

Alzheimer Society

Y O R K R E G I O N



2013 |
2014 |

Annual Report

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Mission Statement

The Alzheimer Society of York Region’s mission is to alleviate the personal and social consequences of Alzheimer’s disease and other dementias and promote research.

Vision

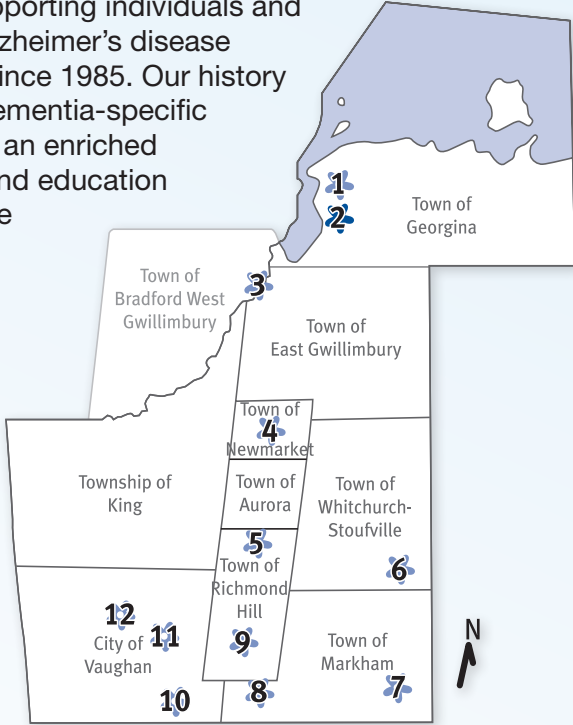
We are committed to the care of families and the cure of Alzheimer’s disease and other dementias.

We will achieve excellence, innovation and leadership in **Family-centered services, Advocacy, Education and Fundraising** through caring professional staff, active volunteers, valued partnerships and a supportive community.

Alzheimer Society of York Region (AS York)

The Alzheimer Society of York Region has been a leader in actively supporting individuals and families coping with Alzheimer’s disease and other dementias since 1985. Our history of delivering quality, dementia-specific day program services, an enriched social work program and education opportunities within the Region of York is well respected.

We have a proven record of working collaboratively and in partnership with different agencies within the Region of York to serve the needs of families and individuals living with Alzheimer’s disease and other dementias.



York Region

Help for Today...Hope for Tomorrow®

Client Satisfaction for AS York

The continued efforts of our staff and the value of our programs were once again evident this year through the results of our 2013 client satisfaction surveys. This year's family survey process was administered in five parts to draw feedback from clients in all facets of our programming. The five parts measured client satisfaction in the following programming areas: D.A.Y. Programs, Social Work, Caregiver Support Groups, Caregiver Education Series and an exit survey from our D.A.Y. Program. Our average rate of return was 61%. Some of the highlights are as follows:

D.A.Y. Programming – Contributing to the Quality of Life

For the Caregiver

When asked if a family member's participation in an AS York day program improved the quality of life of the caregiver, the following responses were received:

75%

stated that their stress level was reduced

69%

stated they had more time to do household chores

51%

stated they had more time to rest

For the Participant

80% of the caregivers responded (from the 2012 survey) that they were able to delay admission into Long Term Care due to the family member's participation in one of our D.A.Y. Programs.



Overall Results

Families consistently rated all the services offered by the Alzheimer Society of York Region in an extremely favourable manner. Moreover, families overwhelmingly stated that they would recommend AS York programs to others.

99%

Rated D.A.Y. Programs as Excellent/Good

98%

Rated the Support Groups as Excellent/Good

95%

Rated the Social Worker / Caregiver Support Group as Excellent/Good

100%

Rated the Education Series as Excellent/Good

Awards

- Recipient of the 2013 “Not-for-Profit of the Year” Award from the Newmarket Chamber of Commerce.
- Recipient of the “Community Partnership Award” from Circle of Care, one of GTA's leading providers of home health care and community support services.

Who We Are

Board of Directors

Executive

President

Farhad Sethna
Vice-President, Corporate Services
Sheppard Village LTC
Chair, Governance Committee

Vice President

Zahid Salman
Executive Vice President
Morneau Shepell

Treasurer

Shawn D. Turner
Chief Executive Officer
Envirocorp Services Inc.
Chair, Finance Committee

Secretary

W.S. (Bill) Wylie
Manager, Commercial CDM Programs
Horizon, Utilities Corporation

Members at Large

Craig Bates
Human Resources Consultant

J. David McLennan
Barrister & Solicitor, Partner
Hill Hunter Losell Law Firm LLP
Chair, Facilities Committee

Janet Iwaszczenko
Executive Director
Bloomington Cove LTC

Maimu Schaer
Retired

Dr. Catherine Meunier
Medical Director
Community and Health Services Dept.
Housing and Long Term Care Branch,
The Regional Municipality of York

Tiffany Goodlet
Vice-President, Business Development
Knightsbridge Human Capital Solutions

Staff

Chief Executive Officer

Loren Freid

Program, Client Services & Education

Senior Manager of Programs and Client Services

Andrea Ubell

D.A.Y. Centre Personnel Program Managers

Franca Contardo
Darlene Matte
Mary Moore

Senior Program Workers

Laura Letassey
Kala Matheendran

Program Workers

Tiziana Cassano
Alice Cheung
Jaime Cruz
Moe Del Fabro
Jennifer Golding
Ron Gorlick
Lisa Ilesse
Daria Padilla
Catherine Timm
May Yuen
Dora Zdanko

Assistant Program Workers

Elsie Kwan
Clare Walton

Van Drivers

Alvin Gardner
Patrick Kwan

First Link Coordinator

Trevor O'Connor

Public Education Coordinator

Jon Macri

Senior Social Worker

Tara Arthurs

Social Workers

Elaine Cheung
Polly Choi
Diana Evangelista
Linda Hayward (retired)
Ellen Houser
Angela Johnston
Hemal Joshi
Krystal Kellington
Simone Ma
Alyssa Moore
Adriano Murarotto
Laura Quilliam
Emma Rezaei
Isabella Velikovsky

Philanthropy and Communications

Director of Philanthropy

Lorie Avery

Development Coordinator

Jacqueline Locke

Events Coordinator

Elaine Ross

Communications Coordinator

Anne Carriere

Finance and Support Services

Manager of Finance and Support Services

Janice Clarke

Administrative Assistants

Wendy Creasey
Jan Frampton
Susan Talbot

Finance Coordinator

Allanna Yates

Volunteer Coordinator / Administrative & Public Engagement Assistant

Cathy Loitsch

Message from the Board President and the CEO



Farhad Sethna
Board President



Loren Freid
CEO

2013-2014 was a transformative year for the Alzheimer Society of York Region (AS York).

We implemented a new strategic plan that repositioned AS York from being a provider of quality services to that of a recognized and essential system resource for addressing dementia in York Region. Supporting this strategy is a new direction in philanthropy to build our capacity for services at the community level, right across York Region. Finally, a move of our head office and main service hub was initiated, signaling the embarkation of the bold new direction for the future of AS York.

With valuable input from key stakeholders, our new strategic plan for 2013 – 2016, “How Can We Help You” builds on our successes. We want AS York to be used as an effective resource for meeting system needs regarding dementia. AS York’s role will be as a central resource to develop and expand dementia services across the Region and along the continuum. Moreover we will utilize research that informs our work and measures the effectiveness of our programs as we expand services.

Underpinning these strategic directions is a commitment by AS York to build the capacity necessary to achieve the objectives of our strategic plan. The basis of this commitment is a new philanthropic direction. The focus of the philanthropy stream moving forward is to create a sophisticated, diversified, sustainable program. This will be accomplished by creating a culture of philanthropy within AS York and focusing the energies and skill set of each team member to increase the revenue of two major signature events, and launching a major gift campaign.

With AS York’s strategic objective to expand services to meet the growing need for dementia services in York Region comes the need for more and better space. We have outgrown the space in our existing Newmarket headquarters and have been diligently exploring opportunities to relocate to more suitable premises. We are delighted to report that the Alzheimer Society of York Region will relocate our head office and Newmarket D.A.Y. program to a new facility, the Cartwright Centre, on Edward Street in Aurora, just off Yonge Street and south of Wellington by the summer of 2014.

Our new space will enable us to upgrade, expand and diversify our programming, providing a superior environment for both client care and staff efficiency. It will be a sustainably designed, inviting facility able to provide comprehensive, innovative programs and

person-centered care. The improvements are going to be substantial, with day program space two and a half times larger than our current Newmarket facility, giving us the opportunity to serve more program participants and providing greater diversity in day programming as well as in caregiver support and education facilities.

Our neighbours in the building include CHATS (Community & Home Assistance to Seniors) and YSSN (York Support Services Network), both of which are compatible and like-minded community service organizations. The proximity of our three organizations – together forming a community healthcare campus of care - offers greater convenience to our respective clients. In all its facets, the new Aurora facility underscores AS York’s objective to be an essential resource for all stakeholders.

These transformative developments are integrated and geared to defining AS York as a vital resource and partner in developing programs that address the rising tide of dementia within our service area, which we know will increase at a rate alarmingly higher than the national average. And we gained traction in the past year in each of these initiatives.

In delivering services, particularly through our First Link and Finding Your Way programs, we surpassed many of the previous year’s targeted volumes and client numbers. For instance, the number of family cases serviced by our caregiver support team increased by more than 13% (283 new families) over last year, and the number of counselling hours correspondingly increased by

11% (955 more hours) over the previous year. This ensures that the increase in volumes was not offset by a reduction of precious service time to individual families.

Our effectiveness as a leader in meeting healthcare system needs through a dementia framework was improved through two significant developments. The first is Health Links, which was established by the Ministry of Health and Long Term Care to provide coordinated, integrated, high quality care to the segment of the population that uses a disproportionate amount of hospital resources at a high cost. AS York is proud to be represented on the steering committee of the three burgeoning local Health Links, to provide a dementia perspective to coordinated, integrated local health care planning. The second development is the Central LHIN training initiatives, led by AS York. These training modules help other healthcare providers instruct caregivers how to manage COPD, CHF, and Alzheimer’s disease. Other modules help health care workers better recognize suicidal tendencies, and help caregivers’ self-manage Alzheimer’s.

Finally, it has been a transformative year, when new strategies and initiatives were put in place which will help take AS York to a new level in services, research and guidance for all who live with Alzheimer’s and other dementias in York Region. None of it would have been possible without the efforts, creativity and contributions of our staff, partners, clients, volunteers and donors. You have our heartfelt thanks as we look optimistically to the future.

Farhad Sethna
Board President

Loren Freid
CEO

How We Helped

Caregiver Support

2,121

**families helped
this year**

through over 8,600
hours of counselling

“I would like to extend my personal thanks for the support you have given me through this process... for being such a good listener when I needed someone to talk to.”

- Dorothy Moffatt (Caregiver) describing Polly Choi, MSW RSW and member of AS York social work team.

D.A.Y. Programs

239

participants

attended AS York’s three day programs in Thornhill (Markham), Newmarket and Stouffville, with youngest attendee at 33 years old and oldest attendee at 95 years old

“Our family is very appreciative of everything the Alzheimer Society of York Region did for Donald, he made so many friends, and he loved so many of you; your place became his second home and he looked forward to going (to the D.A.Y. program) five days a week.

We can never thank you enough for being so loving and warm, you are all so kind. Donald was blessed being surrounded with your beautiful family who all work at the Alzheimer Society. Forever grateful.”

- The Maclean and Norton Family

The D.A.Y. Program Student Internship Program

3,451

**hours provided
to students**

who participated in AS York
D.A.Y. program placements

“I would like to thank you for giving me the opportunity to do my placement here. I really enjoyed the experience and have learned many new skills and qualities about myself which will help me to pursue my career in this field. I appreciate all your help and guidance and cannot thank you enough, you are a wonderful team and I could not be happier with my choice of placement.”

- A Student Placement



Social Worker Tara Arthurs and First Link Coordinator Trevor O'Connor participate in the Annual Health Fair on Georgina Island

Information/ Education Sessions

11,844

participants

in 289 speaking/education sessions, offered in Cantonese, Italian, Hindi, Gujarati and English.

Support Groups

671

participants

in 79 support group sessions

“The support group is amazing, supportive and knowledgeable about our situation individually and is very positive; I feel very comfortable and the social worker is always available by phone or email”

- A regular support group participant

Service Integration

28,000

day program spaces

filled with support by AS York social work team across seven dementia programs in York Region administered by our health service partners; the AS York social work team leads support groups and provides service navigation and caregiver support for families; and training for new day program staff.

“Mackenzie Health is thrilled with the long standing and innovative partnership that has been developed with the Alzheimer Society of York Region which provides Outreach Services to our Adult Day Program clients and families who are dealing with Dementia, as well as providing ongoing education to Mackenzie Health staff. Through this specialized collaboration we can assist individuals and their families to enjoy a better quality of life in a more timely and financially efficient manner.”

- Richard Tam, Executive Vice President Operations and COO, Mackenzie Richmond Hill Hospital



Health Care System Leadership

21

provincial networks, committees and work groups

participated in, by AS York, to bring forward the needs of persons living with dementia and their care partners.

“Behavioural Supports Ontario was launched in 2012 as a provincial initiative to enhance health care services and improve the quality of care for older adults with complex health needs and responsive behaviours. It is the collaborative work of active partners such as the Alzheimer Society of York Region, who have contributed their knowledge, expertise and many volunteer hours to the design and implementation of services and supports that has allowed hundreds of individuals to successfully remain safely in their own home. I would like to publicly thank AS York for their ongoing commitment to advocating for the best possible care for individuals and their caregivers.”

- Patti Reed, Program Manager, Behavioural Supports Ontario

Treasurer's Report



Shawn D. Turner
Treasurer

Overview

The Society's audit firm, Hogg, Shain & Scheck Chartered Accountants, reports the audit results to the organization's Finance Committee annually. The 2014 audit results were reviewed, and the auditor's report contained no items of concern or substantive qualification. The Committee was very pleased with the report and with the Society's fiscal performance and continued solid financial

management. A strong financial foundation ensures we have the capacity to maintain and deliver our existing services and supports our new growth plans and leadership initiatives. As always, the financial focus was on the prudent and effective use of the resources entrusted to us by our clients, donors, government and funding partners.

Program growth in the 2013-2014 fiscal year was supported by additional funding from the Central Local Health Integration Network (CLHIN) and Fund Development activities.

The Alzheimer Society of York Region (AS York) ended the year with a surplus of \$16,479 as compared to \$10,957 the previous year. Both revenue and expenses increased by approximately 4% to \$2,712,406 and \$2,643,401 respectively.

From a Governance perspective, the Finance committee meets before each Board meeting to review the monthly statements and to discuss any financial issues that have arisen during the month. During the last year, the Finance Committee also assumed interim oversight and responsibility for Quality and Performance Management.

Activities undertaken by the Finance Committee included the development of; a Multi-Year Capital Asset Replacement Plan, a comprehensive Disaster/Emergency Plan, a Contingency Plan for Reduction of Funding and an Investment Strategy of Surplus Funds from Fundraising. We also revised and oversaw substantive revisions to the Quality and Performance Report and established compliance standards for all criteria and performance dimensions. These changes provide the Board with greater clarity and insight into the performance dimensions and enable the Board to more effectively monitor quality and risk outcomes.

Revenue

The largest increase in revenue was attributable to new funding of \$74,199 which we received from the CLHIN which constituted \$44,227 in one-time funding and \$29,972 in base funding increases. We also received \$40,000 in new revenue from the Alzheimer Society of Ontario for the Finding Your Way Program.

The Board has determined that increasing revenue generated from donations, grants and events, is critical to the future growth and sustainability of

the organization. To that end, in 2013/14 overall results from other revenue generation activities increased by 7% to \$572,862 as compared to \$534,062 in 2012/13.

Expenditures

Salaries and benefits represent over 70% of operating expenses and increased by \$60,000 mainly due to additional staff costs related to the programming associated with the funding received from the ASO. Additionally, one-time expenditures related to CLHIN funding for training and Day Centre improvements in Thornhill resulted in increased expenses, as well.

Balance Sheet

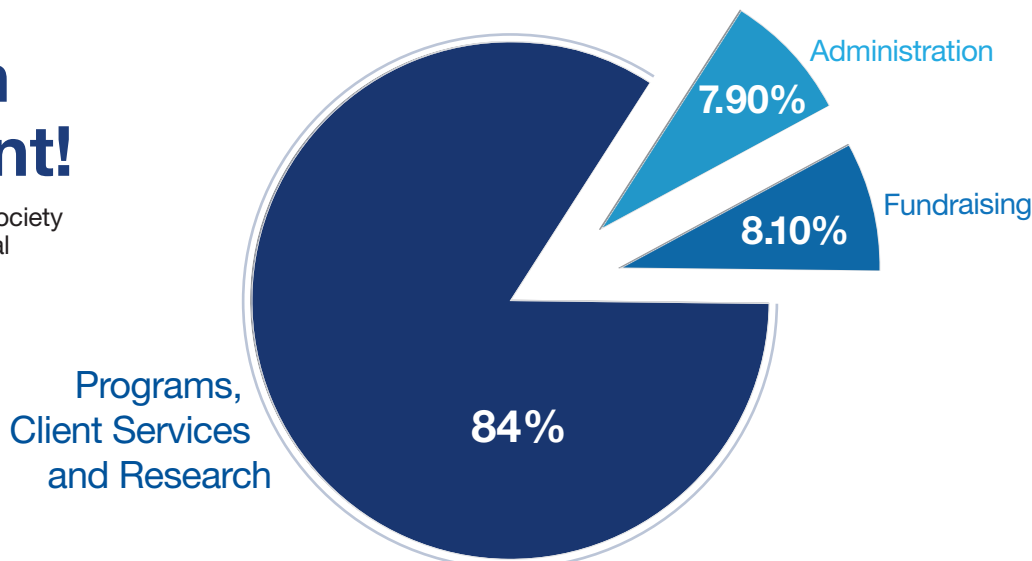
AS York is in a strong financial position with cash and short-term investments of \$706,629. Of this total, \$543,608 is reserved for future projects, expenses and capital expenditures. This healthy position will support the capital costs associated with moving and opening our new Day Centre and Offices in Aurora and will enable us to complete the required renovations and construction without going into debt.

Shawn D. Turner
Treasurer

Great Return on Investment!

Financial support to the Alzheimer Society of York Region results in a substantial return on investment.

As the diagram illustrates, 84% of our expenditures are allocated to programs and services.*



* excluding amortization

Financial Report

The statement of operations and financial position presented here have been extracted from our organization's audited financial statements, approved by the membership at our General Meeting on June 19, 2014.

Our auditors are Hogg, Shain & Scheck Professional Corporation in Toronto, Ontario. The Alzheimer Society of York Region is committed to transparency and accountability to our stakeholders and general public. Our complete audited financial statements are available upon request.

Balance Sheet

Assets	2014	2013
Current		
Cash	54,472	72,260
Short Term Investments	120,285	75,830
Accounts Receivable	121,371	128,746
Prepaid Expenses	38,250	41,385
	<u>334,378</u>	<u>318,221</u>
Restricted Cash and Investments	533,873	452,753
Property & Equipment	142,997	169,451
	<u>1,011,248</u>	<u>940,425</u>
Liabilities		
Current		
Accounts Payable and accrued liabilities	143,728	164,256
Current Portion of Deferred Revenue	67,269	56,193
	<u>210,997</u>	<u>220,449</u>
Long Term Deferred Revenue	384,413	320,617
Fund Balances	415,838	399,359
	<u>1,011,248</u>	<u>940,425</u>

Statement of Revenues and Expenditures

Revenue	2014	2013
Government Support	1,714,206	1,677,123
Donations, Grants and Events	572,862	534,062
Fees	423,675	396,808
Other	1,663	936
	<u>2,712,406</u>	<u>2,608,929</u>
Expenses		
DAY Program	1,183,571	1,137,688
Current Portion of Deferred Revenue	1,038,994	976,565
Fundraising	212,997	267,284
General Operations	207,839	167,235
	<u>2,643,401</u>	<u>2,548,772</u>
Excess (Deficiency) of Revenue over Expenses from Operations	69,005	60,157
Amortization	52,526	49,200
Deficiency of revenue over expenses	<u>16,479</u>	<u>10,957</u>
Fund Balances Beginning of Year	399,359	388,402
Fund Balances End of Year	<u>415,838</u>	<u>399,359</u>

Philanthropy Highlights

Marjorie Logan's Legacy of Love

Since 2010, Marjorie Logan, through her daughters – Carol, Donna and Debbie, has demonstrated heartfelt generosity and compassion by donating a total of \$85,000 worth of stock to the Alzheimer Society. We are deeply grateful to the Logan family. This is their story.

As a family living with Alzheimer's disease for more than thirteen years, we can tell you that one of the hardest and most heartbreaking things has been watching our spirited mother Marjorie change before our eyes.

An independent, devoted wife and mother who worked at CIBC for more than 20 years, Mom was passionate about swimming, canoeing, skating and the great outdoors. She was also passionate about giving back and tirelessly volunteered for the Girl Guides, Canadian Cancer Society, Heart and Stroke Foundation and her church. Mom shouldered the responsibility of caring for her elderly relatives as well--most of whom had Alzheimer's.

We have no recollection of Mom ever being idle... until now. This is where her journey with Alzheimer's has taken her. This cruel disease has stolen a lot from Mom—and from us, her family. But we know without question that she would want to help other families like ours.



Marjorie Logan surrounded by her daughters (L-R) Carol Snider, Debbie Joannou and Donna Guertin

This is why we became proud supporters of the Alzheimer Society of York Region. As the number of people diagnosed with Alzheimer's escalates, we understand the urgent need to fund research for a cure. However, we also understand the equally urgent need to fund support for caregivers.

By giving back in our Mother's honour, we are keeping her legacy of love and caring for others alive.

When words fail, music speaks



Loren Freid; clients Berta Pattenden, Diane Styrmo and Fausto Marrone

Thanks to a generous donation of \$35,000 from the Mayor of Richmond Hill's Charity Golf Tournament in June, the music therapy program has been extended another two years at the D.A.Y. Centres in York Region. Since the inception of the music therapy program in 2011, it has been a huge hit.

We are pleased to have the music therapy program continue.

Thanks to a generous donation of \$35,000 from the Mayor of Richmond Hill's Charity Golf Tournament in June, the music therapy program has been extended another two years at the D.A.Y. Centres in York Region. Since the inception of the music therapy program in 2011, it has been a huge hit.

Two Golf Tournaments raised \$80,000 for AS York



Board Member, Allan Garber with Tom Caldwell of Caldwell Securities Ltd.

An outstanding \$80,000 was raised by two golf tournaments last year, the Building Memories Golf Classic at Pheasant Run Golf Club and Caldwell Securities Ltd/Alzheimer Society of York Region Golf Classic at King's Riding Golf Club respectively. This success was made possible by all the fabulous volunteers, sponsors, prize donors and staff.

Donor Recognition

We are extremely grateful for all the support we receive from our wonderful donors.

Gifts \$25,000+

Caldwell Securities Ltd.
Corporation of the Town of Richmond Hill
Logan, Marjorie
Regional Municipality of York

Gifts \$10,000+

Charles F. Fell Charitable Fund
City of Vaughan
Pheasant Run Golf Club
The Leonard and Gabryela
Osin Foundation

Gifts \$5,000+

Parker Garber & Chesney LLP
Estate of Stella Irene Rook
Howard, Janice
Rotary Club of Woodbridge
Spring, James
Town of Aurora

Gifts \$1,000+

ADL Home Health Care
Board, Adam
CCL Industries Inc.
CI Investments
Fieldgate Development
Fully Completely Inc.
Garber, Allan and Gale
Hauer & Sons Construction Co. Ltd.
Hogg, Shain & Scheck
Professional Corporation
Hydro One Employees'
and Pensioners' Charity Trust Fund
Interior Systems Contractors
Association of Ontario

Gifts \$1,000+ (cont'd)

La Civita, Joseph
Ling, Kitty
M.A.M. Group Inc.
Markville Chevrolet
McLennan, David and Brenda
Morneau Shepell Ltd.
Newmarket Seniors' Meeting Place
Proctor, John
RBC Foundation
Roadhouse & Rose Funeral Home
Rotary Club of Newmarket
Salman, Zahid
Schinagl, Albert
Sethna, Farhad
Sukhraj, Dax
Summa Engineering Limited
TACC Construction Ltd.
Town of Newmarket
Town of Whitchurch-Stouffville
Travel Professionals International
Whitlum, Karyn

Gifts \$500+

A. Christopher Dymond
Professional Corporation
Bhatia, Saroj
Bogdanow, Christina
Brattys LLP
Bryson, Bill
Canco Climatecare
Heating & Air Conditioning
Cardinal Carter
Catholic High School
Cartridge World
Di Poce, John
Dundee Wealth Management

Gifts \$500+ (cont'd)

Edwards, Joan
Glinski-Oomen, Margaret
Griffin, Gena
Grossi, John Anthony
and Janyn Holtze
Gullo, Maija Eliisa
Hunt, Dave
Investors Group Financial
Services Inc.
IPP INC.
K. J. Beamish Construction Co., Ltd.
Kabel, Todd
Kelly, Frank
Li, Yat Nam and Anita Yuet Har Wan
Living Assistance Services
McCormick, Ann
Metcon Sales & Engineering Ltd.
Munro, Scott
North York Knights of Columbus -
Thornhill
Quaglieri, Mary
Qualicare Newmarket
Racco, Vanessa
Roxborough Retirement Residence
Royal Canadian Legion - Newmarket
Scicchitano, John Paul
Shier, Carm
Smith, Wayne R.
Stouffville Toyota
Switzer, Ronald
Township of King
Township of King - Community
Organizations Program
Turner, Shawn
Versaterm Inc.
Zapfe Holdings Inc.

* And others who wish to be anonymous

Funding provided by:

Supporters
like you



How you can help

By supporting the Alzheimer Society of York Region, you enable us to expand our reach and help even more people touched by dementia.

Make a gift

Donate by mail, phone or online

Support the Golf Challenge

**Join our annual
Walk for Memories**

Volunteer

Volunteer to help us with events and much more

Plan your own event

Organize a fundraising event to support the Society

Leave a Legacy

Continue your tradition of giving with a bequest in your will

Give the gift of stocks

Alzheimer *Society* Y O R K R E G I O N

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Thornhill (Markham)

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Whitchurch-Stouffville

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Richmond Hill

905-508-2670

Vaughan

905-850-5680

www.alzheimer-york.com

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