



Pathways

Abilities Society

70th ANNUAL REPORT 2022 - 2023

“SERVING OUR COMMUNITY SINCE 1953”

EMBRACE, EMPOWER, EMPLOY

THANK YOU!

PATHWAYS ABILITIES SOCIETY

MISSION STATEMENT

The mission of the Pathways Abilities Society is to assist people with disabilities to reach their individual goals and to participate and contribute as equal members of the community.

VISION STATEMENT

The vision of Pathways Abilities Society is of welcome... building communities that support and value the diverse-abilities of all people”.

VALUES STATEMENT

WE BELIEVE EACH PERSON:

- Has the right to equality, inclusion and belonging and is protected under the Canadian Charter of Rights and Freedoms.
- Is to be treated with dignity and respect.
- Has the right to be informed on all matters that affect their life and make their own choices and decisions.
- Has the right to speak for themselves (self-advocate) or to choose someone to speak for them.
- Has the right to be a valued and contributing member of the community at large and should be supported to learn the necessary skills to do so.
- Has the right to individualized service within the scope of what the society can provide.
- Has the right to access employment at equal pay for equal work.
- Has the right to expect that the society is accountable, advocates when requested or required and positively represents all people.
- Has the right to opportunities that provide lifelong learning and an enriched life.
- Has the right to a supportive network of personal relationships with family, friends and advocates.
- Has the right to privacy and confidentiality.
- Has the right to a standard of living adequate for good health and wellbeing including appropriate accommodations.
- Has the right to maintain their health and therefore is entitled to medical and dental care on a voluntary basis and is to be informed and give consent.
- Is entitled to aides or adaptations (something changed or added) that may contribute to greater independence.
- Is responsible for their own actions and is therefore responsible for the consequences.

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**PATHWAYS ABILITIES SOCIETY
MINUTES OF THE 69th ANNUAL GENERAL MEETING (AGM)
September 12, 2022 at 4:00 pm
123 Franklyn Rd, Kelowna, BC, V1X 6A9**

In attendance: Charisse Daley, Nick Pisio, Mark Reinelt, Chuck Hopkins, Cyndy Omand, Helen Phelan, Patricia Rantucci, Nick Pisio, Alaina Reiswig, Jock Craddock, Tiffany Conner, Karl Vollman, Terry Ginther and Madison Atwood.
By proxy, Chuck Hopkins was assigned Richard Pringle's vote.

1. Mark Reinelt called the meeting to order at 4:02 pm.
2. Mark Reinelt stated the notice of the meeting was sent 15 days prior to the AGM to the membership and we have a quorum as outlined in our bylaws to proceed with the meeting.
3. **Moved by Chuck Hopkins seconded by Jock Craddock that the agenda be approved as presented. Carried.**
4. **Moved by Karl Vollman seconded by Mark Reinelt to approve the minutes of the September 13, 2021 AGM. Carried.**
5. Patricia Rantucci introduced Madison Atwood from BDO. Madison stated she is a senior accountant from BDO Canada LLP here to represent Sinead Scanlon and Craig Folvik to present briefly on this year's audit. She stated Sinead apologizes for not being able to be here tonight. She stated they are happy to report that the audit went extremely well, and they issued an audit report, similar to prior years, with a clean audit opinion for Pathways. She stated Craig and Sinead presented the audited financial statements to the Board on June 6th, where they were approved. She stated at a very high level the major changes for the year are that total assets increased by \$730,000 and total liabilities decreased by \$190,000. She stated the current year's surplus is up \$200,000 from the prior year; overall showing a very strong financial position for Pathways. She stated Sinead and Craig would also like to extend appreciations to Rhonda and Charisse for their hard work during the audit process. She asked if there were any questions and there were none. **Moved by Patricia Rantucci seconded by Chuck Hopkins to accept the 2020/2021 audited financial statements as presented. Carried.**
6. **Moved by Patricia Rantucci seconded by Karl Vollman authorizing the Pathway's board of directors to appoint the auditors for the 2022-20223 fiscal year. Carried.**
7. Mark Reinelt read the President's report which was included in the AGM booklet.
8. Mark Reinelt introduced Tiffany Conner. Tiffany read her Self-Advocate's Report which was included in the AGM booklet.

Moved by Patricia Rantucci seconded by Jock Craddock to accept the Self-Advocate's Report as presented. Carried.

9. Mark Reinelt stated Patricia Rantucci will run the Election of the Officers this year. Patricia stated the terms of three Directors has concluded and three have agreed to allow their names to stand for re-election for a three-year term, Chuck Hopkins, Richard Pringle and Karl Vollman. Patricia stated Chuck and Richard are long-standing board members and their expertise and knowledge has been very valuable to the board and the organization. She stated Karl joined the society and board in February 2022. Karl was a Senior Facility Manager with over seventeen years of experience. He had diverse commercial portfolios including management, administration and staff supervision. His areas of expertise are Facility and Property Management, Project Management, Cost Controlling, Budget Preparation, Contract Negotiations, Vendor Relationships, Team Leadership and Development, Mentoring, Organizational Development, Strategic Planning, Leasing Analysis, Policy and Procedure development and Financial Analysis. Patricia asked if there were any questions. There were none. **Moved by Patricia Rantucci seconded by Mark Reinelt to appoint Chuck Hopkins, Richard Pringle and Karl Vollman to the Pathway's board of directors for a three-year term. Carried.**

10. Mark Reinelt adjourned the meeting at 4:13 pm.

*President's
Report*

PRESIDENT'S REPORT

2022-2023

It is my honour to present to you the Annual Board President's Report, highlighting the significant achievements and milestones of Pathways Abilities Society in the past year. With unwavering dedication and collective efforts, Pathways has not only accomplished our goals but also reached new heights in our mission to serve and empower individuals with diverse abilities.

Hadgraft Wilson Place - Grand Opening

One of the most remarkable events of the year was the grand opening of Hadgraft Wilson Place. 68 homes were created for the people of Kelowna, who otherwise may not be able to afford to live here. The Grand Opening, attended by the Minister of Housing as well as the Mayor of Kelowna was a very well attended event featuring words from the namesake families as well as one of the people that call Hadgraft Wilson Place home.

Recommendation Free CARF Report - A Testament to Quality

In the pursuit of excellence and adherence to industry best practices, Pathways Abilities Society obtained a recommendation-free CARF report this year. The Commission on Accreditation of Rehabilitation Facilities (CARF) review is a rigorous process that assesses the quality of services and adherence to the highest standards of care. Achieving a recommendation-free report reflects the dedication of our staff and leadership who consistently go above and beyond to ensure the well-being and growth of our members. This recognition is a testament to our unwavering commitment to maintaining the highest level of service excellence.

Celebrating 70 Years of Empowerment

This year marks a significant milestone for Pathways Abilities Society as we celebrate our 70th anniversary. Throughout these seven decades, our organization has continually evolved to address the changing needs of our community members. From humble beginnings to a comprehensive support network, Pathways Abilities Society has grown into a beacon of hope and opportunity for individuals with diverse abilities. We honor the legacy of our founders and acknowledge the dedication of all those who have contributed to our success over the years.

Acknowledgments and Gratitude

None of our accomplishments would have been possible without the hard work, dedication, and passion of our staff, volunteers, board members, and community partners. Your unwavering support and commitment are the driving force behind our continued success, and we extend our deepest gratitude to each one of you.

Looking Ahead

As we embark on another year of service, we are excited about the possibilities and opportunities that lie ahead. With your continued support, we will strive to expand our

programs, reach more individuals in need, and create a more inclusive and compassionate society for everyone.

In conclusion, I am immensely proud of what we have achieved as a society this year. Our commitment to embrace, empower and employ has brought about positive change in the lives of countless individuals and families we serve. As we look forward to the future, let us embrace the challenges and opportunities with the same spirit that has defined Pathways Abilities Society for the past 70 years.

Thank you all for being an integral part of our journey. Together, we will continue to make a difference.

Sincerely, Mark Reinelt, Board President, Pathways Abilities Society

*Secretary Treasurer's
Report*

SECRETARY TREASURER'S REPORT

2022-2023

It is my pleasure to submit this years' Secretary Treasurer's Report for Pathways Abilities Society for the year ended March 31, 2023.

The board monitored the society's financial position through-out the fiscal year through monthly financial reports and statements, comparing budget to actuals. This year we were happy to see a rebound as we continue to work through the global economic impacts and what now feels like a distant memory of the COVID 19 pandemic.

This past fiscal year we commenced a new collective agreement with our valuable staff, we continued to see healthy revenues through our Bottle Depot donations and Bikeways sales. Costs in general were increases such as wages and interest rates, but we successfully managed to end the year with \$149,861 in revenue.

Over the course of our fiscal year we were so very happy provide services and joyful activities, similar to how we did pre pandemic. As we enter 2023 we could see the finish line for our new Hadgraft Wilson Place which provides affordable housing, for which we held our grand opening in June of 2023! We also welcomed our 70th Anniversary! What an incredible milestone and achievement! I'm so excited to see how the Society will grow and celebrate these two achievements for our 2023-2024 fiscal year.

I am so very grateful to be part of this remarkable society and I accredit its many successes to our dedicated staff and volunteers; in particular Charisse Daley (Executive Director) and Rhonda Campbell (Finance Manager). Thank you for ensuring that Pathways Abilities Society remains in compliance and continues to provide many essential services.

Respectfully submitted by Patricia Rantucci, Secretary Treasurer

*Auditor's
Report*

Pathways Abilities Society
Financial Statements
For the Year Ended March 31, 2023

Pathways Abilities Society
Financial Statements
For the Year Ended March 31, 2023

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Independent Auditor's Report

To the Members of Pathways Abilities Society

Qualified Opinion

We have audited the financial statements of Pathways Abilities Society (the "Society"), which comprise the statement of financial position as at March 31, 2023, the statements of operations, changes in net assets and cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies.

In our opinion, except for the possible effects of the matter described in the Basis for Qualified Opinion section of our report, the accompanying financial statements present fairly, in all material respects, the financial position of the Society as at March 31, 2023, and its results of operations and cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

Basis for Qualified Opinion

In common with many not-for-profit organizations, the Society derives revenue from donations, the completeness of which is not susceptible to satisfactory audit verification. Accordingly, verification of these revenues was limited to the amounts recorded in the records of the Society. Therefore, we were not able to determine whether any adjustments might be necessary to donation revenue, excess of revenues over expenses, and cash flows from operations for the years ended March 31, 2023 and 2022, current assets as at March 31, 2023 and 2022, and net assets as at April 1 and March 31 for both the 2023 and 2022 years. Our audit opinion on the financial statements for the year ended March 31, 2023 was modified accordingly because of the possible effects of this limitation in scope.

We conducted our audit in accordance with Canadian generally accepted auditing standards. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Statements* section of our report. We are independent of the Society in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation and fair presentation of the 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.



In preparing the financial statements, management is responsible for assessing the Society's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Society or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Society's financial reporting process.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Canadian generally accepted auditing standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with Canadian generally accepted auditing standards, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit 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 Society's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Society's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Society to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.



We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

Report on Other Legal and Regulatory Requirements

As required by the Societies Act (British Columbia), we report that, in our opinion, the accounting principles in Canadian accounting standards for not-for-profit organizations have been applied on a basis consistent with that of the preceding year.

Chartered Professional Accountants

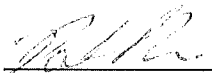
Kelowna, British Columbia
July 10, 2023

Pathways Abilities Society Statement of Financial Position

March 31	2023	2022
Assets		
Current		
Cash (Note 2)	\$ 2,246,603	\$ 2,356,911
Temporary investments	248,539	271,126
Accounts receivable	382,402	27,328
Prepaid expenses	34,599	29,362
	<u>2,912,143</u>	<u>2,684,727</u>
Property and equipment (Note 3)	5,243,608	5,317,140
	<u>\$ 8,155,751</u>	<u>\$ 8,001,867</u>
Liabilities		
Current		
Accounts payable and accrued liabilities (Note 4)	\$ 1,338,244	\$ 1,205,591
Current portion of long term debt (Note 5)	84,156	105,437
	<u>1,422,400</u>	<u>1,311,028</u>
Long term debt (Note 5)	1,704,054	1,811,403
	<u>3,126,454</u>	<u>3,122,431</u>
Net Assets		
Investment in property and equipment	3,460,287	3,405,188
Internally restricted (Note 6)	70,216	70,216
Externally restricted (Note 6)	626	626
Rental assistance surplus (Note 7)	94,474	103,552
Unrestricted net assets	1,403,694	1,299,854
	<u>5,029,297</u>	<u>4,879,436</u>
	<u>\$ 8,155,751</u>	<u>\$ 8,001,867</u>

On behalf of the Board:

 Director

 Director

Pathways Abilities Society
Statement of Changes in Net Assets

	Invested in Property and Equipment	Internally Restricted	Externally Restricted	Rental Assistance Surplus	Unrestricted	2023 Total	2022 Total
For the year ended March 31							
Balance, beginning of the year	\$ 3,405,188	\$ 70,216	\$ 626	\$ 103,552	\$ 1,299,854	\$ 4,879,436	\$ 3,959,102
Excess (deficiency) of revenues over expenses	(82,508)	-	-	(9,078)	241,447	149,861	920,334
Mortgage principal repayments	128,630	-	-	-	(128,630)	-	-
Purchase of property and equipment	8,977	-	-	-	(8,977)	-	-
Balance, end of the year	\$ 3,460,287	\$ 70,216	\$ 626	\$ 94,474	\$ 1,403,694	\$ 5,029,297	\$ 4,879,436

The accompanying notes are an integral part of these financial statements.

Pathways Abilities Society Statement of Operations

For the year ended March 31	2023	2022
Revenue		
Community Living BC	\$ 6,948,810	\$ 6,336,661
Fundraising	74,976	129,412
Sales of service	497,325	537,307
Tenant rent contributions	147,610	143,411
Individual funding	135,047	143,775
Subsidies and grants	150,578	285,251
Other revenue	10,890	40,162
	<u>7,965,236</u>	<u>7,615,979</u>
Expenses		
Board and society expenses	10,580	5,209
Contracted services	1,306,491	1,120,699
Employee development	28,339	21,809
Food	69,736	52,995
Grants	-	140,860
Insurance	34,558	27,710
Interest on long term debt	102,458	93,172
Office expenses	79,427	62,686
Professional fees	17,932	19,437
Program expenses	36,632	23,461
Property taxes	17,225	15,594
Rent	194,234	186,398
Repairs and maintenance	181,002	131,468
Supplies	24,132	24,968
Telephone	28,082	22,256
Transportation	105,653	86,685
Utilities	54,934	52,237
Wages and benefits	5,424,197	4,518,515
	<u>7,715,612</u>	<u>6,606,159</u>
Excess of revenues over expenses before other items	<u>\$ 249,624</u>	<u>\$ 1,009,820</u>
Other Items		
Amortization	(82,508)	(89,486)
Gain (loss) on investments	(17,255)	-
	<u>(99,763)</u>	<u>(89,486)</u>
Excess of revenues over expenses	<u>\$ 149,861</u>	<u>\$ 920,334</u>

The accompanying notes are an integral part of these financial statements.

Pathways Abilities Society Statement of Cash Flows

For the year ended March 31	2023	2022
Cash flows from operating activities		
Cash receipts from core operating grants and activities	\$ 7,603,605	\$ 7,557,878
Cash paid to suppliers and employees	(7,485,736)	(6,540,715)
Interest paid	(102,458)	(93,172)
	<u>15,411</u>	<u>923,991</u>
Cash flows from investing activities		
Proceeds on disposal of investments	11,889	-
Acquisition of property and equipment	(8,978)	(128,053)
	<u></u>	<u></u>
Cash flows from financing activities		
Repayment of long-term debt	(128,630)	(183,723)
	<u></u>	<u></u>
Net (decrease) increase in cash	(110,308)	612,215
Cash, beginning of the year	<u>2,356,911</u>	<u>1,744,696</u>
Cash, end of the year	<u>\$ 2,246,603</u>	<u>\$ 2,356,911</u>

The accompanying notes are an integral part of these financial statements.

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

1. Significant accounting policies

Nature of Business	The Pathways Abilities Society (the "Society") is incorporated under the laws of the Society Act of British Columbia as a not-for-profit organization and is a registered charity under the Income Tax Act. The Society provides service and support to people with developmental disabilities.
Basis of Accounting	The financial statements have been prepared using Canadian accounting standards for not-for-profit organizations.
Fund Accounting	The Society follows the restricted fund method of accounting. Accordingly, resources are classified for accounting and financial reporting purposes into funds. These funds are maintained in accordance with either the objectives specified by the donors or with the directives issued by the Board of Directors. Certain interfund transfers may be necessary to ensure the appropriate allocation of assets and liabilities to the respective funds.
Cash and Cash Equivalents	Cash and cash equivalents include short-term notes to maturity of one year or less at the date of acquisition.
Temporary Investments	Investments include all common shares, convertible securities, bonds, debentures, mortgages and real estate investments. These investments are recorded at their fair values determined, on a trade date basis, on the last day of business of the fiscal period.

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

1. Significant accounting policies (continued)

Revenue Recognition The Society follows the restricted fund method of accounting for contributions. Operating grants are recorded as revenue in the period to which they relate. Grants approved but not received at the end of the accounting period are accrued. When a portion of the grant relates to a future period, it is deferred and recognized in the subsequent period.

Contributions are recognized as revenue in the year they are received or become receivable if the amount to be received can be reasonably estimated and collection is reasonably assured.

Revenue from user fees, rentals, vocational program, and sales of products and services is recognized when the services are provided or the goods sold.

In the normal course of operations, the Society may receive notice of an impending gift. Gifts, including bequests are recorded upon receipt of the donated asset. Pledges are not included in revenues until the funds are received. Gifts in a form other than cash or marketable securities are recorded at fair value at the time of receipt.

Interest on bonds, mortgages, and short-term notes are recorded on an accrual basis. Dividends that have been declared are recorded as income on the date of record set for the dividend. Investment income earned on restricted funds is recognized as revenue of the applicable restricted fund in accordance with the terms of the restricted contribution.

Contributed Services A substantial number of volunteers contribute a significant amount of their time each year. Because of the difficulty of determining the fair value, contributed services are not recognized in the financial statements.

Property and Equipment Property and equipment is recorded at cost. Contributed property and equipment is recorded at fair value at date of contribution. Assets are amortized over their estimated useful lives and management has estimated the useful lives as follows:

	Method	Rate
Buildings	Straight-line	50 years
Furniture and fixtures	Straight-line	10 years
Asphalt and parking areas	Straight-line	10 years
Automotive equipment	Straight-line	10 years

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

1. Significant accounting policies (continued)

Use of estimates

The preparation of financial statements in accordance with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from management's best estimates as additional information becomes available in the future.

Management has provided an estimate on the Society's sick pay accrual. The Society's employees are provided with sick leave on the basis of 1 day per month to the maximum of 156 days per employee. Sick benefits are not paid out upon termination and any unpaid amounts revert to the Society. Accumulated sick leave can be carried over into succeeding years. The amount of sick pay that has been accrued and is included in accounts payable for the current year is based upon managements' best estimate based upon past performance.

Financial Instruments

Financial instruments are recorded at fair value when acquired or issued. In subsequent periods, financial instruments are reported either at cost or amortized cost less impairment when changes in circumstances indicate the asset could be impaired. Transaction costs on the acquisition, sale or issue of financial instruments are charged to the financial instrument.

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

2. Cash

	2023	2022
Restricted cash	\$ 341	\$ 414
Unrestricted cash	2,246,262	2,356,497
	<u>\$ 2,246,603</u>	<u>\$ 2,356,911</u>

3. Property and equipment

	2023		2022	
	Cost	Accumulated Amortization	Cost	Accumulated Amortization
Land	\$ 2,800,087	\$ -	\$ 2,800,087	\$ -
Buildings	2,908,870	602,190	2,908,870	548,711
Furniture and fixtures	331,566	320,419	322,589	319,930
Automotive equipment	449,978	324,284	449,978	295,743
	<u>6,490,501</u>	<u>1,246,893</u>	<u>6,481,524</u>	<u>1,164,384</u>
	<u>\$ 5,243,608</u>		<u>\$ 5,317,140</u>	

4. Accounts payable and accrued liabilities

The Society's employees are provided with sick leave on the basis of 1 day per month up to a maximum of 156 days per employee. The estimated total liability for sick pay is \$351,871 (2022 - \$337,070). As at March 31, 2023, \$327,714 (2022 - \$327,714) was accrued and is included in accounts payable and accrued liabilities.

Included in accounts payable and accrued liabilities are government remittances payable of \$34,632 (2022 - \$26,416).

The collective agreement for The Society's union expired in 2022. Subsequent to year-end, the new collective agreement has been signed and ratified. Under the new agreement and its ratifications, all employees who earned income during the year ended March 31, 2023 are owed retroactive wage increases dating back to April 1, 2022. The Society estimates the total liability to its employees to be \$350,000, which has been included in accounts payable and accrued liabilities for the year end. The total costs will be funded through Community Living BC and have been included in accounts receivable for the year end.

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

5. Long term debt

	2023	2022
Interior Savings Credit Union mortgage repayable in monthly instalments of \$2,928, including interest at 4.93% per annum, due for renewal January 1, 2024 secured by the underlying assets at 123 Franklyn Road.	\$ 358,170	\$ 375,369
Interior Savings Credit Union mortgage repayable in monthly instalments of \$1,903, including interest at 4.70% per annum, due for renewal September 1, 2023 secured by land and buildings at 2835 and 2837 Bouvette Street.	221,156	284,269
Interior Savings Credit Union mortgage repayable in monthly instalments of \$2,874, including interest at 4.75% per annum, due for renewal June 2, 2023 secured by land and buildings at 2476 Main Street, West Kelowna.	268,796	283,539
Interior Savings Credit Union mortgage repayable in monthly instalments of \$2,874, including interest at 4.75% per annum, due for renewal June 2, 2023 secured by land and buildings at 1216 St. Paul Street.	188,373	213,355
CIBC mortgage repayable in monthly instalments of \$4,619, including interest at 3.95% per annum, maturing September 29, 2040 secured by land and buildings at 1250 Guisachan Road and 647 Old Meadows Road.	751,715	760,308
	1,788,210	1,916,840
Less current portion	84,156	105,437
Long term portion	<u>\$ 1,704,054</u>	<u>\$ 1,811,403</u>

Estimated principal repayments required on long term debt for the next five years and thereafter are due as follows:

2024	\$ 84,156
2025	88,408
2026	92,877
2027	97,574
2028	102,511
Thereafter	1,322,684
	<u>\$ 1,788,210</u>

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

6. Restricted funds

Included in the net assets of the Society are restricted reserves in a society fund and a building fund. There have been no changes to these reserve totals for the current year or the prior year.

7. Rental assistance surplus

The Rental Assistance Program is funded by the British Columbia Mortgage and Housing Corporation. The Society is required to segregate the operating surplus under this program from the surplus of other programs.

Subsidies for low income housing are reviewed on an annual basis by the British Columbia Housing Management Commission. Resulting adjustments are relating to the prior period and as such, are recorded as a change in net assets.

8. Economic dependence

The Society is funded primarily by the Province of British Columbia through budget arrangements established by Community Living British Columbia ("CLBC"). Funding from CLBC represents 89% (2022 - 86%) of the Society's total revenue for the year.

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

9. Commitments and contingencies

- a) The Society signed a 60 year premises lease agreement with the City of Kelowna on May 02, 2023, with an annual lease payment of \$10.
- b) The Society and its employees contribute to the Municipal Pension Plan (a jointly trustee pension plan). The board of trustees, representing plan members and employers, is responsible for administering the plan, including investment of assets and administration of benefits. The plan is a multi-employer defined benefit pension plan. Basic pension benefits are based on a formula. As at December 31, 2021, the plan has about 206,000 active members and approximately 110,000 retired members.

Every three years, an actuarial valuation is performed to assess the financial position of the plan and adequacy of plan funding. The actuary determines an appropriate combined employer and member contribution rate to fund the plan. The actuary's calculated contribution rate is based on the entry-age normal cost method, which produces the long-term rate of member and employer contributions sufficient to provide benefits for average future entrants to the plan. This rate may be adjusted for the amortization of any actuarial funding surplus and will be adjusted for the amortization of any unfunded actuarial liability.

The most recent actuarial valuation for the Municipal Pension Plan as at December 31, 2021, indicated a \$3.761 million funding surplus for basic pension benefits on a going concern basis.

The Society paid \$254,270 (2022 - \$236,696) for employer contributions to the Plan. The next valuation will be as at December 31, 2024, with results available in 2025. Employers participating in the plan record their pension expense as the amount of employer contributions made during the fiscal year (defined contribution pension plan accounting). This is because the plan records accrued liabilities and accrued assets for the plan in aggregate, resulting in no consistent and reliable basis for allocating the obligation, assets and cost to individual employers participating in the plan.

Pathways Abilities Society Notes to Financial Statements

March 31, 2023

10. Financial instruments

Interest rate risk

Interest rate risk is the risk that the fair value or future cash flows of a financial instrument will fluctuate because of changes in market interest rates. The Society is exposed to interest rate risk primarily through changes in interest rates on its long term debt, but also through the interest earned on its GIC's which have a fixed interest rate, and cash which accrues nominal interest.

Credit risk

Credit risk is the risk that one party to a financial instrument will cause a financial loss for the other party by failing to discharge an obligation. The Society is exposed to credit risk resulting from the possibility that a party to a financial instrument defaults on their financial obligations; if there is a concentration of transactions carried out with the same counterparty; or of financial obligations which have similar economic characteristics such that they could be similarly affected by changes in economic conditions. The Society's financial instruments that are exposed to concentrations of credit risk relate primarily to the trade accounts receivable from companies to which services are provided.

Liquidity risk

Liquidity risk is the risk that the Society encounters difficulty in meeting its obligations associated with financial liabilities. Liquidity risk includes the risk that, as a result of operational liquidity requirements, the Society will not have sufficient funds to settle a transaction on the due date; will be forced to sell financial assets at a value, which is less than what they are worth; or may be unable to settle or recover a financial asset. Liquidity risk arises from accounts payable and accrued liabilities.

Management has determined that the Society is not significantly exposed to credit and liquidity risks arising from these financial instruments. There have been no changes from the previous year of policies, procedures and methods to measure the risk.

11. BC Society Act disclosure

The Societies Act (British Columbia) requires certain information be reported in regards to remuneration of employees, contractors and directors. Included in wages and benefits are two (2022 - one) employees with remuneration over \$75,000. No honoraria were paid to members of the Board of Directors for the current year or the prior year.

12. Comparative figures

Certain comparative figures have been reclassified to conform to the current year's presentation.

Self-Advocate's
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SELF-ADVOCATE'S REPORT

2022-2023

Tiffany Conner has been serving as our Self-Advocate liaison for the 2022/2023 calendar year. Tiffany has been dedicated to promoting individual safety and creating safe spaces for the people we serve to address their concerns, learn, and discuss their rights and responsibilities.

Due to the ongoing focus on individual safety, this year's self-advocate meetings have been centered on crucial topics such as "How to Stay Safe Online," "Nine Types of Violence and Abuse," "Rights and Responsibility," and "Sun/Summer Safety." These issues have garnered considerable attention from the attendees.

This year, we have been able to hold in-person self-advocate gatherings bi-weekly in our auditorium. The attendance and engagement have been encouraging, with participants actively contributing to discussions about their rights and responsibilities.

Tiffany and the Pathways staff have collaborated to create informative and engaging presentations. This approach has resonated well with the attendees, ensuring a more interactive and enriching experience.

Last year, there were concerns that some attendees lacked understanding when discussing the monthly questions, particularly regarding fair treatment and consideration of their rights at Pathways. In response to this, Tiffany has continued to deliver these meetings in a more straightforward and easily comprehensible manner to improve awareness among the participants.

Our goal is to foster open dialogue, mutual respect, and active participation in shaping the services provided at Pathways. The bi-weekly schedule has proved to be conducive to achieving this objective, and we are optimistic about its continuation.

Respectfully submitted by Tiffany Conner, Self-Advocate Liaison and Ryan Boychuk and Joanna Wittke, Activity Services Supervisors

Service

Reports

SERVICES REPORT

2022 - 2023

Employment

During the past year Integrated Career Opportunities (ICO) has actively supported individuals working in community and social ventures. New referrals have been received and new discovery sessions are on-going, which will once again include workplace assessments. Most recently, new customized positions were secured at Costco and Delta Grand.



Pathways employment partner's are as follows, BC Growers Group, Fenders Auto body, Kelowna Walmart, Clippendale's Luxury Grooming, Capital News, Protec Powder

Coaters, Century 21 Assurance Realty Ltd, Choices Market, David and Marie Brown, Delta Grand Okanagan Resort, Freddy's Brew Pub, Home Depot Kelowna, Kelowna Curling Club, OK Tire, Grand 10 Theatre, Real Canadian Superstore, Tim Hortons, OK Tire, Guisachan Family Medical Clinic, Eldorado Hotel, H2O Center, UBCO Pritchard Dining Hall, VRS Communities, Winners Kelowna, Planet Earth and Costco.

Social Ventures contracts continue. UBCO has renewed their regular service weekly schedule and the College has renewed services one day weekly.

BikeWays, continues to operate Monday to Friday.

Community recycle continues to receive many donations of refundable cans and bottles from community. The ICO team along with community recycle continue to provide bottle pick ups in Sonoma Pines, Glen Meadows, Sandalwood Regency, Legacy Two and Westwood retirement communities once per month. The Kelowna Yacht Club also donates their products during the summer months twice weekly. These donations have truly contributed to a positive impact on the revenue received within the recycle program.

Pathways social enterprise partners are Boston Pizza Dilworth, City of Kelowna, Columbia Bottle Depot, Kelowna Kia and 4 Less Disposal and Kelowna Landfill.

Sadly, we continue to deal with on-going occurrences of yard camping and vandalism at our 1216 S.t Paul Street location.

Thanks to the amazing teamwork of the support staff working out of St. Paul and Kent Road sorting depot, we continue to provide support where and when needed in all employment areas.

Volunteering

During the past year, the volunteer area of Pathways has been active in BikeWays with a regular group of four volunteers coming into the bike shop weekly to assist with re-furbishing bikes.



Nick



Rick and Ian



Kendra

We welcomed ten new volunteers in 2023. We continue to focus on increasing volunteerism and provide new opportunities for social interaction to individuals who are living in one of the Pathways homes or perhaps a home share. We are also adding to the volunteers available to assist with Social Recreation Activities.

Submitted by Bonnie Fraser, Employment Manager

The Homes

As the society continues to grow and expand, change is inevitable, and the homes saw many changes in the last year. Nevertheless, we continue to support the home members to make sure that they are living a productive and enriching life no matter the circumstances.

The first significant change was Laura McKinnon was leaving the Home Supervisor position in August 2022 and Alaina Reiswig was appointed into that role. Then Joanna Wittke was appointed as the permanent Senior Support Worker at Bouvette which was the natural choice as she had been filling in as a temporary Senior Support Worker since May of 2022. To keep with our theme of change, at the end of the 2022 year, Joanna was then appointed to the Activity Service Supervisor role and Conner Gibbs then took over as the Senior Support Worker at Bouvette.

Many home members struggled with different medical needs this year including multiple different surgery procedures, a knee replacement and pneumonia. Four out of five people at one home lost their family doctor due to the doctor losing his medical license. So far, 1 person has been accepted by a new doctor and we continue to seek new doctors for the other three people.



On Wednesday, March 1, 2023, a home member from New Meadows, Trecey Anderson, was transported to Kelowna General Hospital via ambulance due to a suspected seizure, where she was admitted and it was confirmed by three different doctors on Friday March 3, 2023, that she was palliative. Not even a week later, on Tuesday March 7, 2023, at 11:34 pm Trecey passed away. Trecey had been a participant of Pathways for 37 years, since 1985. Trecey was a part of the Activity Services for many years. In early, 2021 Trecey moved into New Meadows and has spent the last few years there. Trecey was the life of the party and loved celebrating her birthday. Everyone knew that Trecey's birthday was March 31 as she celebrated her birthday for the

whole month of March. Trecey has been deeply missed by everyone who had the pleasure of being in her life.

New Meadows had a new home member, Brenda, move in on Monday, April 3, 2023. We are continuing to get to know Brenda. The adjustment has taken a little while however she seems to be settling in and embracing her new home.

We continue to participate in different community activities and try to take advantage of all that Kelowna has to offer.

We ended last summer with home members taking part in different music events such as "Music in the Park" and one of the men from the Guisachan home went to the Rock the Lake concert at Prospera Place. Two of the men from Guisachan enjoyed a lunch and beach cruise on a Kelowna Cruises houseboat to which they are still talking about a year later! New Meadows home members utilized the Capital News Centre and the walking track all year round. Where Bouvette has been actively joining the different Social Recreation activities such as Community breakfasts and different sporting events. All three homes came and celebrated 70 years of service at Pathways annual summer BBQ on June 9, 2023.



Travelling continues to be a thrilling experience for some of our home members and we were lucky enough to join the travel club multiple times this year. Four different home members all travelled to Mexico in November 2022. One gentleman joined the travel club yet again in May 2023 and went to Disneyland with the group. Camp Owassi was attended for the weeklong duration by 4 home members. Whereas some of the other home members chose to only go to Camp for day visits. I'm positive that Camp Owassi will be as enjoyed again this August by the home members that attend.



Home members were able to do some vacations this June 2023, independent of the travel club, and were able to travel within the Okanagan and Kootenay region. Two people went and experienced two nights away at the Walnut Beach Resort in Osoyoos B.C. While two of the others went for two nights to the Prestige Inn in Nelson, B.C. where they spent some time relaxing at Ainsworth Hot Springs resort. Two men spend their two-night vacation camping at Agur Lake Cabins in Summerland B.C.

As we gear up for the summer of 2023 all three homes have dates for their summer family and friends get togethers which we are looking forward to spending some time with home members family members and visiting with the people that are most important to them.

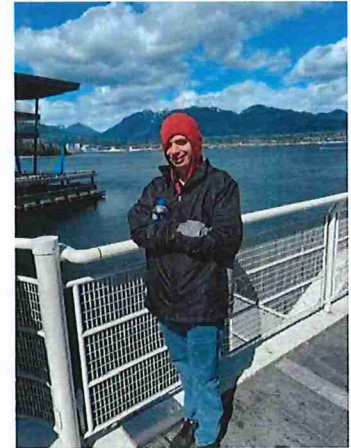
Respectfully Submitted: Alaina Reiswig, Homes Supervisor

Social Recreation

Our evening and weekend services have been strong since I took over the social recreation support worker role at Pathways.

We currently have 111 individuals that sign up for social recreation and about 39 people that come out regularly to events. It varies depending on the season and the individual's schedules.

New individuals have been signing up, which is always a positive! Pathways Abilities Society's social recreation provides around three activities per week along with two weekends per month as well. Social recreation provides approximately 140 services a year.



Some of the more popular services that are provided would include Kelowna Rockets, Dinner and Movie, Okanagan Sun, Bowling, Elvis Festival, Tickleberries, Kangaroo Creek farm, and Parks Alive, and that's just naming a few.

Social recreation hopes to grow in more outdoor services such as hikes, picnics, parks and will achieve this through sign up. However, in the past year, people have not shown an interest in these services, but I nonetheless will look to have better sign up moving forward.

The addition of a community breakfast/ dinner social has quickly become a favorite activity. Social recreation has tried to add more indigenous activities as well which originally had a slow start but have been attended as of late. The individuals that attended were entertained, happy, and had an overall a good time.

Attendance has shown that the social recreation services provided have been very well received. People always seem excited for what is next and enjoy each other. I have also used my time to take individuals from our houses out in community and these individuals also attended social recreation services as well.



This year social recreation has done two travel trips, both to Vancouver B.C. One was for a Vancouver Canucks hockey game and to visit Science World and the other was for another Canucks game and Rugby. Those trips have been responded to well, by the individuals that went on those trips, as they always ask when the next one will be!

Social Recreation is planning a longer trip to Seattle in September. Also, a fishing trip is a goal coming after summer. Volunteers have been scarce, but Sarah Konkin has been the one steady volunteer and the individuals have responded really well to her!

Submitted by Martin Courtney, Social Recreation Coordinator

Activity Services

Over the past year, Activity Services has continued to provide meaningful and productive activities that enable people to participate actively in their community. Several volunteer placements, previously put on hold due to COVID, have been reinstated.

As the number of aging participants increases, our scheduling committee has worked diligently to implement new and meaningful activities for our in-house groups. From interactive reading and storytelling groups to art and music therapy, we are delighted to offer a diverse range of activities that cater to all.

A new service model was introduced in the spring/summer, shifting our focus to a more person-centered approach rather than just being activity-centered. Now, individuals are grouped with their peers with similar goals and interests, spending the entire day together. They actively participate in building the group's curriculums, emphasizing personal goals and community involvement. This shift has resulted in improved



participation and engagement, ensuring activities remain fresh and relevant. Moreover, it fosters valuable life skills, such as teamwork, problem-solving, and adaptability, which will benefit our individuals in their everyday lives.

The implementation of all-day groups has allowed individuals and staff to build stronger relationships and work on skill development, without the rush to return to the building for lunch or group transitions. As a result, our groups now spend the full day in the community, enhancing their overall experience.

Throughout the winter of 2022/2023, Activity Services witnessed several changes in our leadership team. With movement in the senior support roles and new supervisors, the overall atmosphere of the building has transformed positively. Feedback from both individuals and staff has been favorable, as they warmly welcomed ongoing changes and new ideas.

Attendance rates have shown steady growth, and we often operate at full capacity with a waitlist—a remarkable achievement not seen in years. Consequently, we have expanded our support staff by hiring over nine new employees in the past few months. Our senior supports are dedicated to ensuring everyone is well-oriented and prepared to cover shifts this summer. We eagerly look forward to having fresh faces contributing to our services throughout the upcoming year.



On April 22, 2023, Activity Services and the leadership team actively participated in an Agency-wide Earth Day cleanup. Throughout the day, everyone contributed to the community cleanup around Kelowna. Groups worked tirelessly to clean the roads near the Pathways Activity Service building, including Franklyn Road, Hwy 33, and McCurdy, while others focused on stream cleanup for the Adopt a Stream program.



Activity Service Volunteerism



Activity Services engages in volunteering at seventeen different placements, with fourteen in the community and three done in-house at Pathways. We recently acquired new placements at Helen's Acres and resumed service with Mountain View Village, the Salvation Army food bank, and Gifts for Grandmas. Our pursuit of new placements in the community is ongoing, and we have exciting prospects for the upcoming year.

Activity Service Employment

Our West Kelowna Activity Services has embraced new and exciting opportunities. With the support of activity service staff and in collaboration with Telus, three individuals are now actively employed. Additionally, two individuals are currently employed at our Rutland location—one in janitorial work and the other at the front desk. Furthermore, two individuals are working in the community, supported through individualized funding contracts.

West Kelowna

West Kelowna has seen an influx of new participants over the past year. The addition of these new referrals, along with new staff, has made West Kelowna more active and involved in the community. Activities now include hiking, golfing, and community gardening. A food curriculum has been developed to teach individuals how to grow, harvest, and prepare meals. Moreover, the introduction of a music therapist, who visits weekly and assists in achieving volunteer goals, has been highly welcomed.

Individualized Funding

Pathways supports fourteen Individualized Funding contracts throughout the year. Each contract is tailored to the specific requirements and individual needs of the person being served. One contract offers full-time support from Monday to Saturday, with longer shifts primarily at the individual's home and assistance in personal care, cooking, cleaning, as well as community engagement through event participation and activities.

Four contracts are full-time, supported from Monday to Friday, three of which are during Pathways service hours and one from 8:00 am to 1:00 pm. Among these, three

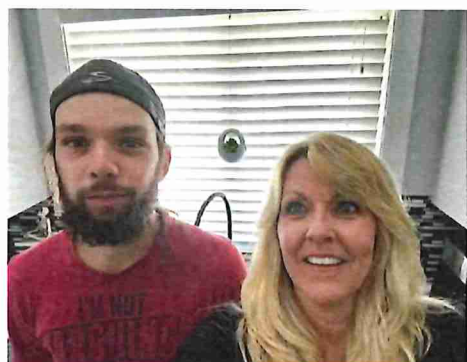
contracts primarily support individuals in the community, while one provides additional support to an individual during Pathways' planned activities.

The remaining nine contracts offer part-time hours or part-time days. Three of these contracts provide support for two days a week, while the other six support individuals for one day each week.

Respectfully submitted by: Joanna Wittke and Ryan Boychuk, Activity Supervisors

Home Share

Home Sharing is when a person or family in the community shares their home with an adult with diverse abilities. Home share providers ensure a safe, respectful, supportive environment to foster an individual's independence and growth in a manner that reflects their lifestyle choices. Pathways home share coordinators are responsible for matching individuals and caregivers to ensure that it will be a positive long-term fit.

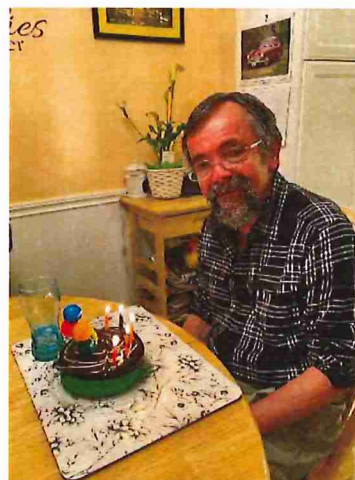


Pathways' team of home share coordinators has changed this year including a coordinator moving to a new position. Laryssa Rock has been a Home Share Coordination Manager (HSCM) since May 2019. Michelle Blackburne became a HSCM in April 2023, a position she briefly held in the past. Alaina Reiswig stepped in as a temporary HSCM position from May 29, 2023 to July 28, 2023. Pathways recently hired a new part-time HSCM, Rich Landry. Rich began his orientation on July 18, 2023. HSCMs have team

meetings with the Executive Director approximately every two weeks to discuss current projects, issues, and notable events from their caseloads.

Pathways currently has 59 contracts or individuals supported in home share and 46 home share providers. Thirteen of these home share providers support two individuals in their homes, and 33 of them support one individual. Pathways currently has three active referrals for individuals seeking home share, and there are two individuals currently living in Pathways home shares that would like to move.

As of November 1, 2022, Pathways was allotted additional funding by CLBC to recruit new home share providers. The funding amounts to 15 hours per week. We have developed a Home Share Recruitment Action Plan, which is updated regularly. Our recruitment efforts have included submitting a promotional article with KelownaNOW, setting up a home share booth at the Okanagan Regional Library, distributing advertisements to Interior Health and other community organizations, posting ads on Castanet, and increasing our awareness on social media platforms such as Instagram and Facebook. We have also introduced an



incentive program. If home share providers refer someone to become a home share provider with Pathways and they successfully contract with our agency for six months, the home share provider who submitted the referral will receive a \$200 gift card. We continue to seek out new recruitment strategies!

Pathways had a CARF audit in March of this year, and one suggestion that they had was to complete medication competency-based training annually. We previously completed medication audits with home share providers once when they were onboarded and if there were any changes to the individual's medications. We have revised our Medication Competency Training form and now complete these annually during our Safety monitoring visits. In April 2022, CLBC released a new set of Standards for the Coordination of Home Sharing. Pathways' Home Share service is already meeting all the standards.



There are currently 39 men, 19 women, and one individual who identifies as non-binary being supported in Pathways home shares. Eleven individuals are seniors over the age of 65. One of the biggest struggles we are experiencing as HSCM is the lack of support for aging individuals. Several individuals in home share are reaching the point where their needs are becoming higher than what the home share provider can or is willing to support. Long-term care is a dwindling resource, and CLBC often expresses that they would prefer individuals to remain in home share until the end of life. The lack of respite funding makes it difficult for home share providers to get a break when they need it, and sometimes home share providers are not capable of handling physical support needs such as lifts and transfers, washroom support, and bathing support. We continue to work with CLBC and other resources such as Health Services for Community Living (HSCL) and posAbilities to ensure that these individuals are receiving the support that they need.

Pathways currently has four approved home share situations available; one home share provider who was approved in June, and three home share providers who want to support a second individual. Pathways also has two individuals who have submitted their applications and they are still in the process of submitting requirements before we can begin the home study. We have received three inquiries from people who are interested in home sharing, but we have not received any applications or completed requirements yet.

Starting August 1, 2023, individuals received an increase of \$125 to the shelter portion of their PWD funding from the Ministry. This increase goes toward the home share provider and not the supported individual. Home share providers currently receive \$716 per month for room and board for individuals under age 65, and this increased to \$841. Home share providers have signed contract amendments which will be kept on their file.

Respectfully submitted by, Laryssa Rock, Home Share Coordination Manager

Apartment Subsidy

Pathways administered fifteen apartment subsidies through our finance department in partnership with BC Housing, down from eighteen the prior year. The recipients gave up their subsidies due to health issues and financial changes.

An annual application is completed and sent to BC Housing each year for each of the individuals. We follow the guidelines established by BC Housing and the budgets they have set for our area. Rates are also established based on the person's earnings. The society collects the rent due from the person either directly from the Ministry of Housing and Social Development or from the person directly and collects the BC Housing portion. We in turn pay the landlords the complete amounts.

Submitted by Rhonda Campbell

*Activity Quality Assurance
Manager's (AQAM)*

Report

ACTIVITY QUALITY ASSURANCE

2022 – 2023

It has almost been twenty years since our first Commission Accreditation of Rehabilitation Facilities (CARF) survey. In March, we completed our seventh survey. In our 2020 survey, we met one thousand sixty-seven standards and received only seven recommendations. We received a three-year accreditation for this year's survey, met all the CARF standards, and received zero recommendations! According to CARF, this accomplishment is achieved in only three percent of CARF surveys. That is three percent of the over thirty thousand organizations that seek CARF accreditation. This achievement is due to our fantastic employees who strive to provide the best possible support to the individuals we serve.

Annually each service area develops goals or outcome measures for the year. The outcomes fall into four different categories. *Effectiveness*, results achieved, outcomes observed for persons served; *efficiency*, the relationship between resources used and results or outcomes obtained; *business function*, and *satisfaction*. To gauge satisfaction, Pathways sends out satisfaction surveys annually. This year we sent out five hundred thirty-two surveys to our stakeholders. We had eight outcomes in the satisfaction category, and we achieved all eight of those goals.

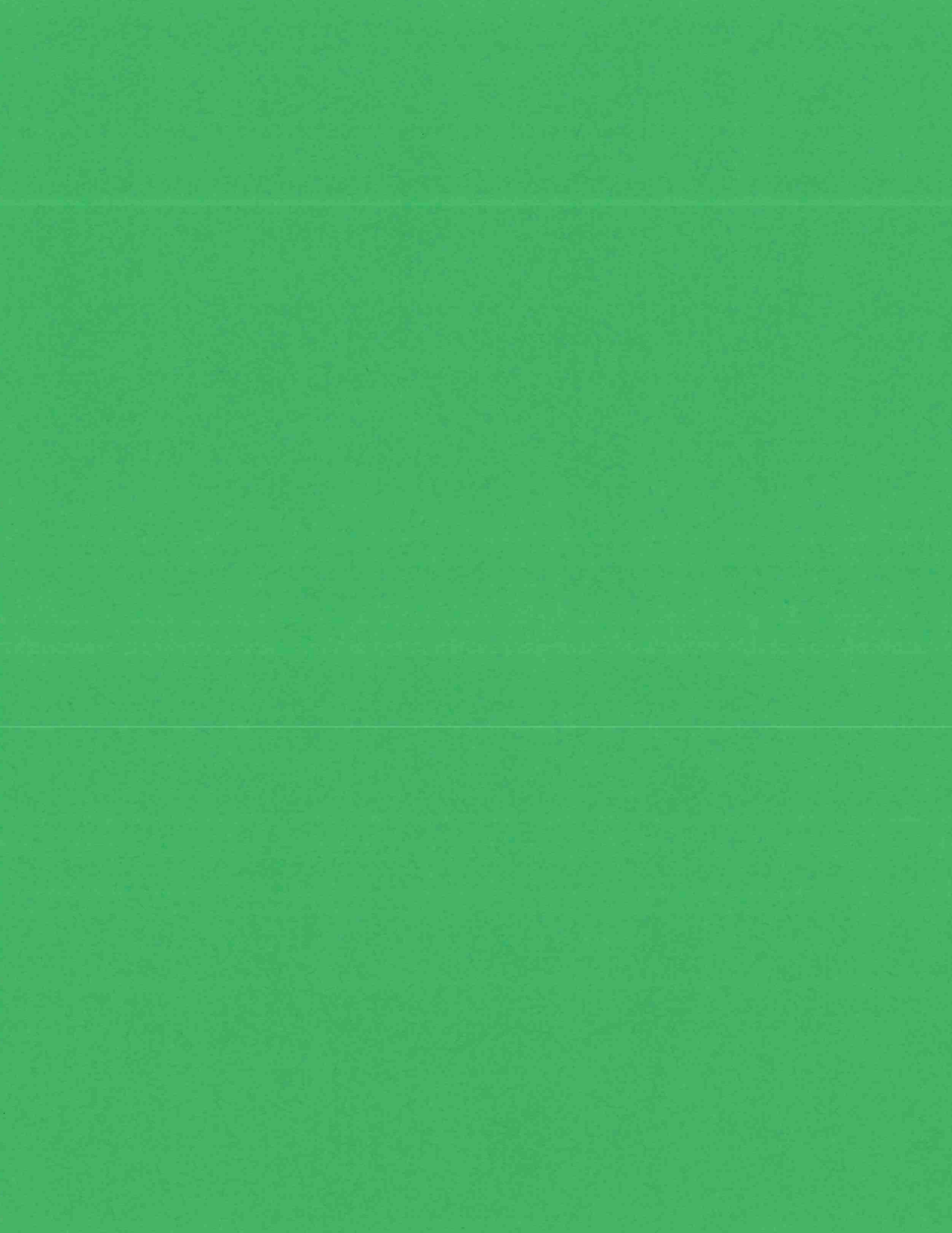
The satisfaction survey responses are analyzed in the Review and Analysis report. This report also examines the demographics, participation in services, exits, entrances, and outcome measure results for the fiscal year. We saw a five percent increase in our Home Share Service area and a seven percent increase in the individuals supported by the agency. The full report can be found on our website.

Quality assurance also ensures that our services are provided in a safe environment. An external organization inspected all our locations. This year, Vin McConnachie from c4u inspections completed these inspections. Any deficiencies were added to our Risk Management and Accessibility action plan, which is reviewed monthly by the leadership team. In addition to this inspection, our Joint Occupational Health and Safety Committee completed two internal inspections of all our locations in September and March. Anything needing attention was also added to the Risk Management and Accessibility action plan.

One safety concern that arose last year was the ability of wheelchair users to navigate into our Franklyn location from Franklyn Road. The terrain between the road and the sidewalk is not paved, and one of our employees who uses a wheelchair tipped over on her way to work. Our solution was to extend our sidewalk to Highway 33, making it much easier and safer for people in wheelchairs to enter our building.

Respectfully submitted by Helen Phelan, LPN, Activity Quality Assurance Manager

*People and Culture
Manager's
Report*



PEOPLE AND CULTURE REPORT

2022 – 2023

This has been a year of transition. The residual effects of the pandemic impacted staffing, and employee recruitment and retention were the focus for much of the year. Professional development embraced new models of learning, community partnerships were initiated or strengthened, and the department engaged in increased environmental awareness. An internal audit of human resource systems occurred resulting in a major revision of the new hire orientation procedure.

Recruitment. An identified goal, early in the year, was to achieve a consistent applicant stream while planning for and anticipating staffing shortages. The Labour market Impact Assessment application supported this goal, as did full effective use of the INDEED hiring platform.

Retention. It was recognized that a sense of belonging contributes to engagement which prompted three initiatives. All management staff are now tasked with bi-weekly recognition of employee effort and achievement. Supervisors continue to boost morale and emphasize staff appreciation in monthly staff meetings. There is a featured employee of the month who is acknowledged and celebrated by the employees and organization.

Professional Development. A year long training schedule was developed which consists of monthly training – a combination of online and in-person – presentations with topics such as “Unconscious bias,” “All Behavior is Meaningful,” “Diversity and Inclusion,” and “Conflict Competence.” The LinkedIn Learning platform has been accessed through the Okanagan Regional Library which now forms part of our regular education and training.

Community partnerships were initiated or strengthened such as with the Ki-Low-Na Friendship Society (ceremonial drumming, orange shirts), the University of British Columbia (Psychology dept – several students assisting in planning social activities for Individuals), and WorkBC (a program that helps accommodate the costs of our pre-employment requirements, easing the burden for new employees and the agency.)

Environmental awareness. Our focus is paper reduction, and the strategy is to find options that lessen our paper usage and streamline the process for employees, such as scanning to create digital documents, using ADOBE for signing. Embracing an e-document platform is in the beginning stages of development, but we are hopeful this will ultimately facilitate a transition to a paperless system.

Revise orientation process. The goal was to streamline the onboarding process. This consisted of a revision of job descriptions, the implementation of a “Code of Conduct” to create more precise expectations of our new and current employees, and adding a ShareVision Orientation to each specific department, which allows Supervisors to reinforce what is expected for documentation in their service area. We rewrote our

Agency Orientation, simplifying repetitive areas and adding information that needed more focus. We have also updated our checklists, probation reports, and evaluations to reflect these revisions.

In May, a staffing change occurred with the hiring of a new People and Culture manager. At the time of writing, he has completed his third month of probation.

Submitted by Joe Harrison, People and Culture Manager

*Building Manager's
Report*

BUILDING MANAGER'S REPORT

2022 – 2023

I began work with Pathways after a lengthy pandemic and amid a long process that's been years in the making! The building was starting to take shape, and I was happy to be a part of the team to help push it over the top! When finished, we offered affordable and subsidized studio, one-bedroom, and two-bedroom apartments to individuals and families in the community- 68 homes in total.



Greyback Construction was doing their best to keep things moving as smoothly and efficiently as possible. Delays happen, and changes are all part of construction – so opening took longer than anticipated. In early May 2023, we were given our operational permits and could finally start bringing tenants into the building!

We spent countless hours ensuring

we were opening our doors to people whom we felt would be the start of a kind, caring, community-minded group who would be a positive addition to the downtown core and would give the organization the best chance at starting this new adventure off on the right foot!

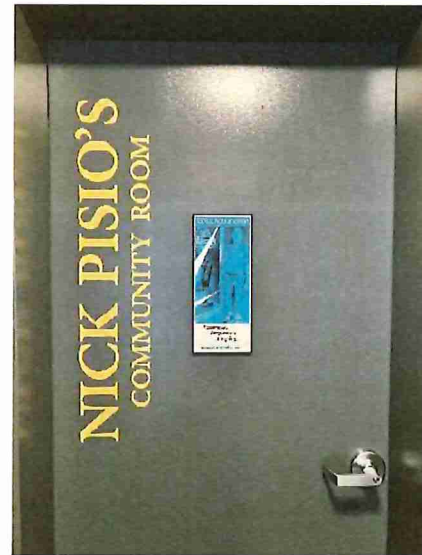
On May 10, we brought our first tenant into the building!



On June 16, we held our grand opening – which included many dignitaries from the province, the city, and members of the Hadgraft and Wilson families. The building name and the newly installed sign were the perfect way to celebrate two families that have done so much for Pathways over the years. In addition, the Nick Piso Community Room was unveiled to recognize the tremendous contribution Nick Piso has made to the society. It was a fantastic event that capped off many years of work by so many people in order to make it happen.

We are now nearly full and I am encouraged to see how the building and its tenants are coming together to provide an inclusive and caring home for so many. It is an honor and a privilege to be a part of this process and of this organization, and I look forward to seeing Pathways grow and improve the community and the lives of the people we support.

Respectfully submitted by Terry Ginther, Building Manager



*Executive Director's
Report*

EXECUTIVE DIRECTOR'S REPORT

2022 – 2023

“Coming together is the beginning. Keeping together is progress. Working together is success.” Henry Ford

The quote summarizes a momentous year and speaks to the great team we have at Pathways Abilities Society!

In 2023 we celebrated 70 years of community service!

The construction of Hadgraft Wilson Place was completed and an occupancy permit was issued, April 28, 2023. The first tenants moved into the new building on May 10, 2023. The grand opening celebration occurred on June 16, 2023. Terry Ginther was instrumental in ensuring the building was constructed to the highest standard and tenants felt welcomed (thank-you)!



We completed our seventh CARF accreditation survey and received no recommendations! An achievement rarely accomplished! Helen Phelan and Laryssa Rock did an incredible job preparing for the survey (thank you)!



We hosted two celebratory barbecues to celebrate 70 years of community service. The first was at our 123 Franklyn Road location in June for individuals, their families, staff and contractors. The second in July at Rutland Centennial Hall which was open to the community. Both events were well attended!

The actual date of our inception June 10th, Cyndy Omand

coordinated (thank you!) a “staff reunion” at the new building and dinner at the Legion after. It was so great to see new staff and staff that had left our employment participating!



The City of Kelowna proclaimed October 2022 “Community Inclusion Month.” We hosted our first “Inclusion Chain” since the pandemic in front of Kelowna City Hall where mayor, Colin Basran, presented the proclamation.

We held our second "Staff Razzie Award" in November 2022 and fun was had by all who attended!



The year ended with the annual holiday party with a luncheon at Rutland Centennial Hall. Employees from BDO graciously donated their time to serve the lunch (thank-you)!

Joe Harrison joined our leadership team as our new People and Culture Manager in May 2022. He implemented new initiatives to attract new employees which have proven to be very successful. As I write this report, we only have one external vacancy!

Significant financial donations were received from Columbia Bottle Depot, Randy Christian, Kelowna Nissan Infiniti, Centra Cares (Centra Windows), Laser

Glass Railing, Jean Yuros, Patrick D'Vaz, Secure-Rite and Charisse Daley. Unfortunately, the annual Vipond Golf tournament was cancelled again.

Sadly, this year Tracey Anderson, Adam O'Brien and Ervin Pasula passed away. Tracey participated in various Pathway's services for 37 years. Tracey loved to curse, celebrate her birthday and had an amazing sense of humour. Adam was a social butterfly and always willing to help others. Ervin was supported through Home Share and was with the society for a very short period of time.

Each year at the end of my report I thank and acknowledge the people and groups that enabled our organization to be an excellent community service provider. As I continue to state in each of my reports, I hope the repetitiveness of this section does not take away from the heartfelt and truly grateful feelings I wish to express. Without all those listed below, we would not be making a difference in our community. **THANK YOU:**

♥ Our staff, including the leadership team. I just cannot say enough how grateful I am to work with such a remarkable group!

♥ The people we support. They were very patient and understanding, adapting to the many staffing changes.

♥ All our volunteers; new and longstanding. They continued to enhance our services!

♥ The Pathways' Board of Directors. They continued to demonstrate their commitment to strong governance, community inclusion and leadership.

♥ Community Living BC (CLBC) our primary funder and partner. We continued to work collectively to serve our community. I would like to again specifically thank Eva Gunther our CLBC liaison. Eva was always available and extremely supportive.

♥ The many individuals, families and groups that continued to support our society.

♥ Our other community partners and supporters including employers and volunteer sites, Columbia Bottle Depot, M 'Akola Development Services, BDO, Knights of Columbus Father Delestre Council, Gaming, Interior Health, the Ministry of Housing and Social Development and BC Housing who worked in partnership with our organization to serve individuals and the community.

♥ **Thank you all again!**



Respectfully submitted by Charisse Daley
Employ, Empower, Embrace

