



Windsor Essex Brokerage for Personal Supports

Annual Report

December 12, 2019





Mission

Through independent facilitation we walk alongside people with developmental disabilities and those they trust to inspire them to think about what they want and to take action as citizens in their neighbourhoods and community.

Vision

Contributions, Citizenship, and Freedom for People with Developmental Disabilities.

Values

Community is the first resource so that people see the community as a place to start in becoming participating, valued, contributing citizens.

The expertise of people with disabilities and their families, friends, and allies is acknowledged so that people with disabilities and their families, friends, and allies define what they want and what works best for them.

People have control over their lives so that people are able to choose what “a good life” means to them and have control over their information, funding, and support that moves with them and enables them to live that life.

Community solutions are innovative and creative so that, like the rest of us, people with disabilities can forge their own path in the community rather than being ‘plugged into’ what already exists.

Separating the functions in a transformed system are promoted providing individualized support dollars and separating the functions of independent facilitation and planning; service delivery; and autonomous groups are essential to people having control of their lives.

Acknowledgements and Appreciations

Our year in review begins with deep gratitude for the presence, passion, and gifts of the many people who contribute to Windsor Essex Brokerage for Personal Supports.

We deeply thank the Brokerage Board of Directors, who ground our work through their vigilance, fortitude, and careful discernment.

In September 2019, the Brokerage Board expanded its expertise through the election of its newest member, Chris McCandless. Chris brought profound life experience to the Board and enriched conversations by sharing his perspective as a father of three young men who live with disabilities.

As a mother of an adult son who lives with a disability and experiences a full, meaningful life in his neighbourhood and community, Maria Ala consistently contextualized discussions by highlighting prevailing concerns of people and families in Windsor-Essex county.

Driven by his passion for social justice, Mason Herberholz continued to offer his extensive and expanding knowledge of law to inform Board decisions.

Paul Fulton's astute business-sense encouraged the Board to think strategically and consider the socioeconomic factors that influence our work. The Board relied greatly on his decisiveness and critical thinking.

As long-time Board members, Milt Byrd, Darlene Byrd, Debbie Desjardins, and Carole Behrens deepened conversations, reminding Brokerage of its rich history. They preserved the spirit of Brokerage and kept us rooted in our principles and values. We acknowledge Milt's practical and judicious mind, Darlene's remarkable attention to detail, Debbie's energy and attention to community connections, and Carole's deep contemplation and commitment to inclusion.

Marleen Crawford continued to serve as a historian and oracle of Brokerage. We were blessed with another year of Marleen's tried and true leadership. As our Board President, Marleen dedicated her time, her experience, and her profound wisdom to Brokerage and to local, provincial, national, and international efforts to promote equity for people with developmental disabilities.

We wish to thank the staff, self-employed independent facilitators, graphic facilitators, and people and families for their courage and loyalty through a rich year of transition and learning. We are incredibly fortunate and honoured to serve alongside such talented people. Thank you for the abundant gifts that you bring to Brokerage!

Thank you to our partners - Windsor-Essex Family Network, Community Living Windsor, Legal Assistance of Windsor, St. Francis Advocates, Family Services Windsor-Essex, the City of Windsor, the My Home My Choice group, the local Microboard working group, the local Supports to Decision-Making design group, and the Ministry of Children, Community, and Social Services (MCCSS) - for your creativity, sincerity, and industry. Your devotion to creating possibilities has allowed many people and families to pursue new opportunities to experience rich, meaningful lives in their chosen neighbourhoods and communities.

We are grateful for the Ontario Independent Facilitation Network and our collective endeavours to imagine a developmental service system that supports people and families to raise their voices, exercise choice and decision-making power, and realize their visions for ordinary, everyday lives.

We extend our profound thanks to the Ministry of Children, Community, and Social Services, and, particularly, for the guidance of Michelle Burd, Shawn Derdeale, and Derek Nardini, who have served Brokerage in the role of Program Supervisor at various periods in the past year.

Governance

Throughout 2019, the Board of Directors continued to make informed decisions regarding policy, oversight, and decisions about the organizational mission, vision, and mandate. In addition to its financial management and oversight responsibilities, the WEBPS Board continued to focus on community relationships and broader social impact.

The Board of Directors met its obligation to provide ethical standards as well as quality of management service through monthly reports. Additionally, the Board of Directors completed all annual quality assessments and gave careful attention to sound approaches and risk management considerations. Throughout the year, the Board engaged in diligent review and fulsome discussions around policies and procedures, prudently responding to changes to laws, regulations, and employment standards.

All financial responsibilities were undertaken according to best practice methods and reviewed on a regular basis. Ongoing, open dialogue with third-party financial services continued as an essential safeguard and accountability measure, which included thorough review of budgets, financial reports, and opening and closing of the books. All ongoing monthly, annual, and other audited statements were examined by the Board.

Our Work in Service of People and Families

People who live in Windsor and Essex County, along with their families, continued to show great strength, courage, creativity, and flexibility; despite limited funding, people and families continue to seek out opportunities, as they take next steps toward a full life in their chosen neighbourhoods and communities. Many people are very clear about what they want and ready to move out of their family homes, but support dollars that are individualized are needed for people to move forward. Support networks made up of friends, family members, and others continue to play key roles in supporting people to think through decisions and implement and reflect on action steps.

This year presented challenges to many people and families, as they were faced with more strict procedures and standards within systems that question the capacity of people to make decisions, especially related to power of attorney and financial management. As more and more people and families feel that guardianship is the only available option, Brokerage continues to push for and support alternatives that acknowledge the capacity of people, working alongside their loved ones, to exercise choice and control in all aspects of their lives. In addition to our work on supported-decision making, Brokerage is also considering ways that people are supported to get the education they need in order to pass literacy and numeracy requirements on capacity assessments.

When news broke in December 2018 that funding for the Independent Facilitation Demonstration Project (IFDP) was coming to an end in March 2019, people, family members, and allies lifted their voices, calling on the government to reconsider cuts to this funding. When two local gatherings were led by Windsor-Essex Family Network in January and February 2019, over 100 people came out – some people even attended both gatherings. Powerful stories and letters were shared with government, conveying the benefits and outcomes that Independent Facilitation has had in the lives of people and families who are looking for different ways to work toward their life visions. Although the project funding was ultimately cut-off, the tremendous response by people and families was a clear message to Brokerage that our work is valued and important in this community. Ongoing efforts continue to be led by the provincial Independent Facilitation Matters Coalition to raise the voices of people and families and maintain momentum for change, so that Developmental Services truly support people, working alongside their loved ones, to experience ordinary, everyday lives.

Between May and July, Judith McGill visited our community on three separate occasions, leading learning sessions with people and families, Brokerage facilitators, and some agency staff and offering mentoring on strategies for interviewing and engaging with supporters. As people and families face many challenges securing and holding onto reliable supports, they continue to apply valuable learning from these sessions and look for innovative ways to find and engage supporters.

Over the summer, the Brokerage website received a complete re-design, in order for Brokerage to offer an accessible, user-friendly place for people to get clear information. Brokerage is pleased to showcase a fresh design that provides easy navigation and updated content, including a wealth of information about Independent Facilitation, links to supportive organizations, and a growing collection of electronic resources for people and families.

In September 2019, the Brokerage team and Board members gathered for a 1.5 day strategic planning session, led by Lynda Kahn and Jack Pearpoint of Inclusion Press. Picking up on meaningful discussions and reflections from the last visioning gathering in June 2018, we focused on the threads and themes that contribute to social change, as well as possible next steps to achieve a vision where people experience freedom, belong, are known, and make a difference in their neighbourhoods and communities. To support Brokerage through this time of significant transition, an inventory of gifts and commitments was taken, so that all who attended felt reassured that Brokerage will continue to serve people and families well and maintain a strong community presence. As we continue to hold and reflect on the themes of our discussion, Brokerage looks forward to hosting a Resilient Leadership learning retreat, to be facilitated by Lynda and Jack in February 2020.

Leadership and Engagement

This year presented many opportunities for Brokerage to contribute to relationship-building efforts with the new government and promote understanding of the United Nations Declaration on Human Rights, as a foundation for ongoing policy development. From participating at town hall meetings with Members of Provincial Parliament in March 2019 to attending a local meeting with MCCSS Minister Todd Smith in October 2019, facilitators as well as people and families connected with Brokerage have found moments to share their profound stories and emphasize the difference that Independent Facilitation through Brokerage has made in their lives.

Furthermore, Brokerage remained committed to broader national and international impact, participating in and leading a number of learning opportunities. Brokerage continued to share messaging around Independent Facilitation as one key element that supports people to live rich, meaningful lives, along with important contributions of individualized direct funding, affordable and accessible housing resources, staffing resources, and administrative resources. The collective support of these distinct, separate functions makes it possible for people to direct their lives. Individualized approaches and customized supports are key for people to become part of their chosen neighbourhoods and communities.

In September 2019, Brokerage worked closely with Alison Ouellette - a local family leader, Windsor-Essex Family Network, and Community Living Windsor to host three visitors from Australia and New Zealand. Connected through the International Initiative for Disability Leadership (IIDL) learning exchange, our guests spent two days learning about the history of the unique supports in our community and our imagination of the Empowerment Model, prior to heading to Washington, DC for the IIDL Conference. Inspired by stories shared by people and families, two of the three visitors took steps to allocate funding within their organizations for Independent Facilitation.

In October 2019, Brokerage participated in a video conference interview with leaders from Autism Nova Scotia and Horizon Community Development Associates to share local information and experience for a Housing Symposium. Brokerage highlighted the values and principles that are fundamental to Brokerage's history and journey and shared the important work that has happened around Individualized Funding and the Empowerment Model.

Brokerage continued to participate on the Windsor-Essex Adult Developmental Services Provider Committee to ensure good information exchange.

Brokerage was part of a Steering Committee for the Legal Assistance of Windsor (LAW) I-Decide Project, which was funded by dollars that were not claimed as part of the class action suit of people who were abused while in the large institutions in Ontario. The purpose of the I-Decide Project was to deliver rights-based education and services to community members with intellectual disabilities, in order to promote self-directed decisions and planning. Stephanie Dickson was hired by LAW for this project. Following the conclusion of this successful project in August 2019, Brendan Pooran opened a law office in Windsor and hired Stephanie Dickson.

In the next fiscal year, Brokerage will focus on sustaining our leadership presence in this community. As the Ministry evaluates duplication and looks to simplify service and support offerings, we will continue to distinguish our unique and vital role and uphold Brokerage as a place of information and collective learning.

Shared Learning and Collective Change

Our partnerships with agents of change enriched our understanding of the many factors that influence the lives of people and families and allowed us to deepen our knowledge, respond to the needs of people and families, and work together to build a resilient community.

Brokerage continued to partner with Windsor-Essex Family Network to host various educational events:

The RDSP and Dollars and Sense events educated folks and families about options for financial planning for people with disabilities and their loved ones. Brendan Pooran, Toronto-based lawyer specializing in disability law, delivered the presentations.

The Intelligence Lives Film Screening event offered opportunities for reflection on systems change, highlighting the stories of four people to exemplify the limitations of IQ testing in determining the full capacity of a person. Throughout the film, people exceeded their families' and their own expectations, proving that the IQ test was insignificant.

A learning event was once again led by J.P. Karam, a local labour and employment lawyer, who has spent significant time with Brokerage and partners to clarify parameters for self-employment and prepare families to enter into agreements with independent

contractors. Attendees participated in information exchange and shared learning about Bill 47 – Making Ontario Open for Business Act, which replaced Bill 148 – Fair Workplaces Better Jobs Act in November 2018. We continue to learn alongside people and families and community partners about the importance of distinguishing the roles and responsibilities of independent contractors, employees, and people and families who engage supports.

The Navigating High School Information Night event offered a warm and welcoming atmosphere for people and families to learn and connect. Similar to past years, the evening included a special dinner, panel presentation, information binder, and question and answer time.

WEBPS continued to contribute to the My Home, My Choice committee, which explores possibilities for individualized housing solutions, so that people may be supported to live in homes of their own choosing. On April 30, the Tech It Out event was held, which included inspirational stories and information regarding new technologies that may be able to assist people to live more independently and more safely. An inspirational event was also held on October 23, which focused on deep listening in support of people making their own decisions and leading their unique visions for their home and life. Moreover, three rent supplements that were granted by the City of Windsor last year continued to support folks this year, and additional rent supplements were granted, making it possible for an additional two people engaged in Independent Facilitation to secure affordable, independent living arrangements in the neighbourhoods of their choice.

Brokerage continued to partner on local development work related to Microboards, as a potential option for people and families to manage their resources and direct their supports. In September 2019, people and families gathered to reflect on work to date and consider next steps. People and families are looking closely at building trusting and supportive relationships with other family members and loved ones to ensure that safeguards are in place. Work continues on the development of an information package for people and families.

As the lead for transitional planning for youth who live with a disability, Brokerage continued to connect with young people interested in planning for the future. In partnership with the Greater Essex County District School Board, Windsor-Essex Catholic District School Board, and Family Respite Services, Brokerage hosted the annual Planning for Success - Life after High School event. Interest and participation in this event continues to be strong, as youth and their families begin to consider all that it takes to transition into adulthood. In September 2019, Brokerage invited Susannah Joyce, leader of Realizations Training in London, to facilitate a 1.5 day gathering with young people on Exploring Friendships. The seven youth who attended reflected on healthy relationships and shared ideas about how to find and build friendships. Based on feedback from the event, Brokerage is considering hosting another gathering in the next year to expand on learning, with a focus on how to maintain healthy online friendships, how to stay connected and reconnect with old friends, and how to communicate and problem-solve effectively in relationships.

When Community Living Windsor was asked to be the local lead for the Supports to Decision-making Project, they, in turn, asked Brokerage to be involved with the local project design. This provincial project is being led by Community Living Ontario, along with Michael Bach from the Institute for Research and Development on Inclusion and Society (IRIS) and Pooran Law. Windsor is one of five pilot sites, along with Dryden, Toronto, Brockville, and Oshawa. Local partners include Community Living Windsor, Windsor-Essex Family Network, Family Services Windsor-Essex, Windsor-Essex Compassionate Care Community, Alzheimer's Society, and Brokerage. This project is designed to work with people who live with dementia, people who live with developmental disabilities, and people who are working to improve their mental health. This project seeks to educate others and influence change on legal capacity in Ontario, moving toward legalization of supported decision-making, as an alternative to guardianship. Resources are required for Brokerage to contract with a facilitator to do this project.

Brokerage has entered into an agreement with Community Living Windsor to support people who are looking to move out of group homes. This opportunity granted Brokerage funds to hire a full-time facilitator who will be dedicated to this work. Significant time and effort has been invested to promote cultural change and educate CLW staff on Brokerage's history and role in this community and our enduring partnership with CLW. This project remains in early planning phases, and conversations continue with CLW managers to ensure that safeguards are in place and there is clear understanding by all about what it takes to support change.

Reflections on a Year of Transition

This year, Brokerage has moved through a lot of changes and continues to grow through transition.

As we approach Marlyn's official retirement as of March 31, 2020, we acknowledge and extend deepest gratitude for her many years of dedicated service. Through her fortitude, integrity, and leadership, Marlyn nurtured Brokerage as a small, yet hearty organization. We expect that Marlyn will continue to make impacts and inspire others in the next phase of her journey.

We are delighted to welcome Colleen Mitchell into a new role as the incoming Associate Director who will work closely with Domenic, as he continues in his role as Director. We wish Colleen ongoing success as she embarks on a new chapter with Brokerage. We are confident that Brokerage will continue to thrive through Domenic and Colleen's wisdom, scrutiny, and dedication.

Finally, we conclude our year in celebration of Brokerage's continued journey in service of people and families. Directed by our compass, our path is clear, and we look ahead to the next points of courage.

Respectfully submitted,

Marlyn Shervill and Domenic D'Amore

Don't Just

“Don't just learn, experience.

Don't just read, absorb.

Don't just change, transform.

Don't just relate, advocate.

Don't just promise, prove.

Don't just criticize, encourage.

Don't just think, ponder.

Don't just take, give.

Don't just see, feel.

Don't just dream, do.

Don't just hear, listen.

Don't just talk, act.

Don't just tell, show.

Don't just exist, live.”

— Roy T. Bennett, *The Light in the Heart*



Windsor Essex Brokerage for Personal Supports

Financial Statements

Year ended March 31, 2019

These figures have been extracted from the Auditors' Report and Financial Statements prepared by Collins Barrow Chartered Accountants dated July 15, 2019.

Please contact Domenic D'Amore, Director, with any questions.

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WINDSOR ESSEX BROKERAGE FOR PERSONAL SUPPORTS

STATEMENT OF OPERATIONS AND CHANGES IN NET ASSETS

YEAR ENDED MARCH 31, 2019

	2019	2018
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REVENUE		
Provincial grants	\$ 856,472	\$ 806,337
Fees	<u>348,582</u>	<u>192,432</u>
	<u>1,205,054</u>	<u>998,769</u>
EXPENSES		
Advertising and promotion	500	250
Bookkeeping and administration	8,082	-
Computer software	10,587	2,819
Fringe benefits	39,974	41,326
Insurance	9,926	6,378
Pension	16,898	20,689
Professional services	13,212	23,453
Purchased services	305,450	252,992
Rent	25,544	28,132
Repairs and maintenance	6,119	3,273
Salaries	395,781	413,856
Staff training	27,827	11,351
Staff travel	11,796	13,772
Supplies	59,205	45,716
Transportation	103,469	35,570
Utilities and taxes	<u>19,087</u>	<u>26,502</u>
	<u>1,053,457</u>	<u>926,079</u>
REVENUE OVER EXPENSES	<u>151,597</u>	<u>72,690</u>
NET ASSETS, BEGINNING	<u>411,925</u>	<u>339,235</u>
NET ASSETS, ENDING	<u>\$ 563,522</u>	<u>\$ 411,925</u>

See Accompanying Notes

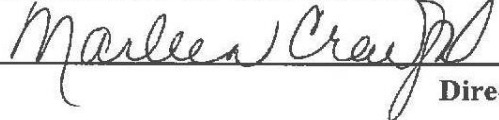
WINDSOR ESSEX BROKERAGE FOR PERSONAL SUPPORTS

STATEMENT OF FINANCIAL POSITION

MARCH 31, 2019

	2019	2018
ASSETS		
CURRENT ASSETS		
Cash	\$ 644,624	\$ 456,428
Accounts receivable	25,160	20,771
Prepaid expenses	<u>14,046</u>	<u>8,879</u>
	<u>\$ 683,830</u>	<u>\$ 486,078</u>
LIABILITIES		
CURRENT LIABILITIES		
Accounts payable and accrued charges (note 3)	\$ 99,210	\$ 52,419
Deferred revenue (note 4)	<u>21,098</u>	<u>21,734</u>
	<u>120,308</u>	<u>74,153</u>
NET ASSETS		
UNRESTRICTED	<u>563,522</u>	<u>411,925</u>
	<u>\$ 683,830</u>	<u>\$ 486,078</u>

ON BEHALF OF THE BOARD



Director



Director

See Accompanying Notes