



# LiveWorkPlay.ca

WHERE POSSIBILITIES TAKE FLIGHT

## Annual Report 2018



*Making a buzz for a more welcoming Ottawa community!*

**Presented at the Annual General Meeting  
St. Anthony's Banquet Hall, Ottawa, June 25**

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Cover photo: attendees at the 2018 edition of the annual Make A Buzz Ottawa community recognition celebration enjoying the cocktail hour before dinner.

# LiveWorkPlay\* Guiding Statements

Adopted by Members at the LiveWorkPlay Annual General Meeting 2011

September 23, 2011 • Ottawa, Canada

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- VISION:** A COMMUNITY WHERE EVERYONE BELONGS
- MISSION:** HELPING OUR COMMUNITY WELCOME PEOPLE WITH INTELLECTUAL DISABILITIES TO LIVE, WORK, AND PLAY AS VALUED CITIZENS.
- CORE VALUE:** PEOPLE WITH INTELLECTUAL DISABILITIES ARE VALUABLE CONTRIBUTORS TO THE DIVERSITY OF OUR COMMUNITY AND TO THE HUMAN FAMILY.

## LIVE, WORK, PLAY VALUES

**WITH RESPECT TO:** HOMES, HEALTH CARE, EDUCATION, PERSONAL DIGNITY, AND PERSONAL PRIVACY

PAID WORK AT MINIMUM WAGE OR BETTER, SHORT-TERM UNPAID WORK, AND VOLUNTEER POSITIONS

CULTURAL AND SPIRITUAL LIFE, SPORTS AND RECREATION, POLITICAL LIFE, AND THE FULL RANGE OF HUMAN RELATIONSHIPS

**PEOPLE WITH INTELLECTUAL DISABILITIES HAVE THE RIGHT TO THE REMOVAL OF BARRIERS PREVENTING THEM FROM EXPERIENCING THE COMMUNITY ON AN EQUAL BASIS WITH OTHER CITIZENS.**

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Development of these guiding statements was influenced by many individuals and organizations, including local, national, and international sources. Additional feedback was invited and received from third parties that ranged from grassroots advocacy groups to national social policy organizations. These contributions supported two years of formal and informal discussions facilitated by the board of directors. These consultations included voices from all LiveWorkPlay constituencies, such as individuals with intellectual disabilities, family members, staff, volunteers, and community partners. The statements are intended to resemble the values, intentions, and language of the United Nations Convention of the Rights of Persons with Disabilities, ratified by the Government of Canada in 2010.

## Report from the Board of Directors

The 2017-2018 term was a very productive and energizing one for the LiveWorkPlay Board of Directors. Since the Annual General Meeting (AGM) on September 8, 2017, we moved forward with our work on the newly announced Strategic Directions and carried out our fiduciary duties while finding time for learning and ambassadorship.

We give thanks to our dedicated Executive Staff team, co-leaders Julie Kingstone and Keenan Wellar, who together with the board of directors, have worked hard work to further our vision and mission.

Our Board of Directors report has been restructured to provide our members and the public with information from our two standing committees as well as progress made on the strategic directions announced last year. We are pleased to offer the following updates:

- Learnings from the Annual Board Retreat
- Report from the Governance Committee
- Report from the Stewardship Committee
- Update on Strategic Directions



Chair of the Board  
Cathy Velazquez

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LiveWorkPlay Board of Directors 2017-2018  
Back row: Cathy Velazquez, Christine Felteau, Matt Shipley  
Front row: Daniel Spagnolo, Brigid FitzPatrick, Michelle O'Doherty, Kari Whatley



## **Learnings from the Annual Board Retreat**

On November 18, the Board of Directors and the Executive Staff met for learning opportunities and to plan for the upcoming year. This year's retreat activities included adopting new communications tools, determining next steps for our strategic plan work, and setting the work plan for the board term.

The board was introduced to an online collaboration hub, Slack.com, which has been adopted as a means for staying in touch between meetings. Our Slack digital workspace integrates with our online file storage, videoconferencing, and other tools that we use to plan meetings and enable remote participation.

These tools began paying immediate dividends with less time spent on group emails and helped us to continue our work without significant challenges when our office building was flooded at the end of October. The Slack platform has allowed us to share information in a more timely and organized fashion, as well as giving us more flexibility to accommodate the demands of regular board and committee meetings with our professional and personal lives. This means more time devoted to great outcomes for LiveWorkPlay.

A key goal for the retreat was to develop the next steps for the strategic plan work we started during the prior board term. We prioritized and planned the work to further develop the five strategic directions during our scheduled board meetings as follows:

- November/December: sustainable portfolio of supports and services
- January/February: right relationships with members and families
- February/March: build a leaderful organization investing in quality people and training
- March/April: promote a welcoming community reducing barriers
- April/May: Sustainable and mutually beneficial strategic partnerships

To wrap our day of learning, planning and prioritizing, we revisited our vision, mission, and values, and how they related to the strategic directions. We agreed to the fiduciary, strategic and generative commitments and set a detailed board calendar for 2017-2018. We all came away from the retreat more aligned, connected and excited about the year ahead.

## **Stewardship Committee Report**

The Stewardship Committee (SC) comprised of board members Christine Felteau, Daniel Spagnola, and Executive Staff co-leader Julie Kingstone (who also serves as LiveWorkPlay Director of Operations), met monthly throughout the 2017-2018 board term. The mandate of the Committee is to meet applicable federal not-for-profit incorporation and registered charity obligations, and to assist the board in fulfilling its oversight responsibilities with respect to finance, audit, investments, and risk. The 2017-2018 year was very productive, with some key highlights shared below.

The SC's ongoing oversight duties throughout 2017-2018 included:

- review of the annual budget
- review of quarterly comparative financial reports
- comparing budget to actuals and year over year
- receipt of Executive Staff updates on funding proposals
- completion of the Ministry of Community and Social Services (MCSS) Risk Assessment and Transfer Payment Agency Reconciliation (TPAR)
- meeting with the auditor for pre-audit checklist review for the 2017-2018 fiscal year.

In 2017-2018 in keeping with progressing and executing against our strategic priorities as set out at the last Annual General Meeting, the SC focused on investment policy, staff retention, and realizing efficiencies through a change in our fiscal year.

Although the process is managed by the staff team, the Stewardship Committee wishes to note the competency of that team with respect to the annual Quality Assurance Measures (QAM) audit by the Ministry of Community and Social Services. These surprise audits are conducted at least once a year (for all Developmental Services agencies receiving MCSS funds) with about two weeks' notice. Despite our office building being closed due to flooding when the 2017 audit was announced in the fall, thanks to the entire staff team having their reporting up to date and available in digital format, the inspection was completed, and our certificate of compliance was issued without difficulty.

### **Investment Policy and Strategy**

To ensure appropriate investment of surplus funds and reserves to mitigate against potential funding risks, the SC developed an investment policy that formed the basis for discussions with three financial institutions. The board adopted this policy, which will be implemented in 2018-2019 with the Royal Bank of Canada and has as its core a zero risk to capital strategy, utilizing a combination of guaranteed investment certificates and high interest savings.

### **Staff Retention**

The SC in consultation with Executive Staff discussed the importance of developing and maintaining a quality staff team, utilizing a variety of studies and surveys, as well as a historical review of LiveWorkPlay staff compensation. The key issue identified was to ensure that, whenever possible, staff have a clear picture about the intentions of the organization regarding staff compensation, both short-term and long-term.

The SC proposed, and the board adopted, a plan for annual cost of living increases, as well as milestone rewards based on years of service. These are intended for the long-term, but the expenditures are approved annually, which allows for an appropriate response in the event of unexpected changes in financial position or other circumstances that necessitate change.

A new plan specific to the Executive Staff (co-leaders) will be completed in 2018-2019, and the SC has already gathered relevant information to inform this process.

We have enjoyed the participation of members of the Senior Staff Team in some of our governance activities this year and look forward to this continuing in the years to come. Through our participation in LiveWorkPlay events, we also get a chance to see front line staff in action – how they interact with our members, families, volunteers, and partners – and we see the importance and results of a well-supported team.

### **Change of Fiscal Year**

Our auditor Ross Holmes and Julie Kingstone identified to the SC that our existing June 30 financial year end was creating significant additional labour, because it does not align with the March 31 year end of our main funder, the Ontario Ministry of Community and Social Services.

The SC recommended, and the board adopted, a change in fiscal year for LiveWorkPlay that now runs April 1 to March 31. This will effectively eliminate the need for a review engagement by the auditor, which was necessary (in addition to our full end of year audit) to meet MCSS reporting requirements. This means as of next year the extra work and expense of the review engagement will be eliminated.

The Stewardship Committee is excited for the opportunities that lie ahead. We know that our work is important for ensuring that the organization continues to strive for excellence not only in our delivery of services to our members and the community, but also that we are effectively managing risk and planning for a secure future.

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### **Governance Committee Report**

The Governance Committee (GC), comprised of board members Brigid Fitzpatrick, Michelle O’Doherty, Cathy Velazquez, and Executive Staff co-leader Keenan Wellar met monthly throughout the 2017-2018 board term. Key highlights are detailed below.

#### **New Corporate (Voting) Membership Policy**

The Governance Committee (GC) recommended, and the board approved, the implementation of a new membership structure and Annual General Meeting plan to align with the change in to the organization’s fiscal year end and update the composition of our voting membership.

The AGM is now scheduled for the end of June (June 25 in 2018) with a membership structure that now includes supported individuals (people who are in a formal support relationship with the organization), family members (relatives of those in the prior category), community partners, volunteers, and the board of directors. The new structure provides for up to 35 voting members (there will be 28 this year).

A process was developed using an online survey, and the GC recommended, and the board approved, the membership list brought forward by Keenan Wellar, who designed and processed the membership applications in his role as Secretary to the board.

The AGM remains accessible to all members of the LiveWorkPlay community who wish to attend, but the meeting has been shortened to focus on the fundamentals. The staff recognition ceremony associated with the traditional September AGM will continue to be hosted in September at the Welcome Back Family Feast.

### **Updated Executive Staff (Co-Leader) Performance Management**

The GC researched performance management process options (also known as performance appraisals) for the Executive Staff, which included a review of the methodology that the co-leaders and team leaders are utilizing with the rest of the staff team.

The GC recommended, and the board approved, a new process that includes not only an annual review, but also quarterly discussions, which provide opportunities not only for updates, but also for adjusting (for example, in response to unexpected opportunities or difficulties). This process adopts more of a coaching perspective, which is designed not only to ensure reporting on outcomes, but also to foster better communication and teamwork in support of a thriving organization.

### **Emergency Succession Planning**

The GC reviewed and recommended to the board an updated emergency succession plan policy, supporting our *building a leaderful organization* strategic direction. The board approved this new policy, which includes more robust information about which individuals can fill key roles in emergency situations, and identifies the training provided to those individuals so they are aware and prepared should they be needed in this capacity.

### **Board Recruitment**

The GC's recruitment activities identified several well qualified candidates, from which one was selected (Matt Shipley) to join the board early in the new term to fill a vacancy. The Governance Committee has established a shortlist of qualified candidates for future consideration. In addition, a new process to continue identifying potential candidates (even when vacancies are not anticipated) going forward and to engage with the organization is being explored.

### **Board Effectiveness Feedback**

The GC oversees the board effectiveness feedback processes and engages the board in regular discussion about how we're doing and how we can get better (continuous improvement). This includes a self-evaluation conducted after each monthly meeting, discussing results and suggestions quarterly.



In addition, an annual evaluation is conducted by the Chair who consolidates the results for discussion. The annual board survey results show continuing satisfaction year-over-year for the last three years, and this year's feedback has helped inform improved agenda structures.

A new online evaluation tool is being used to gauge board member experience of meetings, including their feedback on the portioning of the discussions between generative, fiduciary and strategic discussion. The recent transition to the SurveyMonkey tool (online surveys) will increase efficiency of the survey process going forward and make it easier to compile and analyze our own evaluation data.

### **Update on Strategic Directions**

Immediately following the 2017 AGM, steps were taken by the board to prioritize work on our strategic directions and our Vision 2020 established with consultant Mike Coxon (see summary, next page). This included significant investment in gaining an understanding of our current service delivery, scope, and scale of all organizational activities. Major themes were reviewed in December, exploring key audiences, tactics/strategies, and messaging.

The board engaged in ongoing discussions leveraging a set of templates and monthly exercises. We are pleased to report on our progress, described below, in the order in which they were addressed.

#### **Strategic Direction: sustainable portfolio of supports and services**






After completion of our review, our two core supports/services are summarized as follows:

- Employment Supports (helping people with intellectual disabilities find and maintain authentic employment (minimum wage or better) with employers in all sectors.
- Life Coach and Community Connecting supports, which helps people in their homes (such as meal planning and financial management) as well as community engagement (clubs, courses, classes, recreation, sports, and more) and relationships (neighbours, friends, families) and various organizational needs (scheduling medical appointments, travel planning, and more).

In addition, LiveWorkPlay hosts Friday Night Meet-Ups and individual matching initiatives, which bring people with intellectual disabilities and other citizens together, through support for small interest-based weekly social gatherings, as well as one-to-one relationships (which may develop into friendships).

Finally, we will continue to invest in community-building through our three Family Feast dinner events, and the Make A Buzz Ottawa inclusive community celebration.

**VISION STATEMENT:** In 2020 LiveWorkPlay will be a sustainable organization both economically and in terms of a “thoughtful legacy” that is well managed and well governed, with the capacity to ensure leadership succession. Individuals will be supported through a person-centered process to thrive as citizens through supports which enable employment for people transitioning from school to adulthood, better jobs and career outcomes, access to affordable homes and independent lives, and access to long term sustainable and reciprocal relationships. Families will have greater piece of mind, barriers to inclusion will be reduced, and communities will be more welcoming, embracing the value and contributions of all citizens of all abilities, including those with intellectual disabilities.

<p><b>NEGOTIATING RIGHT RELATIONSHIPS WITH MEMBERS AND FAMILIES</b></p>		<ol style="list-style-type: none"> <li>1) Understand Supports</li> <li>2) Articulation of Promise</li> <li>3) Communicate Promise</li> <li>4) Method to Evaluate level of Understanding</li> <li>5) Evaluate and Analyze</li> <li>6) Tweak Strategies as Necessary</li> </ol>
<p><b>SUSTAINABLE AND MUTUALLY BENEFICIAL STRATEGIC PARTNERSHIPS</b></p>		<ol style="list-style-type: none"> <li>1) Purpose of Partnerships</li> <li>2) Define Partner</li> <li>3) List existing Partners</li> <li>4) Determine Relevance of Current Partners</li> <li>5) Identify Gaps</li> <li>6) Identify New Partners and Strategy</li> <li>7) Identify Resources to Support the Strategy</li> </ol>
<p><b>SUSTAINABLE PORTFOLIO OF SUPPORTS AND SERVICES</b></p>		<ol style="list-style-type: none"> <li>1) Understand Supports             <ol style="list-style-type: none"> <li>i) how provided</li> <li>ii) costs/funding</li> <li>iii) outcomes</li> <li>iv) sustainability</li> </ol> </li> <li>2) Establish Capacity of Supports</li> <li>3) Establish Scope of Supports</li> </ol>
<p><b>BUILD A LEADERFUL ORGANIZATION INVESTING IN QUALITY PEOPLE AND TRAINING</b></p>		<ol style="list-style-type: none"> <li>1) Understand Supports</li> <li>2) Future Services</li> <li>3) How to Maintain Quality in Context of Understand Costs</li> <li>4) What Outcomes are Most Important and How to Track?</li> <li>5) Strategy to Attract Right People (Staff, Volunteers, Board Members, Supporters)</li> </ol>
<p><b>PROMOTING A WELCOMING COMMUNITY REDUCING BARRIERS</b></p>		<ol style="list-style-type: none"> <li>1) Understand Barriers</li> <li>2) Understanding Supports in Barrier Reduction</li> <li>3) Prioritize Barriers we are Best Suited to Address and Focus</li> <li>4) List and Develop Strategies for Barrier Busting</li> <li>5) Identify Resources to Support the Strategy</li> </ol>

Strategic Direction: right relationships with members and families

This direction is to ensure that the people we support and their family members (where applicable) have an experience of transparency in understanding what the organization offers, how it will be delivered, and how progress will be reviewed.

We have prioritized the communication of our “Just Enough Support” approach, which emphasizes the importance of ensuring that people are neither under-supported or over-supported, as too much or too little support can be damaging and a barrier to growth and quality of life. Underlying this approach is the priority of building social capital (natural relationships in a person’s life). A series of videos are being developed to help explain this approach, and what the process (and results) look like.

Key to this strategy is a focus on the transition of youth from school to work. LiveWorkPlay has established a relationship with four local high schools for supporting summer and/or part-time employment. This is hampered at present by inadequate resources, but a proposal has been submitted to the federal Opportunities Fund with the hope of improving this important service.

We will continue to utilize our website, social media channels, and electronic mailing lists not only for external public audiences, but also to communicate with members and families.

The board also newly established the External Communications Committee with board members Kari Whatley and Matt Shipley, who starting in January 2018 worked with Keenan Wellar as well as other peers from the board when needed, primarily on communications with our constituents about the change to our fiscal year end and changes to our Annual General Meeting and voting membership.

“We have prioritized the communication of our “Just Enough Support” approach, which emphasizes the importance of ensuring that people are neither under-supported or over-supported, as too much or too little support can be damaging and a barrier to growth and quality of life.”

Strategic Direction: build a leaderful organization by investing in quality people and training

We are striving to build talented and sustainable leadership teams at the both the organizational and board levels, support these teams with the appropriate ongoing development, and prepare for planned succession as well as being prepared in the event of an emergency.

Continuation plans have been completed for all staff management positions, with consideration of internal resources as well as the potential need for external support.

Work of the board to date includes an approved staff retention strategy, adoption of a coaching model to support Executive Staff excellence (and in their operational mandate, the Executive Staff implement training plans and coaching for senior staff, employment staff, and life coach/community connectors).

We continue to stay abreast of best practices in building a leaderful organization with partners such as Community Living Ontario, member agencies of the From Presence to Citizenship initiative, the Ottawa Developmental Services Network, Service Coordination, and others.

The board seeks to lead by example and we are continuing to strengthen our own board-building activities, including succession planning, learning culture, and ambassadorship.

#### Strategic Direction: promoting a welcoming community and reducing barriers

This direction is about “being the change we want to see.” We seek to demonstrate the characteristics of a welcoming organization, and this includes our events as described in the “sustainable portfolio” section. The board contributes to, and supports leadership in advocacy efforts, not only to the benefit of our own members, families, and partners, but for all citizens in all communities.

We are moving to expand our community benefit role beyond the limited scope of the Developmental Services system. This means we not only contribute to information sessions, gatherings, and conferences in our traditional spheres of influence, but also seek to learn and provide education in related sectors, such as affordable housing, income security, labour market inclusion, and more.

To date the board has completed a preliminary review of Welcoming Communities research (developed by leaders in supporting immigrants to have success in Canada) and we will be looking at how this research and its practices may help inform our own communications and community interactions around the inclusion of people with intellectual disabilities in all aspects of community life. It is important that we find new connections to inclusion and welcoming that apply to multiple communities, rather than focusing only on policies, practices, and connections that are disability-specific.

#### Strategic Direction: sustainable and mutually beneficial strategic partnerships

Current partnerships were reviewed, as well as assembly of a preliminary list of potential new partners to help us progress towards our Vision 2020.

Our partnerships are best developed with those who share similar values and passion for an inclusion mandate. We will work to identify ambassadors (board and staff) to manage and invest in strategic relationship building. The benefit of partnerships is one of the most difficult of evaluation challenges, but we aim to develop simple metrics to track outcomes and ensure we are efficiently allocating resources to grow our presence in the community and enrich the lives of our members.

I hope that this review of our abbreviated 2017-2018 year has been informative for our members, families, volunteers, partners, and other audiences who take an interest in our work. I want to thank my board colleagues for an exceptional year.

*Cathy Velazquez*  
*Chair, Board of Directors*

## LiveWorkPlay Stories of the Year: June 2017 to June 2018

LiveWorkPlay works hard to share news and stories about our own contribution to helping the community welcome people with intellectual disabilities to live, work, and play as valued citizens, as well as information about issues of importance at the local, provincial, national, and international stage.

We use a combination of social media channels, including Facebook, Twitter, Instagram, and YouTube as well as various distribution methods including our MailChimp e-zines (The LiveWorkPlay News and Family and Supports News) as well as our blogging our stories from our website, LiveWorkPlay.ca.

Determining which story generated the most interest is not easily determined but using an imperfect assemblage of analytics from these various channels, we have assembled a Top Ten. We'll share the rest of the list after the Executive Staff Operations Report, but here's the clear number one for 2017-2018: our Make A Buzz Ottawa 2018 celebration on May 10!

Not only were more than 10,000 reached through posts on our Facebook page, but the photo blog posted May 14 was so popular that it trended on Twitter for the Ottawa area!

<p><b>LiveWorkPlay Make A Buzz Ottawa 2018: Event Photo Journal</b></p> <p>Monday, 14 May, 2018 07:30 Written by Keenan Wellar</p> <p>Since 2015, Make A Buzz Ottawa has been a two-room St. Anthony's Banquet Hall extravaganza. We start with a cocktail hour with appetizers, silent auction, and photo booth, and then make our way into the dining hall for a sit-down meal, recognition ceremonies, and awards to individuals and organizations who promote inclusion in Ottawa and beyond.</p> 	<p>More photos from our dinner and awards at Make A Buzz Ottawa 2018 <a href="https://www.facebook.com/pg/liveworkplayfans/photos/?tab=album&amp;album_id=10155878626982772">https://www.facebook.com/pg/liveworkplayfans/photos/?tab=album&amp;album_id=10155878626982772</a></p> 
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## Executive Staff (Operations) Report

This will be our first year providing this report within the framework of the five Strategic Directions from the Vision 2020 strategic plan announced by the board last year. There may be some information similar to what the Board of Directors has already provided in their summary, but the information below is intended to inform our members and the public about how implementation of the plan is playing out in operational terms.



### Sustainable portfolio of supports and services

As mentioned in the board report, our core supports/services are as follows:

- Employment Supports (helping people with intellectual disabilities find and maintain authentic employment (minimum wage or better) with employers in all sectors).
- Life Coach and Community Connecting supports, which helps people in their homes (such as meal planning and financial management) as well as community engagement (clubs, courses, classes, recreation, sports, and more) and relationships (neighbours, friends, families) and various organizational needs (scheduling medical appointments, travel planning, and more).
- Friday Night Meet-Ups and individual matching initiatives, which bring people with intellectual disabilities and other citizens together, through support for small interest-based weekly social gatherings, as well as one-to-one relationships (which may develop into friendships).
- Community-building through our three Family Feast dinner events, and the Make A Buzz Ottawa inclusive community celebration.

The most significant changes in 2017-2018 included ending large group travel support and the New Year's Eve party. In both cases there were sustainability issues without easy answers. Travel support has not been eliminated but is now part our Life Coach and Community Connecting supports (helping individuals or small groups of individuals with travel plans - this may also include volunteers from our matching initiative or Friday Night Meet-Ups). The same is true for those who would like help making plans for New Year's Eve.

In April 2018, we completed our first full year as an Ontario Disability Support Program Employment Supports service provider. This is currently one of the only means available to LiveWorkPlay for sustaining our employment services. Although there are challenges, this is a relatively stable funding source which is a vast improvement after almost 10 years of cobbling together various time-limited grants.

Our Employment Supports are funded mainly through our status as service providers with the Ontario Disability Support Program - Employment Supports. We also augment our fee-for-service agreement with ODSP-ES with grants (such as the Employment and Modernization Fund, currently being utilized to renew and expand our Employment Task Force, which generates most of our private sector job leads).

It is widely recognized that although people with intellectual disabilities make excellent employees for the long term, it is also known that the initial job search and onboarding tends to be more complex for this population.

LiveWorkPlay does not receive any additional funding to compensate for this additional work, and this is a challenge to the sustainability of our Employment Supports operations. Although the services available through ODSP-ES are clearly defined and these guidelines are shared with both employees and employers, the capacity challenge presented by the current situation can create difficulties in our relationships with individuals we support, their family members, and employers (see the *right relationships* section below).

This challenge is acknowledged by both the Developmental Services and ODSP departments at the Ministry of Community and Social Services, and we hope to work with them as well as other agencies and employment networks to find a long-term solution.

It must be noted that despite the challenges of learning a new funding formula and making it work for a population that is in many ways not a natural fit for ODSP-ES, LiveWorkPlay exceeded our job targets in 2017-2018 and they have been increased for the coming year.

“Despite the challenges of learning a new funding formula and making it work for a population that is in many ways not a natural fit for ODSP-ES, LiveWorkPlay exceeded our job targets in 2017-2018 and they have been increased for the coming year”

### **Right relationships with members and families**

It’s an obvious reality that LiveWorkPlay cannot be all things to all people – that is a practical observation, but also a philosophical, methodological, and ideological perspective on our role in the lives of individuals and our community.

We are part of the complicated world of “human services” whereby the relative stability of government funding is essential, but at the same time places us in a sometimes-contentious middle ground. That middle ground lies between the funder (primarily the Ministry of Community and Social Services and its mechanisms such as Developmental Services Ontario and Ontario Disability Support Program) and the individuals we serve (and the people in their lives: from family, to friends, to co-workers and others who are often providing a combination of care and advocacy, trying to find their way through the complexity in challenging or even crisis circumstances).

In our strategic planning with consultant Mike Coxon in 2016-2017, it became clear that an operational error we were making time and again was trying to be too many things and trying to do too much. This is an instinctive response to human need, but also a recipe for becoming overextended and burning out. In not being at our best, we are contributing to individual and family stress instead of doing less but doing it well, and thereby making the most beneficial impact in people's lives and for our community.

Establishing right relationships means that we must effectively convey information about the supports and services we deliver, and make sure that (within the bounds of various privacy agreements) we communicate on progress. We have been focusing on improving this transparency and learning how to better establish accurate expectations.

A key effort in 2017-2018 was to ensure that support agreements are provided to every individual, whether they involve Developmental Services Ontario (direct Ontario government funding placements) and/or fee-for-service (through the Ontario government Passport initiative and/or through private funds). These agreements explain the type of support, as well as the hours of direct and indirect staff involvement.

In looking at past misunderstandings with our Life Coach and Community Connector services, the breakdown of costs for service delivery were not clear enough for individuals and families to easily understand. Since revising our support agreements, even though the individuals or families may not always be fully satisfied with the amount of support that they are receiving, they better understand that this is not in our control (and that we will assist them with direct or indirect advocacy where appropriate). Misunderstandings about what was promised and what is being delivered have become a rarity, making for better results and healthier relationships.

“Establishing right relationships means that we must effectively convey information about the supports and services we deliver, and make sure that (within the bounds of various privacy agreements) we communicate on progress”

A challenge also exists regarding expectations of the *purpose* of the supports that LiveWorkPlay provides, and this can also lead to misunderstandings. For example, our supports are never custodial – we can help people in their life decisions, but only if they ask us for our help – knowing that they are not required to follow our advice. Sometimes a person we support might make a decision that does not meet with the approval of their family members, and they might expect that LiveWorkPlay would have intervened in some way to stop it from happening.

While we do have a duty of care related to serious harms (for example, abuse and/or other crimes) that will be appropriately reported to third parties, our duty to protect the privacy of individuals we are supporting and to respect their decisions is otherwise a foundational aspect of our relationship with those we support.

To help minimize this type of misunderstanding, as mentioned in the board report, we have formally adopted the *Just Enough Support* approach, which we are now discussing with newcomers and existing members alike. This is not a new approach for LiveWorkPlay, but rather a new way of explaining what we do, why we do it, and how we do it.



The *Just Enough Support* concept is about always seeking to ensure that a person has enough support but is not being “over-supported.” In other words, instead of deciding that there are tasks or situations that a person cannot manage for themselves, or that their abilities to manage it at this time cannot be improved, paid staff support is viewed as meeting a need that can change over time.

Further, in partnership with the individual (and their family and other supporters as applicable) it is part of our role at LiveWorkPlay to look for ways that the person can develop, grow, and take greater control of all aspects of their life. We are here to help, but not to create, develop, or maintain unnecessary dependencies.

In addition to human supports *Just Enough Support* also means paying attention to technological solutions. For example, shut-off devices can help reduce risks related to cooking. There are now types of locks that remove concerns about key management. There are community-based services that can help with money management, laundry, and more.

Instead of being fixed in our mindset that only LiveWorkPlay staff can fill the needs of the people we serve, we are called to work together with individuals and their networks to see what more the person can do themselves, and how they might benefit from natural supports and community connections. This can include other individuals who they already know, or with help might come to know, as well as other venues and services in the community. These could be specialized supports through a service that is specifically targeted to people with disabilities, or it could be services that are utilized by all citizens.

We are currently working on a video series that helps explain *Just Enough Support* and believe that this will be of immense help to prospective members (people who wish to access our services), their families, and referral agencies. Because many people are used to a programmatic approach to services, it can be a bit of shock when what we want to do is get to know them and help them develop a plan to enjoy life in the community.

This sounds logical, but it is also overwhelming – the choices and opportunities available from this approach are literally endless, whereas a program approach usually has just a handful of choices.

We are hopeful that the video series can help with plain language explanations and real people sharing their experiences.

Our employment supports services are in some ways easier to explain since the point is clear: to help the person get a job that they enjoy with an employer who appreciates them (and pays them at minimum wage or better).

There is however the potential for misunderstandings with individuals, families, and employers who may not fully appreciate the limits of Ontario Disability Supports Program – Employment Supports, which is a fee-for-service system based on specific milestones. To operate with reasonable sustainability, our employment team cannot stray too far from limitations of the ODSP-ES funding formula.

“It is part of our role at LiveWorkPlay to look for ways that the person can develop, grow, and take greater control of all aspects of their life. We are here to help, but not to create, develop, or maintain unnecessary dependencies.”

As reported in the *sustainable portfolio* section above, we are aiming to develop a more sustainable funding agreement with Developmental Services and/or ODSP-ES, but in the meantime, we will continue to work on transparent communication about the process. It should also be noted that beyond the limits associated with funding and staff caseloads, a *Just Enough Support* concept is also important for successful employment.

There is such a thing as “too much employment support” because over-reliance on employment support staff can indicate that we are getting in the way of the employee and their co-workers developing the natural workplace relationships that will ultimately ensure a successful outcome.

The development of the *right relationships* strategic direction therefore applies not only to members and their families but extends also to relationships with individuals and organizations in all sectors of the community where our work intersects – from landlords, to health providers, to sports leagues, to employers.

There are more than 3000 charitable organizations, just in the Ottawa area, and more than 15 of those serve a similar population as LiveWorkPlay. We can never assume that any person or organization will easily differentiate our portfolio of services and our approach to delivering them from others. This only confirms the importance of our vibrant communications strategy and our leading-edge engagement with social media and traditional media.

### **Building a leaderful organization by investing in quality people and training**

This is certainly not a new operational priority, but with this strategic direction adopted by the board of directors, there is renewed focus on the type of outcomes we are seeking with investments in our staff and volunteers.

Over the past 9 months the most significant operational change was the development of Team Lead positions within the Senior Staff team. Grace Hudson, Allison Moores, and Anna Nelson directly support members of the staff team who work with individuals in delivering our Life Coach and Community Connector services and/or Employment Supports.

Jen Soucy and Tammy Whelan are also part of the Senior Staff team, with a focus on employer partnerships. They do not directly support other members of the staff team, but they work closely with Anna Nelson so that the Employment Supports team is prepared for hiring requests and other developments, resulting primarily from the efforts of the Federal Employment Strategy Group and the Employment Task Force. They also publicly represent the organization to private sector, government, and non-profit organizations.

Your authors of this report – Julie Kingstone and Keenan Wellar – are the operational co-leaders of the organization, reporting to the Board of Directors. Julie is Director of Operations and Keenan is Director of Communications. Julie provides direct support to all members of the Senior Staff, as well as to Alex Darling (Volunteer Coordinator and People Connector). Keenan

works with all Senior Staff on internal and external communications, including social media, website, traditional media, and marketing materials, and directly supports the entire staff team with hardware, software, and digital technology.

Grace, Allison, and Anna also work with individuals, families, and referral agencies for intake and ongoing service relationships. Grace is the lead on fee-for-service and Allison for referrals through Developmental Services Ontario, while Anna is focused on Ontario Disability Support Program Employment Supports referrals.

In addition to the new Team Lead structure and more focused roles for all Senior Staff, the entire organization has evolved a coaching format for evaluation, with similar processes for the Board of Directors, Executive Staff, Senior Staff, Life Coach and Community Connectors, and Employment Supports teams. This is consistent with leading-edge research and practices about how to best support individual and organizational excellence, and the feedback (and results) are overwhelmingly positive.

There is no member of the staff team more important than those who are working directly with the individuals who trust us to support them in their daily lives, and the only reason each is not mentioned by name in this section is that the list is too long for this part of the report. However, please see the staff directory with follows this report.

Starting in 2018 we also introduced annual staff anniversary celebrations, via a special blog on our website with each anniversary date. These have been wildly popular, and we will continue this throughout 2018-2019. A new staff milestone recognition ceremony will be introduced at the Welcome Back Family Feast in September.

Professional development opportunities are important, and each staff member will have their own plan for the coming year, with opportunities that provide clear linkages to supporting organizational outcomes. For example, Wendy MacEwan, Alex Darling, and Rebecca Coxon will be attending the Toronto Summer Institute on inclusion, Diversity, and Inclusion in July.

“There is no member of the staff team more important than those who are working directly with the individuals who trust us to support them in their daily lives”

In 2017-2018, Julie and Keenan completed their Core Gifts Master Facilitator certification with Bruce Anderson. Helping supported individuals discover their gifts is part of the staff team’s role, and Julie and Keenan are now introducing new staff to the concept as a part of their orientation. Julie also completed a Certificate in Applied Positive Psychology, which has aided in the development of the new coaching style of staff support.

As part of an Ontario Ministry of Community and Social Services Employment and Modernization Fund Project with the Ottawa Developmental Services Network (ODSN), Allison and Grace are part of a cohort of Ottawa area staff who are completing person-centred training accreditation with Helen Sanderson & Associates Canada.

In addition to the leadership of the volunteer board of directors, LiveWorkPlay benefits from the leadership of many others who are not part of the staff team. This includes individuals supported by the organization, without whom we could not share purposeful stories about our work. They are overcoming barriers, often with many risks attached, to live in homes of their own, pursue their dream job, make friends, and enjoy a full life in the community.

We want to do more to offer leadership opportunities for the individuals who honour us with the opportunity to support them. There is much more to who they are than the services we provide them. In 2018-2019 we will be working to broaden our messaging to both internal and external audiences to ensure that we do not create the false impression that their lives are dependent upon LiveWorkPlay. We appreciate their grace and gratitude in being thankful for our staff and other resources of the organization, but we will be working hard to make sure it is understood that their value to the community did not come from LiveWorkPlay – our role is often mostly about ensuring that others get a chance to see it.

Family members of people we support are huge champions for the organization as well as advocacy about issues that reflect our vision, mission, and values. It has been a priority to find a way to formally include family members in the organization's structure. At least 15% of the board's voting membership is now allocated to family members (as per the new board policy) and this is just one of many steps being taken to offer opportunities for parent, sibling, and other family leadership.

As will be discussed later, LiveWorkPlay has a lot of work to do in priority areas such as *promoting a welcoming community and reducing barriers* as well as *sustainable and mutually beneficial strategic partnerships*. We are going to need help from family members to have the best opportunity for success in these areas.

Last but certainly not least, our volunteer team, more than 150 strong, currently brings tremendous leadership, but also great potential for more.

Whether it is direct participation in our Employment Task Force, Community Task Force, or Federal Employment Strategy Group, or as an add-on to supporting Friday night meet-ups or being a one-to-one match, our volunteers bring a critical perspective as citizens from all walks of life who "get it." Their personal and professional networks open doors for LiveWorkPlay and the people we support. We know there is untapped potential and we will be making more invitations in the coming year to help share their perspective with the world, and to help guide us in our efforts. This is an important presence alongside family members for contributing to our *welcoming communities* and *strategic partnership* priorities.

We mentioned earlier the popularity of the staff work anniversary blogs – although our volunteer team is an incredibly modest and humble group, we are going to do our best to convince at least some of them to allow us the privilege to celebrate them in a similar fashion. Alex has already started a campaign on our Twitter account to help celebrate the incredible relationships we have facilitated through our matching initiative.

"We want to do more to offer leadership opportunities for the individuals who honour us with the opportunity to support them. There is much more to who they are than the services we provide them."

## Promoting a welcoming community and reducing barriers

This is the final frontier in terms of the change we want to see: as communities become more welcoming and barriers are reduced, the work of organizations like LiveWorkPlay will continue to shift away from what individuals need to overcome barriers and exclusion, and more towards what communities need to champion welcoming and inclusion. And one day, our vision, mission, and values will be embedded in the practices of regular community venues. Yes, one day, we will happily close our doors.

But this is an outcome that will be many more decades in the making. In many ways, people with intellectual disabilities are only just now making their way *into* the community, and there is much work to be done to ensure that are *of* the community.

Much of the most important research and practices around welcoming communities has been done in the field of immigration. This includes the 2010 report “Characteristics of a Welcoming Community” commissioned by Citizenship and Immigration Canada. Although targeted to a different population, this is a document rich in practical and theoretical evidence that is of great relevance for supporting the inclusion of people with intellectual disabilities.

The list below represents their ranked findings of what is most important for the experience of a welcoming community (associated with the immigrant population).

1. Employment opportunities
2. Fostering of social capital
3. Affordable and suitable housing
4. Positive public attitudes towards the population
5. Presence of population-serving agencies that can successfully meet needs
6. Links between main actors working toward welcoming communities
7. Municipal features and services sensitive to the population
8. Educational opportunities
9. Accessible and suitable health care
10. Available and accessible public transit
11. Presence of diverse religious organizations
12. Social engagement opportunities
13. Political participation opportunities
14. Positive relationships with the police and the justice system
15. Safety
16. Opportunities for use of public space and recreation facilities
17. Favourable media coverage and representation

To operationalize based on such a list requires an initial process of attempting to re-order the list based on what we know about our own population vs the immigrant population, and then identifying areas where we are already strong vs where we have limited engagement, and then finally making decisions about any needed shifts.

We know some of our own existing strengths from the list, including a focus on employment and social capital, but we have much more to learn about the strengths of our own community in many of these areas that are outside of our typical interactions.

In the immediate term, we are utilizing this welcoming community framework to help make decisions about partnerships (see below).

### **Sustainable and mutually beneficial strategic partnerships**

As mentioned in the report from the Board of Directors, we have recently joined the Ontario Non-Profit Housing Association and the Canadian Housing and Renewal Association, as well as the Alliance To End Homelessness. Membership with these organizations does not constitute the establishment of partnerships, but in working towards similar goals, we can develop relationships that position us for emerging opportunities. It is also an opportunity for LiveWorkPlay to contribute to the work of these organizations, who may not have considered people with intellectual disabilities in their thinking or may benefit from our perspective.

Our partnership with the Multifaith Housing Initiative has delivered an incredible result for eight of our members who are living in their Haven in Barrhaven community. Although this partnership came about through an informal process, it serves as an example of what can happen when we make connections outside of our own sector.

That is not to say that we do not value our partnerships with those doing similar work. Over the past three years we have invested in our membership with the From Presence To Citizenship collaborative of individual agencies across the province. Also participating in that initiative is Community Living Ontario, who were also very active in direct communications with LiveWorkPlay, frequently featuring stories of our work in their popular Update Friday e-zine. We also count on Community Living Ontario for timely analysis of social policy proposals or announcements.

The From Presence To Citizenship project has helped in influencing provincial social policy and has promoted sector-wide learning through a series of well-attended conferences. While the initiative itself has always been framed as a project and may or may not continue beyond 2018-2019, our relationships with individual agencies, their staff, and their boards are likely to continue for many years to come. We give special thanks to project leader Jim Turner from Community Living Atikokan for taking on the complex task of facilitating a collaboration from all corners of Ontario.

LiveWorkPlay has always believe that independent voices of family members of people with intellectual disabilities and autism are critical to a healthy Developmental Services sector as well as for the effective promotion of social inclusion on our community.

To this end we have formalized our partnership with Families Matter Co-op, providing financial and other assistance to their efforts to ensure family members have not only the information they need about the resources available to their loved ones, but also have a means for collective communications about their needs and concerns.

Just as it is important that we connect with non-profit organizations and collaboratives with the Developmental Services sector as well as in other sectors, there are opportunities to work with business and government organizations.

In 2017-2018 partnership with employers continued to deliver amazing outcomes for our members as well as assisting LiveWorkPlay in promoting outcomes and values of inclusion and diversity. Examples were featured at our sold-out Make A Buzz Ottawa Celebration, and included Pita Pit multiple franchise owner Andrew Scott and the Canadian Food Inspection Agency. In both cases the hiring of people with intellectual disabilities was only one aspect of the relationship. Andrew promotes inclusive hiring to other business owners, and CFIA is determined not only to increase their own hiring, but to offer support to other government departments to join in.

St. Anthony's Banquet Hall has been our home for events for more than 5 years and more than 25 occasions, but this year the nature of the relationship as "more than a customer" became clear when our office building was closed for several months due to flooding. St. Anthony's provided LiveWorkPlay with free office space, and in addition, decided to hire two of our members who started work on their maintenance team in May!

We must also recognize multi-year support from BNI Eastern Ontario, Quickie Convenience Stores, Pylon Electronics, and Dow Honda, Star Motors, and Kanata Honda. BNI hosts their annual golf tournament (every June) with all proceeds to LiveWorkPlay, and leaders Jocelyne D'Aoust and Denis Brisson join us as presenters at Make A Buzz Ottawa. Quickie, Pylon, and the auto dealerships mentioned not only major sponsors of Make A Buzz, they have all hired at least one person with an intellectual disability.

The depth of these relationships is difficult to capture in words but will be forever grateful for the people and organizations that have invested in the cause of a more inclusive community, and who are truly delivering the change we want to see.

*Keenan Wellar & Julie Kingstone  
Co-Leaders, LiveWorkPlay.ca*

"We have formalized our partnership with Families Matter Co-op, providing financial and other assistance to their efforts to ensure family members have not only the information they need about the resources available to their loved ones, but also have a means for collective communications about their needs and concerns."

## **Who's Who? LiveWorkPlay Staff Directory, June 2018**

**Julie Kingstone**, Co-Leader & Director of Operations

**Keenan Wellar**, Co-Leader & Director of Communications

**Allison Moores**, Support Coordinator

**Grace Hudson**, Team Lead, Life Coaches and Community Connectors

**Jen Soucy**, Manager of Employer Partnerships & Federal Employment Strategy Group

**Anna Nelson**, Team Lead, ODSP Employment Supports

**Tammy Whelan**, Manager of Employer Partnerships & Private Sector Employment Task Force

**Alex Darling**, Volunteer Coordinator & People Connector

**Alastair Gharthey**, Job Connector

**Joshua Gray**, Job Connector

**Laura Lobay**, Job Connector

**Kelly Fox**, Job Connector

**Lou Hawkins**, Life Coach and Community Connector (On Leave)

**Daniel Harris**, Life Coach and Community Connector

**Anthony Stratton**, Life Coach and Community Connector

**Wendy MacEwan**, Life Coach and Community Connector

**Roberta McKenna**, Life Coach and Community Connector

**Shayna Grey**, Life Coach and Community Connector

**Chris Floyd**, Life Coach and Community Connector

**Rebecca Coxon**, Life Coach and Community Connector

**Ron Kok**, Life Coach and Community Connector

**Batoul Auf**, Life Coach and Community Connector

**Carolyn Mills**, Life Coach and Community Connector

### Part-Time & Summer Staff

**Stephan Enaruna, Tola Stewart, Jennifer Cunningham, Emily Phan, Sophia Bouzrara**



## Ten More Top Stories of 2017-2018

Excluded from the list is our #1 story Make A Buzz Ottawa 2018 (already shared) and the work anniversary features of LiveWorkPlay staff team members. These anniversary blogs were all very popular and ranked within the top twenty! The next ten were all too close in popularity to rank. Here then, in random order, are the rest of our top stories for 2017-2018. Thank you for reading them, sharing them, and in the case of many of you who are viewing this report, thank you for being a part of the story!



The Foolish Family Feast (so named for proximity to April Fool's Day) features a celebration of diversity (typically marked by individual hat choices) as well as commemoration of World Down Syndrome Day.

Paul Knoll and Daniel Pinsonneault were co-chairs of this year's presentation, and people from all over the world joined in through our social media channels!



This is a story of national interest that we had covered through our YouTube channel many months earlier, when Prime Minister Justin Trudeau was questioned at a public town hall about immigration rules that treat people and families differently if they have a disability. We happened to share news of planned amendments very quickly after the news was released, and the share on our Facebook page spread quickly by the thousands. The popularity of this announcement speaks positively to how most Canadians value people with disabilities.

## Should people with intellectual disabilities be removed from Ontario's employment standards so they can work for sub-minimum wage? Regress or progress?

Saturday, 02 June, 2018 14:12

Written by Keenan Wellar



With the release of the terms of Bill 148 (new Employment Standards Act) in spring 2017, most of the agencies in Ontario still operating sheltered workshops or other sub-minimum wage work-like programs had already transitioned to person-centred services that support people to engage with their community for employment, recreation, volunteerism, and other authentic connections. When a story broke in May that there are movements in some communities to seek removal of people with intellectual disabilities

from the protections of the Employment Standards Act, LiveWorkPlay connected with Community Living Ontario, Community Living Upper Ottawa Valley, Canadian Down Syndrome Society, and other individual and organization advocates to voice support for the inclusion of all citizens in the fundamental rights provided through provincial labour laws. Although co-leader Keenan Wellar spoke to these issues on mainstream radio and television, by far the most popular interview (based on thousands of shares) was the half hour show on Accessible Media.



It's important to speak up when effective supports for people with intellectual disabilities are at risk.

LiveWorkPlay has welcomed many graduates of the Storefront program (Ottawa-Carleton District School Board) which helps those in their final years of high school with their transition to adulthood and, especially, employment.

Although LiveWorkPlay provided some background information to local media, it was family members who championed this cause, and our role was mainly to help spread the news. Cumulatively, these efforts were enough to trigger a full review and Storefront is safe – for now!

**LiveWorkPlay** is celebrating friendship. Published by Keenan Wellar · 10 February

Happy early Valentine's Day! A lovely story in the Ottawa Citizen about the friendship between Jalynn and Natalie - LiveWorkPlay helped bring them together, but the magic that happened from there is all about them! Original online article is here <http://ottawacitizen.com/news/local-news/meeting-of-the-minds> or click here <http://liveworkplay.ca/docs/jalynn.jpg> for a full-sized image that you can read with ease and also a PDF that you can read or print <http://liveworkplay.ca/docs/jalynn.pdf> and here is a view of the article as it appeared in the print edition <http://LiveWorkPlay.ca/docs/jalynnncitizen.jpg>

**Meeting of the minds: How two strangers became friends**



They thought each other's success in volunteerism meant forming work...

What a brilliant idea! The Ottawa Citizen decided to do a major feature for Valentine's Day that was more inclusive – talking about relationships beyond the limited topic of romantic couples and extending into an examination of friendships and the different ways they are formed and grow over time. When LiveWorkPlay was asked to share our approach for bringing people together, Volunteer Coordinator and People Connector Alex Darling connected writer Joanne Laucius with Jalynn and Natalie, and one of our most popular stories of the year was born!

**LiveWorkPlay** is with Julie Kingstone and Keenan Wellar. Published by Keenan Wellar · 18 January


Check out this LiveWorkPlay feature in the Ottawa Sun!  
<http://liveworkplay.ca/.../2018/01/18/liveworkplay-ottawa-sun/>

**Walker: LiveWorkPlay – a community where everyone belongs**

Kimothy Walker

Published: January 17, 2018

Filed Under: Ottawa Sun · News · Ottawa



**LiveWorkPlay.ca**  
WHERE PROGRESSIVE MEET PEOPLE

Original article:  
<http://bzbz.ca/SUN-1-18-2018>

Keenan and Julie were awarded the Amazing People designation. Wayne Cullington / Postmedia

Telling the stories of Ottawa and its residents for almost 30 years [...]

Human interest stories are always the way to the hearts and minds of an audience, and just like the story above with Jalynn and Natalie, this piece by Kimothy Walker in the Ottawa Sun drew a huge readership of the original article, as well as the shares on our Facebook and Twitter channels.

As detailed in the Executive Staff Report on Operations, leadership at LiveWorkPlay is all about collective efforts, but the journey of the organization's founders is a story that continues to bring interest and profile to the organization. Readers were touched by the references to Julie's mentor, Dr. Dan Offord who passed away in 2004 after a remarkable life of championing the positive development of children, and his leadership at Christie Lake Camp (where Julie worked for many years prior to LiveWorkPlay).

## LiveWorkPlay Celebrates United Nations International Day of Persons with Disabilities

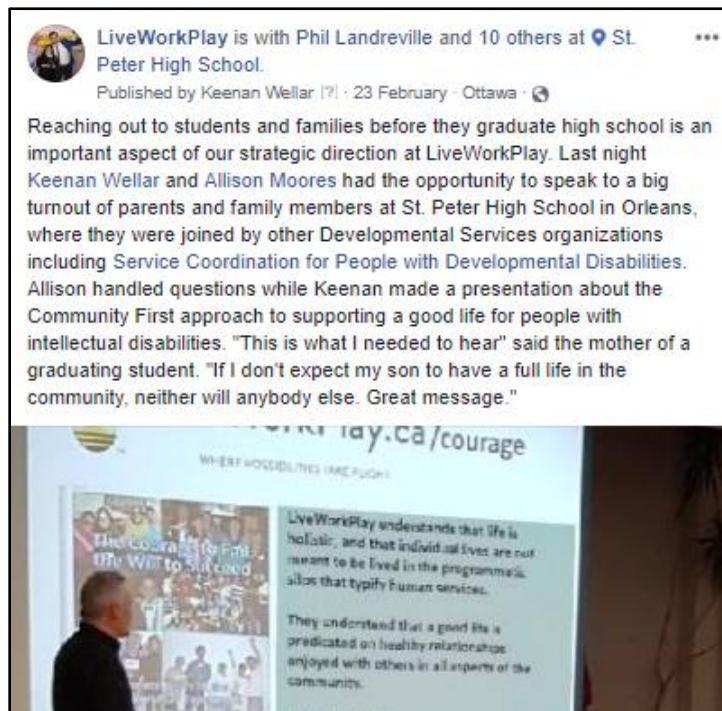
Monday, 27 November, 2017 10:00  
Written by Keenan Wellar

Although this annual December 3rd observance is a single date on the calendar, it has always been a favoured opportunity for LiveWorkPlay to celebrate progress towards a more inclusive local, provincial, national, and international community. In fact, all of our guiding statements – mission, vision, and values – were derived from the United Nations Convention on the Rights of Persons with Disabilities. This year we are turning International Day of Persons with Disabilities into a full week of exciting events involving many individuals, organizations, and partners in the community!

MONDAY, NOVEMBER 27: VIDEO LAUNCH!



For this year's celebration of United Nations International Day of Persons with Disabilities, LiveWorkPlay delivered an ambitious agenda of multiple events and stories, and it worked – we generated more interest than ever before! In fact, looking at the combined statistics for all the components, this story was second only to Make A Buzz Ottawa. The week-long celebration included the release of the ISED employment video featuring Tara Pahwa, hosting the Ottawa site for the launch of the HireForTalent.ca initiative, and an employment awareness event at Pita Pit (Ogilvie Road) coordinated with simultaneous events in Edmonton (Gateway) and Halifax (TeamWork).



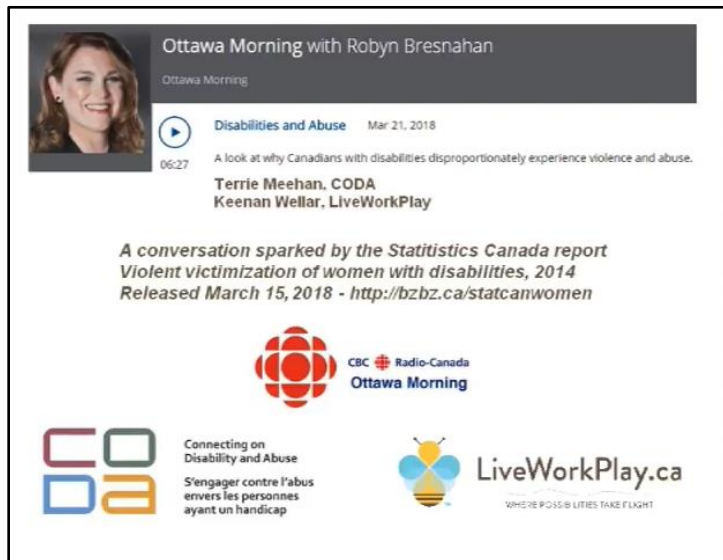
If there's one thing we've learned through our many years of investing in social media, it's hard to predict how a public audience will react.

After Allison and Keenan participated in an information session at St. Peter High School, it was almost an afterthought to share a photo and few quick thoughts about the experience, but the story resonated especially with parents of children with intellectual disabilities in high school. By sharing the presentation, hundreds of people who did not attend the event in person were able to access the information and shared their appreciation with us online.



In the fall of 2017, LiveWorkPlay had attended numerous meetings hosted by representatives from the Ministry of Community and Social Services who at the time seemed clear that there were no plans in place to address the ongoing problem of agency budgets losing ground to inflation year after year since 2009. The Developmental Services community came together to communicate directly with the public about these challenges, and we were surprised (and thrilled) by the level of interest in the stories we contributed to this effort. Many of our own constituents were surprised to learn

that core agency budgets had been frozen for almost ten years. Many lessons were learned from this campaign, and the first was by the sector at large: that putting aside various certain differences to unite around shared values could be very effective (MCSS announced budget increases in the spring) and the second was that we need to do a better job of sharing our challenges with a wider audience.



Our communications efforts are not only about sharing happy stories, and so we end our top ten of 2017-2018 on a serious note. Violence against people with disabilities – particularly as experienced by women – remains as a massive problem in our communities, and progress is limited, to the point of being discouraging. People with intellectual disabilities are also at greater risk than the general disability population. The issue is one that requires a dramatic increase in attention. These problems can only be addressed by coordinated

efforts between disability organizations, grassroots community movements, and all levels of government coordinating across multiple departments, including law enforcement, justice, social services, housing, and more. It won't be easy and at this time, LiveWorkPlay will be looking to contribute to generating the level of awareness required bring about action.

# Financial Statements: Selected Pages from the Auditor's Report\*

**MITCHELL & HOLMES**  
CHARTERED PROFESSIONAL ACCOUNTANTS

B.N. Mitchell, B.A., CPA, CA  
R.D. Holmes, B. Comm., CPA, CA

150 Isabella Street, Suite 302  
Ottawa, Ontario  
K1S 1V7  
Tel: (613) 231-5559  
Fax: (613) 231-5722

## INDEPENDENT AUDITOR'S REPORT

To the Board of Directors of LiveWorkPlay:

We have audited the accompanying financial statements of LiveWorkPlay, which comprise the statement of financial position as at March 31, 2018, the statements of operations, changes in net assets and cash flows for the nine-month period then ended, and notes, comprising a summary of significant accounting policies and other explanatory information.

### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

### Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on our judgement, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, we consider internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis of our qualified audit opinion.

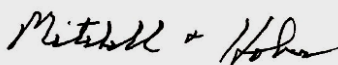
### Basis for Qualified Opinion

In common with many not-for-profit, LiveWorkPlay derives part of its revenue from donations and other fundraising sources the completeness of which is not susceptible of satisfactory audit verification. Accordingly our verification of these revenues was limited to the amounts recorded in the records of LiveWorkPlay.

Therefore, we were not able to determine whether any adjustments might be necessary to donation and fundraising revenues, excess of revenue over expenses, and cash flows from operations for the years ended March 31, 2018 and June 30, 2017, current assets as at March 31, 2018 and June 30, 2017 and accumulated net assets as at the beginning and the end of the years ended March 31, 2018 and June 30, 2017. Our audit opinion on the financial statements for the year end June 30, 2017 was modified accordingly because of the possible effects of this limitation in scope.

### Qualified Opinion

In our opinion, except for the possible effects of the matter described in the Basis for Qualified Opinion Paragraph, the financial statements present fairly, in all material respects, the financial position of LiveWorkPlay as at March 31, 2018, and its results of operations and its cash flows for the nine-month period then ended in accordance with Canadian accounting standards for not-for-profit organizations.



"In our opinion, except for the possible effects of the matter described in the Basis for Qualified Opinion Paragraph, the financial statements present fairly, in all material respects, the financial position of LiveWorkPlay as at March 31, 2018, and its results of operations and its cash flows for the nine-month period then ended in accordance with Canadian accounting standards for not-for-profit organizations."

\* The complete LiveWorkPlay Financial Statements are 16 pages including notes. The full document can be viewed at <http://liveworkplay.ca/docs/AGM-2018>

**Note from Julie Kingstone, Director of Operations:**

In examining the comparison figures, please note that due to our change of year end from June 30 to March 31, the 2018 numbers represent 9 months of operations, not 12.

In the case of the Office Rent line item in (see Statement of Operations) the significantly lower figure for 2018 is not due solely to the shortened year – our office building at 2197 was closed following a flood at the end of October, and no rent was paid until the building re-opened in March. Because our temporary office space was provided free of charge by St. Anthony’s Banquet Hall, there was a substantial reduction in Office Rent, as reflected in the statement.

LIVEWORKPLAY  
STATEMENT OF FINANCIAL POSITION  
MARCH 31, 2018

	<u>March 31</u> <u>2018</u>	<u>June 30</u> <u>2017</u>
<u>ASSETS</u>		
CURRENT ASSETS		
Cash	\$1,235,054	\$1,065,339
Receivables (Note 13)	46,103	70,485
Prepaid expenses (Note 9)	<u>18,609</u>	<u>39,884</u>
	<u>1,299,766</u>	<u>1,175,708</u>
PROPERTY AND EQUIPMENT (Notes 2, 4)		
Computer equipment	162,511	157,083
Furniture	90,276	90,276
Leasehold improvements	<u>89,353</u>	<u>89,353</u>
	342,140	336,712
Less accumulated amortization	<u>285,397</u>	<u>266,643</u>
	<u>56,743</u>	<u>70,069</u>
	<u>\$1,356,509</u>	<u>\$1,245,777</u>
<u>LIABILITIES</u>		
CURRENT LIABILITIES		
Accounts payable and accrued liabilities	\$ 24,284	\$ 53,599
Deferred contributions (Note 5)	<u>20,333</u>	<u>14,775</u>
	44,617	68,374
DEFERRED LEASE INDUCEMENT (Note 10)	9,808	12,850
DEFERRED CAPITAL CONTRIBUTIONS (Note 8)	<u>2,885</u>	<u>5,177</u>
	<u>57,310</u>	<u>86,401</u>
<u>ACCUMULATED NET ASSETS</u>		
NET ASSETS		
Invested in capital assets (Note 6)	53,858	64,892
Net assets internally restricted (Note 11)	1,245,341	1,094,484
Unrestricted	<u>-</u>	<u>-</u>
	<u>1,299,199</u>	<u>1,159,376</u>
	<u>\$1,356,509</u>	<u>\$1,245,777</u>

LIVEWORKPLAY  
STATEMENT OF OPERATIONS  
FOR THE NINE-MONTH PERIOD ENDED MARCH 31, 2018

	<u>9 months</u>	<u>12 months</u>
	<u>2018</u>	<u>2017</u>
REVENUE		
Ministry of Community and Social Services (Note 3)	\$1,141,970	\$1,389,852
Fee for service	158,612	172,298
Grants (Note 3)	71,752	99,746
Donations	38,886	84,395
Supported travel and events	23,929	50,871
Events	8,613	34,896
Investment income	5,192	5,246
Miscellaneous	2,408	13,779
Amortization of deferred capital contributions	2,292	3,056
Gain on disposal of condominiums	-	26,514
	<u>1,453,654</u>	<u>1,880,653</u>
EXPENSES		
Wages and benefits	960,934	1,326,236
Program supplies	136,619	139,046
Vehicle	39,906	56,324
Office rent	27,085	87,562
Supported travel	26,009	52,459
Amortization	18,754	25,184
Telephone and internet	18,602	27,468
Training	18,305	47,356
Professional fees	17,127	27,296
Advertising and promotion	16,747	23,493
Events	16,745	43,577
Meetings	9,043	8,354
Office supplies	4,864	26,424
Insurance	2,162	3,182
Bank charges and interest	929	1,535
Condo fees	-	5,623
	<u>1,313,831</u>	<u>1,901,119</u>
EXCESS OF REVENUE OVER EXPENSES	<u>\$ 139,823</u>	<u>\$ (20,466)</u>



LIVEWORKPLAY  
CASH FLOW STATEMENT  
FOR THE NINE-MONTH PERIOD ENDED MARCH 31, 2018

	<u>9 months</u> <u>2018</u>	<u>12 months</u> <u>2017</u>
<b>NET INFLOW OF CASH RELATED TO THE FOLLOWING ACTIVITIES:</b>		
<b>OPERATING</b>		
Excess of revenue over expenses	\$ 139,823	\$ (20,466)
Items not affecting cash:		
(Gain) on disposal of condominiums	-	(26,514)
Amortization of deferred capital contributions	(2,292)	(3,056)
Amortization	<u>18,754</u>	<u>25,184</u>
	156,285	(24,852)
Change in non-cash operating working capital items:		
Receivables	24,382	(1,521)
Prepaid expenses	21,275	(15,969)
Accounts payable and accrued charges	(29,315)	9,320
Deferred lease inducement	(3,042)	(4,056)
Deferred contributions	<u>5,558</u>	<u>(86,908)</u>
	175,143	(123,986)
<b>INVESTING</b>		
Proceeds from disposal of condominiums	-	317,381
Additions to capital assets	<u>(5,428)</u>	<u>(13,320)</u>
<b>NET CASH INFLOW</b>	169,715	180,075
<b>CASH, BEGINNING OF YEAR</b>	<u>1,065,339</u>	<u>885,264</u>
<b>CASH, END OF YEAR</b>	<u>\$1,235,054</u>	<u>\$1,065,339</u>

# **AGENDA: LIVEWORKPLAY ANNUAL GENERAL MEETING 2018**

**Monday, June 25, St. Anthony's Banquet Hall, Ottawa (Please check in by 5:15pm)**

- 1) Call to order and opening remarks (Cathy Velazquez)
- 2) Approval of the agenda (Cathy Velazquez)
- 3) Approval of minutes from AGM 2017 (Cathy Velazquez)
- 4) Report from the independent auditor, questions to follow (Ross Holmes)
- 5) Appointment of the auditor for 2018-2019 (Cathy Velazquez)
- 6) Updating By-Law 2.4 (Changing year end from June 30 to March 31)
- 7) Report from the board of directors (Cathy Velazquez)
- 8) Report on operations (Julie Kingstone)
- 9) Report on communications (Keenan Wellar)
- 10) Candidates: Board of Directors 2018-2019 (Keenan Wellar)
- 11) Proposal for election of candidate slate (Cathy Velazquez)
- 12) Election of candidate slate (Keenan Wellar)
- 13) Adjournment (Cathy Velazquez)

## Board Member/Candidate Biographies

*LiveWorkPlay by-laws allow for a maximum of 7 and a minimum of 3 members of the Board of Directors, elected annually. For 2018-2019, all 7 of the current board members (biographies below) are standing for re-election.*

**Cathy Velazquez** brings more than 30 years of management experience spanning three highly regulated and competitive industries. A dynamic people leader and customer advocate, she has successfully led teams through significant business change and transformations. Cathy brings a positive approach to problem-solving, creating win-win situations, strengthening relationships and enhancing the brand. Cathy has built a solid reputation as a champion for diversity and inclusion in the workplace and the community. She first learned about LiveWorkPlay in 1998 through work placement initiatives, joined the Board of Directors in 2013 and is proud to be the current Chair of the Board of Directors.

**Daniel Spagnolo** is a Chartered Professional Accountant (CPA, CA) and graduate of the University of Western Ontario (B.A.C.S. – Finance and Administration and Economics). Since 2008, Daniel has worked at the Office of the Auditor General of Canada in the development of audit methodology and as an auditor specializing in the performance of special examinations of Crown Corporations. Prior to his work in the federal government Daniel was a financial audit manager at PricewaterhouseCoopers in Toronto and Ottawa. In that capacity, Daniel developed industry knowledge and expertise in the Mining, Manufacturing, Software and Technology, Health Care, First Nations and Not-for-Profit sectors. In addition to serving with the LiveWorkPlay board and the Stewardship Committee, he was an early participant with the Employment Task Force and an original member of the Federal Employment Strategy Group.

**Matthew Shipley** graduated with a BA from Concordia University, is a Certified Financial Planner (CFP) and completing his studies to become a Tax and Estate Practitioner (TEP). He began his career as a Financial Planner in Montreal in 2008 within his family's business, and now lives with his wife and children in sunny Kanata. As he has grown in our community, he has worked with LiveWorkPlay's Employment Task Force as a connector between local business owners and members looking for employment. He joined the Board of Directors in fall 2017 to further support the organization and advocate for its mission. He also served in 2017-2018 as a founding member of the Communications Committee.

**Christine Felteau** is a graduate of Carleton University (Bachelor of Arts – Economics) and the University of Ottawa (Master’s in Business Administration). Christine has worked in the financial sector for over 25 years in various management roles, including Business Development and Operations, the last ten years as an executive in Compliance. Christine has built a solid reputation as a compliance expert across Anti-Money Laundering, Privacy and the Bank Act. She first learned about LiveWorkPlay in 1998 when she started with MBNA Canada Bank as part of their work placement initiatives. She considers it a privilege to be a part of the continuing success of LiveWorkPlay, serving as a member of the Board of Directors since 2016, and as a member of the 2017-2018 Stewardship Committee.

**Brigid FitzPatrick** holds a BA in Sociology and Law in Society from the University of New Brunswick and a MA in Leadership from the University of Guelph. Brigid is an accomplished organizational leader and respected authority in community-based services and the non-profit sector. A well-established expert in disability, youth, and mental health service sectors she spearheads initiatives that improve services and supports for vulnerable individuals. Brigid adeptly leads agencies through change, growing and improving the delivery of innovative and successful client care programs, helping them overcome limited resources and systemic challenges. She served in 2017-2018 as a member of the Governance Committee.

**Kari Whatley** holds a BAH in Mathematics and a BEd in Secondary and Adult Education. She is a passionate educator that has taught and developed programs for individuals with physical and intellectual disabilities, as well as continuing education programs for adults. As a previous employee for LiveWorkPlay, she is a strong advocate for creating a welcoming community for those with intellectual disabilities to live, work and play as valued citizens. Currently, she works at Shopify as a Learning Designer. This role involves designing and developing programs to create a successful, innovative and inclusive Leadership team within Shopify. In 2017-2018 she served as a member of the Communications Committee.

**Michelle O’Doherty** is a lawyer and a graduate of the University of Ottawa in 2011. Since her articles and call to the bar, Michelle has worked at Bayne, Sellar, Ertel, Carter (formerly Bayne, Sellar, Boxall) and has represented clients in the Ontario Court of Justice and the Superior Court of Justice. She is passionate about the Charter of Rights and Freedoms and ensuring that her clients have a strong advocate who will fight for their rights at every step of the way. In 2009, during first year of law school, Michelle began volunteering with LiveWorkPlay’s Friday Night Meet-Ups and began serving on the Board of Directors in 2016. In 2017-2018 she also served as a member of the Governance Committee.

## MINUTES: LIVEWORKPLAY ANNUAL GENERAL MEETING 2017\*

Friday, September 8, 6:30PM

St. Anthony's Banquet Hall

523 St Anthony St.

Ottawa, ON K1R 6Z9, Canada

1. Chair of the Board of Directors Cathy Velazquez called the meeting to order at 6:37pm with opening remarks.

2. Approval of the Agenda (Cathy Velazquez)

Motion: Paul Hamilton

Second: Elena Blain-Ely

Carried.

3. Proposal for Voting via Yea or Nay (Cathy Velazquez)

Motion: Alex Winstan

Second: Heather McAdam

Carried.

4. Approval of minutes from AGM 2016 (Cathy Velazquez)

Motion: Elena Blain-Ely

Second: Warren Murphy

Carried.

5. Report from the Independent Auditor (Ross Holmes)

Ross Holmes is a Chartered Professional Accountant from the firm Mitchell and Holmes. He reported a "clean audit" with no issues. There were no questions.

6. Appointment of the Auditor for 2017-2018 (Cathy Velazquez)

It was proposed that Mitchell and Holmes be appointed the auditors for 2017-2018.

Motion: Marlene Burton

Second: Felice Miranda

Carried.

7. Strategic Plan Review Process Consultant's Summary (Mike Coxon)

Mike Coxon from Third Sector Consultation provided a visual and verbal summary of the process that was followed related to the Strategic Directions and Vision 2020 adopted by the Board of Directors and shared with the membership prior to the AGM.

8. Report from the Board of Directors (Cathy Velazquez)

Cathy shared a selection of comments from the Board's contribution to the Annual Report document provided to members prior to the AGM.

Nancy Brodie commented that the Strategic Directions do not specifically mention "person-centred." Cathy responded that the use of person-centred language and processes is at the

foundation of the organization's work and values, but that the Board would look at how to make sure this is made clear in all communications.

9. Report on Operations (Julie Kingstone)

Julie shared a selection of operations-related comments from the Executive Staff contribution to the Annual Report. There were no questions.

10. Report on Communications (Keenan Wellar)

Keenan shared a selection of operations-related comments from the Executive Staff contribution to the Annual Report. There were no questions.

11. Staff Recognition (Kari Whatley)

Board member Kari Whatley hosted a ceremony to celebrate the staff team.

12. Candidates: Board of Directors 2017-2018 (Keenan Wellar)

Keenan Wellar explained the election process and called the candidates to the stage to share some brief biographical information.  
Cathy also thanked Stacey Diffin-Lafleur, retiring board member, for her years of service and support of LiveWorkPlay.

13. Proposal for Election of Candidate Slate (Cathy Velazquez)

There being 6 candidates for 7 board positions it was proposed that the candidates be elected as a slate. Cathy explained that in light of Stacey's retirement, the Governance Committee has been interviewing candidates, one of whom will be added to the board within the next two months.

Motion: Paul Hamilton  
Second: Warren Murphy  
Carried.

14. Election of Candidate Slate (Keenan Wellar)

Motion: Elaine Murphy  
Second: Janet Balcome  
Carried.

Cathy Velazquez, Daniel Spagnolo, Christine Felteau, Kari Whatley, Brigid FitzPatrick, and Michelle O'Doherty were declared as elected.

15. Closing Remarks and Adjournment (Cathy Velazquez)

Motion to Adjourn: Josh Balanaser  
Second: Wendy Siebrasse  
Carried. Meeting adjourned at 7:57pm.

\* These are DRAFT minutes until approved by members at AGM 2018. The minute notes were taken on site by Anna Nelson, and edited to their current format by Keenan Wellar, who is Secretary to the Board of Directors.

NOTES



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WHERE POSSIBILITIES TAKE FLIGHT