited our website lately, you should. Gordon Anton has made some changes that have been very positive. There are more to come.

Business Resource Committee: This committee has completed a "best practices" manual on financial management. The manual is on CD format and it will also be on the website in the members only section. Their next project is legal documents pertaining to individualized funding.

Annual Meetings: Ann Kenney has everything organized for the 2007 annual meeting in Muskoka May 9th and it looks great. Judy and Andrew have already started work on the 2008 annual meeting in Niagara.



Gerald Sutton
President, OASIS

HAPPY NEW YEAR TO ALL.

Gerald Sutton,
OASIS President

Sutton Honoured for Service To Community

OASIS President Gerald Sutton was recently honoured with the Ontario Senior Achievement Award considered Ontario's highest award for community contribution as a senior. The award is given to those who are a role model for others.

In nominating Gerry for the 2006 Senior Achievement Award, Andy Rotsma, ED Oakville Community Living notes that "as a senior, (over 80 years old and still going strong), Gerry continues to give so much not only to his community, but now to the agencies across the province as President of OASIS. As a volunteer, Gerry represents over one hundred agencies who support people with a developmental disability. His duties have him meeting with different levels of governments, other service agencies, families and the media." Gerry continues to redefine what it means to be a senior.

Past recipients
of the OASIS
Annie Oliver
Award

Gordon Anton
(2004)

Helen Havlik
(2005)

David Ferguson
(2006)

2006 - 07 OASIS Board of Directors

President – Gerald Sutton
Past President – George Braithwaite
Vice President Volunteer – Brian Young
Vice President ED – Sherry Kerr
Treasurer – John Bedell
Secretary – Ann Kenney
Director at Large – Judy Reid
Director – Brian Dunne
Director – Michael Humes
Director – Denis McClelland
Director – Bonnie Dinning
Director – Jane Joris
Director – Molly Croke
Director – Doug Anderson

2007 Annie Oliver Award

As many of you know, Annie Oliver was the first president of OASIS and helped create OASIS through a shared vision. The **Annie Oliver Award** is named in honour of our first President and is designed to honour an individual or organization that demonstrates excellence, innovation and leadership in the developmental services sector; an example to others through outstanding administrative processes; and through perseverance, determination and positive attitude, has assisted OASIS.

A call for nominations for the Annie Oliver Award has been circulated to all members. Please consider a person or agency that exemplifies the criteria and be prepared to submit their name prior to March 2, 2007.

Board Nominations

There are few ways more important to the developmental services sector than to give of one's time and leadership. Consider becoming an OASIS Board member so that you can provide leadership at this very important time in the delivery of developmental services. A call for nominations for volunteers and executive director members of the Board of Directors has been circulated to all members.

Interested? You will need to seek written consent of your agency Board and submit your nomination to George Braithwaite, by midnight April 13th, 2007.

Send your
Board
Nomination to:

OASIS
Nominations
Chair, George
Braithwaite
c/o The Ottawa-
Carleton
Association for
People with
Developmental
Disabilities,
200-250 City
Centre Avenue,
Suite 200
Ottawa, Ontario
K1R 6K7

Community Living Guelph Wellington A New Phase

Community Living Guelph Wellington advocates for, promotes, and facilitates the full participation, inclusion and empowerment of people who have an intellectual disability.

OASIS extends its appreciation to Community Living Guelph Wellington for hosting the November 2006 OASIS Board meeting.

OASIS extends its thanks to Executive Director Bob Butella and his staff for providing an overview of CLGW.

In the early 1950's a group of parents of twenty children who had special needs came together for **SUPPORT**. They were **INSPIRED** to form an Association that would provide services and **ENRICH** their childrens' lives.

With an annualized budget of \$10.6 million, Community Living Guelph Wellington (CLGW) currently provides a full range of accommodation, employment and day program services and supports to more than seven hundred adult participants living in the City of Guelph and throughout Wellington County. Program sites are located in both urban and rural areas across the +1,000 square mile County.

CLGW currently operates twenty four group homes; seven day program sites – including ARC Industries and a Senior's Day program. More than two hundred people receive supports through SIL and Supported Employment across the area. CLGW has approximately 400 employees.

To mark their 50th Anniversary in 2005, CLGW launched the \$2.5 million **ARC Industries Capital Campaign** to raise funds to improve the facilities on the ARC property. The local Community has been solidly behind the **Campaign**, pledging \$2.2 million to date.

With this support by the community our three phase construction and renovation project is now underway.

The first phase is construction of a new lifeskills/admin building. This phase is now complete and programming began from the new Lifeskills building on January 8, 2007.

The second phase will be the construction of a fully wheelchair accessible gymnasium/auditorium addition to the ARC Industries building. Construction on this phase is slated to begin in March 2007. The final phase is a complete overhaul and renovation of the ARC Industries building.

The Board of Directors of **Community Living Guelph Wellington** has developed the following *Services Principles* to guide and provide focus to the work of our agency.

Service Principles

- Promote public understanding, acceptance and inclusion of persons with an intellectual disability into community life
- Provide an equality of opportunity for all persons and their families to access services and supports within their home community
- Providing supports as determined and requested by people and their families
- Empowering consumers by involving them in responsible and informed decision making
- Ensuring quality of service through regular reviews of procedures, policies and through fiscal responsibility
- Ensuring a range of quality services through cooperative planning throughout the county.

The accomplishments of CLGW are many. With this new phase in their history already extremely successful, the opportunities are endless for CLGW.

Constructing a Risk Management Strategy & Plan

Risk management incorporates policies, programs, measures and competencies for identifying, assessing and managing risk. Together with your Board, identify risks, level of risk tolerance and finally, develop a policy and plan for risk management.

Adapted from an article by Paulette Vinette at www.charityvillage.com

Technology and Intellectual Property Risks

By Paulette Vinette, CAE

Your organization's information and its storage places are extremely valuable assets that are susceptible to risk. It is critical that your computers are routinely backed up and that you have written procedures for everyone involved to follow (even for volunteers if they store information that belongs to your organization). You should also document lock up procedures for all of your equipment and files.

High performance organizations produce an "Asset Protection Plan" - a detailed catalogue of all of the organization's valuable assets in complete detail. The catalogue should be as comprehensive as possible, so that it is useful for an insurance claim or filing an incident report.

Computer Crashes & Viruses: Follow back up procedures to archive data and monitor compliance; install virus protection software; circulate a computer use policy; use password protection; replace aging computer hardware and software before their terminal fate.

Information Protection: Critical hard-copy documents should be stored off-site in a fire-proof safe. Restrict access to file drawer keys.

Critical electronically-stored information requires additional risk management. Files should be copied and stored on a disc offsite. Lastly, develop a risk management plan and reduce your liability.

Risk-Based Audit

Some changes are taking place to the auditing methods for agencies within the developmental sector.

The new risk-based audit has added an additional focus on understanding the business and fraud risks within an agency. Auditors will be required to deal with more individuals and gain an increased understanding of the policies, controls and management's overall decision-making process. In addition to the regular audit book information that agencies should provide, they will require information with respect to controls and policies of the organization.

The auditor's focus will include discussions with respect to procedures to assess risk and processes in place for monitoring and responding to risks, including fraud and error in the financial statements. Unusual transactions, complex transactions and the ability to override controls will be investigated.

In addition to the information that you regularly include in your audit book, documentation of the policies and procedures of the organization would be beneficial. If you prepare a detailed flow of information throughout the organization, including the design and implementation of controls, this will help mitigate some of the increases in costs that will accompany the new risk-based auditing procedures. The main areas of control that should be documented include values and culture of the organization, IT level (include access, security, back up and storage of data), financial statement and budget preparation, revenue and receivables, purchases and payables, and payroll.

Trust in Charities Remains High

80% of Canadians feel that they are familiar with charities

66% feel that there should be an independent non-governmental organization or agency monitoring the activities of charities

63% of Canadians think that the opinions that charities express on issues of public concern do have value

Adapted from the Executive Summary, developed by Ipsos Reid for the Muttart Foundation, "Talking About Canadians 2006".

The Muttart Foundation's report "Talking About Charities 2006" raises interesting issues about charities and the level of trust Canadians have in local charities. Recent media concerning MADD Canada brings this issue to the forefront. Each Canadian charity now must grapple with issues related to the level of trust held by supporters, and donors.

Overall, the level of trust that Canadians have in charities has held constant in the past several years, with a strong majority of Canadians trusting charities, at least somewhat. Not only do Canadians trust charities, but they also trust the leaders of charities. In fact, only nurses and doctors are trusted more.

One of the key areas impacted by trust is fundraising. Although the proportion of Canadians who feel that charities do not have sufficient funds to meet their objectives has declined slightly since 2004, a majority of Canadians still hold this view.

One of the more controversial fundraising methods used by some charities is the hiring of commission-based professionals who fundraise on their behalf. A strong majority of Canadians find it unacceptable for charities to use this method and feel that more attention should be paid to the amount of money spent on hiring professionals to do their fundraising.

Although most Canadians (79%) feel that charities are generally honest about the way they use donations, almost three-quarters of Canadians (73%) believe there are too many charities trying to get donations for the same cause.

Overall most Canadians (60%) recognize the costs involved in running a charitable organization and feel it is appropriate to have some of the funds raised go towards the charities' operating expenses. Virtually all Canadians think charities should be required to disclose how donors' contributions are spent.

Most Canadians support charities earning money through business activities, as long as the money goes to the charity's cause.

Canadians continue to feel it is important for charities to provide them with information about their activities. Almost all Canadians think it is important for charities to provide them with information on how they use donations, their fundraising costs, the programs and service they offer and the impact of their work on Canadians; however, no more than half of Canadians feel that charities actually do a good job in providing these kinds of information.

When considering making a donation to a particular charity, Canadians are most likely to research that charity through its website (58%), followed by a website of someone who regulates charities (50%), calling the charity and asking for more information (45%), and looking at the charity's financial statements (44%).

Fascinating information. Challenging? Consider the suggestions made concerning providing information about donations, fundraising costs and particularly, the impact of your services and supports on the individuals you support.

Community Living Burlington Transitional Day Program

OASIS extends its thanks to Community Living Burlington for hosting the January 2007 OASIS Board meeting.

The Transitional Day program outlined in this article, by Community Living Burlington, is just one of the innovative and creative services offered by Community Living Burlington.

You will note that this day program is offered to individuals from across Halton Region thus demonstrating a collaborative approach to service provision.

Community Living Burlington has received funding from the Ministry of Community & Social Services which allowed them to create an alternative day program for individuals residing in the Halton Region.

The Transitional Day Program is open to residents of the Halton Region between the ages of 21-28, who have a developmental disability. The program runs Monday to Friday and is open from 8:00am - 4:00pm. The program is based out of the Salvation Army building in Burlington. Cost for participants is \$10.00 per day. Transportation to the program is not provided.

The Day Program gears support to the individuals attempting to develop daily living and social skills as well as participating in a wide variety of recreation and leisure activities within the community. Activities include; cooking, life skills, computer skills, literacy, volunteer work (the food bank where we volunteer monthly has invited us for a Christmas lunch in December to say thank you for our support and assistance), visits to the YMCA and other recreational activities.

Below are excerpts from the Transitional Day Program newsletters.

"The YMCA workouts are an important part of our program as physical fitness is an important aspect of a healthy life. We watch with pride as our groups exercise. "Regulars" say hello and we've been approached by several curious "Y" members with positive comments on the decorum of our groups. We have integrated into the water aerobics classes with ease."

"A lot of work placements in the community involve cleaning skills and part of our program focuses on teaching those skills in manageable chunks. We've seldom seen such a cheerful group of domestic engineers! Go ahead, ask for help at home, little by little you may be surprised to see that chores are being completed, done well and willingly. "

"We have also built a soothing, relaxation element into the program. We have a guided visualization tape that we use to slow things down and everyone can benefit from learning to de-stress. On the more serious side, we have spent the month reviewing street safety videos and having lengthy discussions about being safe in the community. "

"Our goal here is to have fun, provide a friendly social atmosphere and foster peer relationships but, we are also preparing for the future. We believe that everyone has a right and responsibility to do meaningful work. This program is a platform for stepping up to enhance our existing skills and acquiring new skills. As a team, we tried to figure out a way to teach money skills, work readiness, job training skills and business elements in a fun and understandable way. We thought, "Why not launch a new business?" We were able to assist the individuals to navigate the internet and research something that would require a small amount of capital and would provide a practical opportunity to teach all these skills."

Hats off to Community Living Burlington for its leadership and innovation.

Check Us Out

OASIS website
www.oasionline.ca
OASIS email
oasis@oasionline.ca

OASIS mission:

To facilitate the sharing of ideas, resources, systems and information, OASIS will liaise with government on behalf of member organizations with the goal of improving the development of cost effective quality supports for individuals with developmental disabilities.

FOCUS is published quarterly by Ontario Agencies Supporting Individuals with Special Needs

Ideas and articles are welcomed for FOCUS. Contact the Editorial Committee.

Look for the next issue of FOCUS in the spring of 2007.

CRA on Valuation Date for Bequests

By Kate Campbell, Miller Thomson

Bequests of property made by a Will are often received by a charity long after the Testator dies as it takes time to administer an estate. The value of a gift in kind, such as shares, can vary during this time period. The issue arises as to whether a charity should value the gift at the date of the bequests or when the gift is actually received. The valuation impacts the charitable receipt and the cost amount of the property on the charity's books. Fortunately, this valuation issue should not impact the charity's disbursement quota.



Kate Campbell
Miller Thomson

The Income Tax Act deems a gift by Will to be made immediately before a person dies. This provision allows the charitable donation tax credit to be claimed in the deceased person's final T1 tax return. The Canada Revenue Agency confirmed in Registered Charities Newsletter No. 27 that this provision requires the recipient charity to issue a receipt for the fair market value of the gift **at the time immediately before death**. This is so, even though the property is not received by the charity until many months (or even years) after the date of death.

This article was first published by Miller Thomson, LLP's Charities & Not-for-Profit Newsletter, December 2006.

Mandatory Retirement

This is a synopsis of an article from the Fall 2005 OASIS Focus, "Mandatory Retirement: The End is Near". Refer to the original article for full details.

Mandatory retirement policies are no longer lawful in most Ontario workplaces.

In summary, here are some items to be aware of:

- Employers will have to justify a decision to terminate an employee age 65 or older based on the same criteria that would apply to younger employees.
- Employers will need to ensure that they have appropriate policies and procedures in place to deal with accommodation issues affecting older workers.
- Employers should review the provisions of pension plans which are related to age 65 to determine the impact of the proposed changes.
- The impact of the changes on insured benefit plans, including long term disability plans (which typically cease benefit payments at age 65), life insurance and prescription drug benefits should also be reviewed.
- Employers should be aware that employees who are injured after age 63 will continue to be eligible to receive WSIB Loss of Earnings benefits for a two-year period only, while employees who are injured before age 63 will continue to be eligible for Loss of Earnings benefits until age 65 only.