



**Winnifred Stewart Association**

# **Annual Report**

**2001-2002**

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## ***Mission***

Working in partnership with individuals with developmental disabilities, their families and the community, to create and provide comprehensive services.

## ***Vision***

To enhance the quality of life for individuals with developmental disabilities.

## ***Guiding Principles***

We respect the fact that all persons should have privileges, rights, responsibilities and freedom to enjoy a quality of life that is in keeping with their lifestyle and abilities.

We are committed to continuously improving our programs and services and focusing on meeting client needs.

We believe in open communication and honesty with everyone in all our works.

We respect the physical, intellectual, social and spiritual needs of each individual.



## ***Programs and Services***

Residential Services offers personalized supports to individuals in a variety of residential settings in Edmonton. Individuals receiving service are presented with opportunities to maximize their quality of: home living, health care, family relationships, employment and community involvement. The Winnifred Stewart House is an assisted living home designed for individuals who are requiring increased supports as they are aging.

Work Opportunities offers facility-based work skills training, as well as support in achieving employment and working toward independence in community-based settings.

Recreation and Leisure Support Services offers individuals the opportunity to participate in a variety of recreation and leisure activities in both facility-based and community settings. Services and goals for personal development are based on the individual's unique skills, abilities and interests.

Volunteer Services offers the opportunity for members of the community to provide support to the Association and enhance the quality of service provision through a variety of volunteer experiences.

Client Services assists clients and their families in making application for services, acquiring and maintaining funding. The Service Coordination Committee reviews all applications to determine if the program meets the applicant's needs.

## ***Board of Directors***

President  
Vice President  
Treasurer  
Secretary  
Directors

Catherine Whalley  
Doug Lane  
Lise Grattan  
Susan Surgenor  
Judi Bell  
Gail Fisher  
Neil M. Horne  
Ian Logan  
Melanie Meheden  
Heide Morden  
Eleanor Nolt  
Shirley Pitts  
Janet Ross-Kerr  
Wayne Sembaluk  
Don Smith  
Pat Walker  
Harold Witte  
Dennis Stockman

Executive Director

## ***Committee Members***

Residential Services

Pat Walker (Chairperson)  
Gail Fisher  
Doug Parr  
Shirley Pitts  
Rose Sembaluk  
Harold Witte

Work Opportunities

Melanie Meheden (Chairperson)  
Lise Grattan (Vice-Chairperson)  
Grant Campbell  
Loran Conrad  
Ron Tookey

Recreation and Leisure Support Services

Heide Morden (Chairperson)  
Judi Bell

# ***President's Report***

*"Dreams come true; without that possibility,  
nature would not incite us to have them"*  
- John Updike (1932 - )

*"Dreams are the touchstones of our characters"*  
– Henry David Thoreau (1817 – 1862)

Forty-nine years ago, Winnifred Stewart had a dream; she dreamt of a community where individuals with developmental disabilities were accepted and welcomed and provided opportunities to become the best they could be. Today, that community exists: the Winnifred Stewart Association. Since 1953, this association has enhanced the quality of life for individuals with developmental disabilities.

How we have done this has changed and evolved over the years. The first 20 years are what we are best known for: the School. The *Winnifred Stewart School* provided the one of the first formal education settings in Canada for children with developmental disabilities. With the guidance of dedicated teachers and parent volunteers, children experienced the joy of mastering the basics of education, while often forging lifelong friendships with classmates.

In 1970, we opened our first home for individuals who wanted or needed to live independently of their families. This was the first of what is now a network of nine houses providing homes for 47 people around the city. The first house was considered revolutionary, as is our ninth home: the Winnifred Stewart House provides an assisted living environment for our clients as they age, so that these folks can continue to live and be cared for amongst friends. We are now fundraising to build our second assisting living home, to meet the growing need.

As individuals, when we introduce ourselves to others, we often mention what it is we do for a living. Work is one way that we define ourselves. In recognition of this, in 1978, Cerwood Enterprises opened, providing work opportunities to adults. Over the years, Cerwood evolved into "Work Opportunities", and encompasses both in-house work opportunities as well as job placements with employers throughout the community.

Another way that we as individuals define ourselves and seek personal growth is by our leisure-time activities, and the Winnifred Stewart Association recognized this opportunity for our clients. In 1996, the Personal Development Program was started, and has evolved in the Recreation and Leisure program.

This program provides lifestyle choices and opportunities for the development of personal interests such as cooking, fitness, computers and games.

There are other, behind-the-scenes, programs that have developed over the years to support all we do as an association: Sales and Promotions, the Volunteer program, Client Services, and Public Relations and Fund Development.

On behalf of the board of the Association, I would like to offer my sincere thanks to all of our staff; these remarkable individuals work with our clients in all stages of their lives, and are the “face” of the Winnifred Stewart Association.

I would also like to offer my personal thanks to my board. It has been my privilege to be president of this Association for the past two years, and having such a dedicated board with which to work for the past two years has been a delight. The past two years have brought a number of challenges, both to our organization and to me personally, and your professionalism, enthusiasm and personal commitment to the Association’s goals and objectives have made my job easier.

The Association has grown and adapted and evolved to meet the changing needs of our clients as well as to meet the changing environment within which we function. This ability to anticipate and adapt to change is perhaps our greatest strength.

*“Large streams from little fountains flow,  
tall oaks from little acorns grow.”*

– David Everett (1769 – 1813)

Catherine Whalley  
President

# ***Executive Director's Report***

We have been fortunate this year in many ways and for many reasons.

We continue to develop our services to meet the ongoing and changing needs of our clients. Particularly as people are aging, we find our services need to be flexible and responsive to each client on an individual basis, and I am very proud of how we have met these needs. Our services as a whole benefit from the experience we have gained over close to 50 years of service, and set the foundation for continued growth and development in the future.

Support from the community continues to be one of the Association's best assets and influences. Thank you to all of our donors, funders and sponsors who contribute to our programs. Together, we will continue to make a difference for the people we serve.

Thank you as well to our management team: Vicky Andress, Janet DeBeurs, Veronica Ferdinand, Grace Lommerts, Mary K Macdonald, Sheila Maher and Holly Walton. Their leadership and skills create an environment for our clients and employees that is second to none. I would like to congratulate Sandy Drybrough on her retirement this year from the Association, her dedication to the Association during her employment was admirable. Our administration team: Roxanne Dubé Coelho, Laurie Fitzgerald, Beverley Heath, and Susan Matthews also play a big role in supporting our programs.

I would like to thank our Board for their support. We rely on our board to make decisions that are in the best interest of the Association, and they have done an excellent job this year. It has been an honour to work with this dedicated group of volunteers.

Our greatest challenges continue to be in the areas of government funding. As cutbacks continued and tough decisions needed to be made, I am proud that we have not, in any way, sacrificed the quality of our services and can confidently say we will not do so in the future. The greatest strength of our organization is our ability to meet challenges with creative and innovative thinking. I can assure you that challenges presented in the future will be met with this same attitude and commitment.

With your support, we will continue to grow and develop, and create opportunities for our clients to be part of their community. Thank you all for our success.

Dennis Stockman  
Executive Director

# ***Programs and Services Report***

Fiscal issues have had a significant impact on our ability to undertake additional activities, such as the expansion of Residential Services to include a second assisted-living home. Fund raising continues in order to ensure this priority project is completed in the upcoming fiscal year.

All programs are currently working with a waiting list. The Service Coordination Committee continued to be active in reviewing 29 applications for service and supporting 20 individuals in making changes to the services provided to them in order to accommodate changing needs. The number of applications is lower than in previous years due to the waiting lists in the programs and cost containment measures implemented by PDD. In addition, the Committee tracks service completion and clients who are on extended leave of absence.

## ***Highlights:***

- We were saddened by the death of Linda Tookey. Staff were exceptional in providing support to Linda, her family and the clients in Residence 1. Clients were also wonderful in supporting each other.
- Hospitalization was necessary for many clients due to surgeries, illness, accidents, and increased health concerns. We are very fortunate to have Winnifred Stewart House, which enables people to return home, rather than have to go to sub acute care in another hospital or nursing home. Our staff continue to provide support to people in hospital whenever family members are unavailable.
- Summer 2001 was wonderful for people in Residential Services, who enjoyed spending time with their families, going to camp or going on one of the many trips. The variety of travel options included Vancouver, Banff, Jasper, Kelowna, & Drumheller. This summer in response to the reduction of funding and the cost of staff support on trips we have proposed some changes to the way that we offer trips. We remain committed to offering this valuable service but plan to do so in a way that offers cost effective trips in order that clients can assume the cost of staff support.
- Clients in the day programs also took advantage of the summer months to travel near and far to participate in community events. Groups went as far as Mundare, Vegreville, and Wetaskiwin to take in various sights and activities.



- Regular outings to local pools, festivals, sporting events, parks, and recreation centers continue with great enthusiasm. New sites have been added, and negotiations with other venues are in process.
- The Work Opportunities program donated products made by the clients to more than 20 events and organizations, helping others in the community.
- Clients volunteered in a number of positions at the World Championships in Track and Field, and were thrilled to be part of this historic event.
- The installation of a computer server system, thanks to a grant from the Edmonton Community Lottery Board, enabled all staff access to computers on a more regular basis. We saw an increase in communication across the Association with the use of e-mail, as well as an emphasis on developing client documentation to complement our staff's growing skills in using computers. Our clients benefited from additional adaptive technology, enabling more clients to communicate using touch screens and special keyboards.
- The Client Voice Committee and Together With Friends groups continued to provide social opportunities for clients, with BBQ's, entertainers and karaoke. The Client Voice Committee also took on the Winnifred Stewart Cookbook project, and produced 500 copies for sale to friends, families and community supporters.
- Training modules at Work Opportunities have been reviewed and revised, providing new and improved learning activities to develop employment and social skills. Clients continue to participate in Leadership Today- developing confidence in public speaking and self-advocacy.

## ***Achievements***

There have been some significant developments that have (both positively and negatively) impacted the Association's ability to meet the goals identified last year. PDD has been a major player in the past year and with the cutbacks some of our particular initiatives needed to be either deferred or completely re-thought because of financial restrictions.

Our board and management team have made a concentrated effort to ensure client services have not been affected. The greatest achievements this year are certainly due to the willingness of our staff to find creative solutions to meet client needs while being fiscally responsible.

### ***Highlights:***

- Since the development of the Winnifred Stewart Association Business Plan, there has been consistent progress in achieving and evaluating the goals that were originally set out, as well as development new initiatives and strategies in subsequent years. We have been fortunate to experience considerable success, which has driven the planning process year after year.
- The Planning Team has completed extensive research to develop recommendations related to the future of the Association's programs and services. These recommendations are highlighted on page 21.
- The Association adopted the trade name "Winnifred Stewart Association" at the annual Board Retreat. The end part of the legal name "for the Mentally Handicapped" has been removed from all documents other than those required by law. This change reflects the increased awareness of terminology used to describe people with disabilities. Awareness efforts will be focused on the Winnifred Stewart name and creating an image that is fitting with our current programs and services.
- Our 2001 direct mail campaign, "The Blitz" was the most successful mail campaign ever for the Association. Jack's story touched the hearts of hundreds of our supporters, whose generous contributions will be used to build our second assisted-living home.
- The Planned Giving Program was added to our fund raising services, enabling donors to have more options for supporting the Association. Promotional materials were developed that complement the Association's other printed and visual tools.

● We continue to review and change process where necessary in order to improve service. It is equally important to ensure that all staff receive information around the changes and are supported to implement the process changes. Some of the more significant changes to process were:

- ✓ Newly formatted relief lists
- ✓ Clearer process for shift changes and replacement staff.
- ✓ Computerized ledgers and increased accountability for client funds.
- ✓ Centralized timesheet review and relief staff accountability, orientation and evaluation.
- ✓ Centralized grocery budget tracking.
- ✓ Assessment process for monitoring clients who self-administer medication in the day programs.

● Our new wheelchair bus enabled more clients to access community venues and reduced the program's reliance on DATS, which in turned, freed up spaces for other DATS users in the community.



# ***Employees***

Our employees are a major contributor to the Association's success. The creativity, enthusiasm and dedication of our employees is unsurpassed. Employee turnover continues to be well below the provincial average and many positions are filled from employees making lateral moves or being successful in obtaining positions with greater responsibility.

The Association has continued the commitment to provide training to staff, however, in light of recent cutbacks the type and frequency of training is being evaluated. Mandatory training in First Aid, CPR, Medication Administration, Personal Profile, Abuse Protocol and Restrictive Procedures will continue, but other forms of training will be suspended until funding issues have been resolved. There are areas, however, where the needs of clients set the direction for training.

## ***Highlights:***

- Client health support needs have increased over this past year. Staff have received training in the areas of epilepsy, tube feeding, oxygen, arthritis, menopause, osteoporosis, back care and lifting. Some other areas identified by staff for future in service opportunities include death and grieving, sexuality, peri-care, bathing techniques and schizophrenia.
- Staff Appreciation held in May was received by all staff with great enthusiasm. Four employees received the Outstanding Employee award, and years of service awards were presented to 13 employees for a combined 120 years with WSA!
- All staff received introductory training to our new computer system, and will receive ongoing training on completing client documentation.
- The Back Care group has developed a training package for staff on use of the mechanical lifts, transfers and general back care information that is additional to the material in our Health and Safety policies and processes.
- A resource room continues to be developed, providing opportunity for staff to share information and have reference materials for various projects.
- The Recognizing Excellence program continues to be very popular, with 11,396 recognitions given, totaling 400,920 pts!



# ***Volunteers***

The goal of Volunteer Services is to enrich the services offered to clients, to support the Association staff, and to support the ongoing administrative work of the Association as a whole.

2001 was the International Year of Volunteers. In celebration of this event, a Wall of Fame was created on the main level of the main building representing several activities involving volunteers in our organization. A recognition event was also held, where several long-term volunteers received awards for their service.

## ***Highlights:***

- Volunteer Services continues to offer placements for community members within our programs, for our staff, for board and committee members and for administrative positions.
- Popular evening and weekend programs offered through Volunteer Services include three dinner and dances and soccer in the summer.
- A summer SEED student was hired to assist with Volunteer Services in the summer of 2001. Hendrika Jol completed a needs assessment in all programs that, coupled with the information from the environmental scan, provided the information required to determine the number and types of volunteer positions that are priorities in the Association.
- A strategic plan for Volunteer Services was developed and approved by the board. The plan incorporated the information gathered from the needs assessment and environmental scan. "Building the Future Today" outlines the direction of Volunteer Services for the next three years, providing opportunity for training and development within the Association to support an expanded volunteer program.
- Volunteers worked with the clients at the Work Opportunities program to create a Drama Club. Their first production, "A Christmas Carol", was presented in December and received rave reviews for the outstanding performances, set design and volunteer support.
- More than \$3,500 was raised by 40 volunteers who walked or ran in the Great Human Race.

## ***Overview of Volunteer Hours (2001-2002):***

● Board and Committees: (Board, Operating Committees, Service Coordination Committee)	506 hours
● Soccer (Coaches and Coordinators)	132 hours
● Fundraising activities (Auction, Great Human Race, Casino)	556 hours
● Dances (Volunteers and Coordinator)	320 hours
● Administration (Data entry, shredding, NewsFlash Editor, Administration Assistant)	356 hours
● Program/Client support	379 hours
● Special Projects: (Drama Club, Client Conference, History Book)	167 hours
● Practicum Students (7)	720 hours
<b>Total</b>	<b>3,136 hours</b>



## ***Partnerships***

The plan to develop community and corporate partnerships continues and specific strategies have been set out to create appropriate alliances. The Association and various staff continue as members in a number of organizations, to make connections in the community and increase awareness of trends in the field. Memberships are maintained in the following: Alberta Association of Rehabilitation Centres, Association of Fund Raising Professionals, Alberta Association of Fund Raising Executives, Inclusion Committee for the 2001 World Championships in Track and Field, Interagency Committee on Recreation for Persons with Special Needs, Programs for Adults with Multiple Disabilities, Mayfield Rotary, and Council of Service Providers.

### ***Highlights:***

- We have worked with the public and separate school divisions as part of the environmental scan to review the direction of future services. A great deal of information was gathered, and we look forward to continued cooperative efforts.
- Partnership with other agencies is also important. We have worked with the Good Samaritan Society, Goodwill Industries, Edmonton Community Services and other organizations to provide and obtain resource information and create opportunities for greater efficiencies in the future.
- The Recreation and Leisure Support Services program created a partnership with the Edmonton Art Gallery to offer clients a year-round class of art expression using the Art Gallery's facilities and instructor.
- Work Opportunities continued its partnership with NAIT. Our new wheelchair bus and the Work Opportunities truck were detailed with the Association's name and logo by the Graphic Sign Arts students and look wonderful.
- We have been working to develop a partnership with the Edmonton Oilers, which has so far resulted in the participation of Georges Laraque for our 2002 direct mail campaign. We look forward to further developments in this area in the upcoming year.
- Partnerships with community employment sites continue to be a great asset to the Work Opportunities program. The client benefit from learning new skills, and the employer benefits from having additional staff.



## ***Future Plans***

The Board has approved the development of a number of strategic initiatives to ensure a progressive and pro-active approach in dealing with new and emerging issues. Action plans will be developed by board members and staff, and will be implemented over the next year. The initiatives to be developed are:

- To have a human resource model that supports flexibility, diversity, and specialization in order to effectively support clients and the goals of the Association.
- To provide training opportunities to increase the skills & competencies of staff and volunteers to ensure quality services, consistency, and effective supports to all clients.
- To have a flexible and responsive service model that is based on a unified, proactive approach.
- To take more control of our own future by increasing self-sufficiency, sustainability, and reducing financial reliance on PDD.
- To attract and retain quality staff/volunteers by having an organizational culture and environment that is supportive of individual growth, well-being, and is rooted in value and respect.
- To develop mutually beneficial opportunities to increase our involvement in and contributions to the community.
- To have a clearly defined direction for the future based on the results of on-going research.
- To create a brand that will strengthen our presence and impact in the community.
- To influence public opinion and have a voice by actively campaigning on behalf of the community rehabilitation industry.
- To have transportation options that ensures access to services and activities in a convenient and efficient manner.
- To have multi-functional facilities that meet the needs of all individuals involved with and supported by the Winnifred Stewart Association.

# ***Financial Report***

## ***Funding:***

The Association has continued its working relationship with our primary funder, the Department of Community Development, Persons with Developmental Disabilities-Edmonton Regional Board (PDD). Over the past year budgets for clients receiving contract cluster or individualized funding have been revised to reflect a salary increase followed by the addition of direct and indirect costs per unit of service for the Recreation and Leisure Support Services Program. In addition, a 1% funding reduction in the fall of 2001 meant reworking budgets, re-clarifying expectations along with finding new and creative ways to be more efficient.

It is important to note that increases, decreases and/or changes made to the funding guidelines result in revising each client's budget under the contract cluster and individualized funding models. The completion of service agreements and annual funding renewals were ongoing tasks required by the department to ensure the continuation of funding for clients receiving either IF or cluster contract funding. This involved coordinating necessary documentation, reviewing information with guardians/families, and reviewing funding and staffing supports to ensure the budget reflected the client's circumstances residentially and/or vocationally. When necessary, annual reviews were completed for individuals receiving Assured Income for the Severely Handicapped throughout the department of Human Resources and Employment.

Funding for all programs is based in part upon the level of staffing support each client requires. The funding models in place at present are contract or block, Individualized Funding (IF) and contract cluster.

Under contract funding a service provider receives a specified amount of money to provide a set of services to a predetermined number of individuals. Funding is typically provided to the agency quarterly and in advance of services being delivered.

The purpose of the IF funding model is to provide direct funding to adults with a developmental disability and/or their families to purchase the services and supports the individual requires to live, work and participate in community life. Funding is negotiated and determined by a plan developed by the individual and their support network. A service provider is required to invoice after services are rendered.

Contract cluster funding is a blend of these two models. Funding remains individualized and portable should an individual choose to obtain service from another provider. Participation under this model is voluntary and an individual's needs and/or staffing support requirements are to be stable. Funding for all individuals in the cluster is provided to the service provider quarterly and in advance of services being rendered.

- Work Opportunities is funded through contract dollars. As of March 31, 2002, the program provided services to 82 clients, although throughout the year this number ranges anywhere from 82-85. Individuals may have left the program to pursue other interests, found employment and/or because the program was unable to provide the level of staffing supports they required. The number of clients receiving services is dependant upon factors such as their goals, interests, skills and staffing support requirements, the environment, available job sites, etc. For 2002-2003 Work Opportunities has contracted to provide services to approximately 85 clients.
  
- Recreation and Leisure Support Services is funded through IF and contract cluster funding. As of April 2001, the program provided services to 62 clients under the cluster contract and 20 under IF. Over the past year two new applicants were accepted into the program and three left service. By March 31, 2002 there were 59 clients under the contract cluster and 22 receiving IF. For the 2002-2003 contract year, the program will be providing services to 53 clients under the contract cluster and 28 under IF.
  
- Residential Services receives both IF and contract cluster funding. As of April 2001 the program had no vacancies and provided services to 45 clients under the contract cluster and one under IF. Once vacancy occurred during the year and was filled by an applicant on the waiting list. For the 2002-2003 contract year, Residential services will provide services to 46 clients under the contract cluster and one under the Individualized Funding model.

## ***Fund Raising:***

We had the most successful year to date at Sales & Promotions this fiscal year. Blue bag sales continue to be very good as well as our old “stand by” regular bags. The oversized industrial strength bags that we introduced two years ago have become a popular choice for our business customers.

Christmas wrap sales were not as strong this year, however the puzzle reindeer continue to be strong sellers around the Christmas season. Thank you to Work Opportunities for supplying us with reindeer again last season. This is a very important partnership!

Our direct mail campaign, “The Blitz”, was complimented this year with bus shelter ads across the city. The campaign was very successful, and brings the goal of building a second assisted-living home much closer.

With further reductions in funding from PDD, the Association must continue to seek out and enrich new and current funding sources in order to maintain the quality of our services. Proposals for funding are sent on an ongoing basis to foundations, funding programs and businesses to address identified needs. We continue to work on developing partnerships, such as the sponsorship committed by ATCO Gas.



The majority of our specialized equipment has been funded through the generosity of our supporters. This year, we were pleased to have received special project funding from Celanese Canada, Inc., the Edmonton Community Lottery Board, Allard Foundation, Melton Foundation, Knights of Columbus 12353 and the Kristie Charitable Foundation.

We also received significant funds in memory of Major John and Mrs. Louise Whalley and Mr. Roy Watson who were long-time supporters of the Association. Our thanks to everyone who made a donation in memory of a loved one this past year.

The Association would not be approaching its 50<sup>th</sup> Anniversary in 2003 without the support of the community. Thank you to all donors, sponsors and funders who have made the continued growth and inclusion of people with developmental disabilities possible through the Association. We invite all of our supporters to tour the Association at any time to see your gifts at work.