**BALANCE for Blind Adults**

**Annual Report**

**2016/17**

Message from the Chair-Meenakshi Venkatesan

It is my utmost privilege to present to you the BALANCE for Blind Adults Board of Directors Report for the year ending March 31, 2017.

If the previous year 2015-16 was a period of transition, this year 2016-17 can aptly be labelled as a year of progression and future vision for our clients. In keeping our core funding relationship with the Toronto Central Local Health Integration Network (TCLHIN) and relocation to a more centralized location in the GTA, we hope that we have been able to better serve the clients at BALANCE.

The Board of Directors wishes to take this opportunity to announce the following key accomplishments in Fiscal Year 2016-17:

The unveiling of the 2016-2020 Strategic Plan last year acted as a strong framework and a guideline to envision and accomplish a great deal in year

1. Enhancing the access to technology services and strengthening the core services, as well as partnering with like-minded services in the community are some of the key highlights that aligned with our strategic plan. As we walk into year 2 of the Strategic Plan, we aim to build and strengthen this organizational capacity through its core services and programs by enhancing partnerships, generating revenue streams and marketing strategies.

The Board Governance Committee had undertaken a complete review of the Corporation’s Articles and By-laws. Our revised By-laws will be aligned with the governance and accountability framework envisioned under the Not-for-profit Corporations Act, 2010 (ONCA), as well as clarifying and redefining the membership framework. In order to ensure effective governance and oversight, the membership framework will require that only individuals elected as Board of Directors will be deemed members of the Corporation. The Governance Committee is near completion and the revised By-laws will be updated by Spring 2018.

Client feedback has played a vital role for the organization to aid in strengthening its capacity to serve the clients’ needs. To this end, the Board recently initiated a town hall approach on two different dates in June 2017, to be able to directly hear your thoughts and suggestions for enhanced services. Your feedback has been documented and all these inputs will be taken into consideration as we plan the next year. We have been encouraged greatly to continue this approach and hope to repeat the town hall within a six month period.

A heartfelt thanks to all the outstanding staff at BALANCE! Your utmost dedication, patience and positivity forms the basis and lifeline of the ongoing client services at BALANCE. Thank you, Deborah, for your profound leadership as Executive Director and steering the organization forward to greater heights.

Thank you also to all our present and past clients. Your trust and belief in us has encouraged BALANCE to be able to serve you better.

I would like to thank all the members of the 2016-17 Board of Directors for their dedicated time and commitment in upholding the values of the organization.

Message from the Treasurer-Amish Lakhani

It gives me great pleasure to report our financial statements for the fiscal year ended March 31, 2017. BALANCE is reporting net assets of $300,221 at year-end which is an 11% increase from $271,500 from last year. This is due to an excess of revenues over expenditures of $27,790 during the year, driven by an increase in investment value of $7,448 and significant savings in occupancy costs. The reexamination of our investment holdings conducted in 2016 bore fruit as the market value of investments increased by 7% year-over-year to $238,029, including $7,859 in investment income. This is consistent with the desired objectives of the investment holdings - to grow in a manner which enables funding ongoing operations, while remaining adequately conservative to minimize the risk of capital erosion.

BALANCE’s total assets at the end of this year were $332,396. This is an increase of $31,441 from last year’s ending asset value of $300,955. This is primarily attributable to an increase in cash on-hand as well as the aforementioned appreciation in the market value of investments.

BALANCE’s total liabilities are $32,175. This is entirely made up of short term accounts payables and deferred revenue largely pertaining to a donation for training center upgrades. This figure has increased from last year, but is coincident with a rise in cash and receivables, and represents only a small percentage of BALANCE’s net assets.

Revenues were down this year relative to last, due to a one-time funding from the LHIN in 2016 to cover transition expenses; however of note, donations, grant and fundraising revenue recognized in 2017 was $17,299, up significantly from prior year. Further, with the move to BALANCE’s new office, rent expense was down 48% to $25,081 which enabled important and beneficial investment in the website and computer upgrades. As in previous years the majority of the expenses are related to employee compensation (80% of total expenses).

2017 was a year of renewal for BALANCE. Amongst many other things, we have a new, vibrant office space and a strong strategic plan. This positive change has been reflected in our financial results for the year, with solid investment performance, excellent fundraising results, focused savings and strategic reinvestment in the business. Thank you to the wonderful BALANCE staff, helmed by our Executive Director, Deborah Gold, my Board colleagues and all of the organizations’ supporters for making this possible. With continued hard work and support, I have every confidence that the successes of 2017 will persist long into the future.

Message from the Executive Director-Deborah Gold

When I started at BALANCE on April 13, 2016, it was a small organization with a strong commitment to clients, and quite frankly, my initial impression was that BALANCE, was in some ways hungry for positive change and new energy. However the future seemed very hopeful with a new strategic plan, a board that was in the midst of self-renewal, a move to a vibrant new location, and the move to the Toronto-Central LHIN. I was excited to get started and see where the adventure of this career move would take me and the organization!

To say the least, it has been a year of growth and learning, both for the organization and for me. We have generated a positive relationship with our new LHIN, a new source of revenue through a first partnership agreement with Accessible Media Inc. and a wonderful new private donor and strong relationships with Reconnect Mental Health/Reconnect Shared Services, LAMP IT services, the Toronto Reference Library and the University of Toronto Occupational Therapy Department, as well as St. Joseph’s Hospital departments, OCAD University’s Inclusive Design Research Centre, and others. In addition, we have developed both the client management process and the strength of the staff team over the course of the year.

I remain grateful for the opportunity to lead at such a warm, welcoming and exciting organization. We continue to serve our clients well, and we believe our efforts play out in the number of new and returning clients we have seen this year. Each month, the number of clients returning for service after some time away, has remained high, averaging around 7 per month. One cannot ask for more than an enthusiastic participant who has heard about our new programming or our new instructors, and wants to return. We have certainly been busy, and that story is told through our statistics; we have also been able to provide some unique new programming. The challenge for year 2 of the Strategic Plan is to sustain and grow this activity while achieving a great deal more towards the strengthening of our infrastructure, the realizing of efficiencies and the generation of new revenue streams for BALANCE.

I look forward to the challenge!

**2016/17 Highlights**

Growth

During the 2016/17 fiscal year BALANCE saw an extraordinary 50% increase in the number of clients served, with a grand total of 151 receiving rehabilitation and instruction.

In Q4 we began a pilot project of additional specialized Wellness programs and another of iPhone classes. With these additions to our suite of service options, the group participation rates also increased with 235 participants in Q4 in comparison to the 11 participants in Q1. This rise in participants lead to 61 group sessions in Q4, a significant increase from the 21 group sessions held in Q1.

Changes

BALANCE experienced not one but several exciting changes over the course of the year, including:

* A new and more accessible location of the office
* Shift from Mississauga- Halton to Toronto Central LHIN funding
* A new strategic plan for 2016-2020
* The addition of 2 new group programs
* The hiring of 3 new staff
* A generous gift of $20,000 from an anonymous donor made possible significant upgrades for our technology training centre, staff computers, and office furniture

Online Presence

As the World Wide Web and social media continue to be valuable resources in terms of communication and marketing BALANCE chose to revitalize its online presence, through:

The re-launch of BALANCE’s Facebook page and Twitter feed in spring 2016; and the launch of BALANCE’s new website in December

This proved to be a success as BALANCE’s Facebook page followers increased by 250% in the fiscal year.

Along with social media another very popular method of learning about BALANCE is through our website, a simple way to access information regarding BALANCE. Current analysis of BALANCE’s website through use of Google Analytics found:

Between the launch of the website in December 2016 and end of fiscal year March 2017 there were a total of 1738 visits to the BALANCE website.

Of these site visits 70% of the users were from Canada, with the remaining 30% of the users originating from countries like the United States, United Kingdom, Russia, India, and Germany.

Within just a few months of the launch of BALANCE’s new website, it has shown some promising results with individuals all over the world have been given the opportunity to learn more about us.

**Client Stories**

Orientation Mobility

One young man has had very little independence in his daily life. He lives and is supported by his family, but is often left with little to do during the day when everyone is busy at work or school. Besides being totally blind, he is developmentally delayed and has difficulty communicating and understanding English which made conveying information and instruction challenging during our lessons.

One of his goals was to be able to independently travel to a local community center so that he could access the gym facility. Over the course of many months, he slowly learned some basic Orientation and Mobility (O&M)-travel skills-terminology (such as shorelines and parallel traffic), how to use an Audible Pedestrian Signal, developing listening skills to identify when it was safe to cross stop sign intersections, and the layout of the interior of the community center and gym facility. After over 30 hours of O&M lessons provided in 17 visits between February and July, this client had achieved his goal of getting to the community center and gym independently and safely.

Assistive Technology/ Employment Support

One of our participants was referred to BALANCE by (SCI) Spinal Cord Injury Ontario. The participant was being considered for an Administrative Assistant position in a print shop and he needed accommodations and training. The job requires him to answer & transfer calls, respond to email inquiries, find & book flights for management staff, and distribute mail to various individuals within the office.

Although the participant had very little computer or administrative experience, the employer had faith that the participant could do the job, so BALANCE stepped in to prepare the participant.

BALANCE began to assist the participant by first conducting an accommodation & training needs assessment. The findings revealed that the participant would need ZoomText Magnifier/ Reader to access his computer, and training in ZoomText, keyboarding, Microsoft Outlook, Windows navigation, and Windows file management in order for him to do the job. BALANCE installed ZoomText on the work computer and provided the needed training.

The participant started working part-time at the print shop and subsequently was appointed full-time due to excellent work performance!

Community Access Facilitation

Dorothy spent 3 hours one lesson working on her orientation to a new gym. She sent an email the following week, quoted below. Dorothy is familiar with using a gym and excellent at using what she learns. She is an exceptional learner. She recently moved to a new neighborhood and will continue to learn about the services and resources in her new area.

“I am just letting you know that I just got back from the gym. I got wheel trans, found my way around just fine, worked out on the machines and also spinning bikes, also found the washrooms yay!”

**Our Team 2016/17**

Board of Directors

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Bob Stark, Board Member

Gord Walker, Board Member

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Deborah Gold, Executive Director

Laura Antal, Office/Intake Coordinator

Direct Service Staff

Rosie Arcuri, AT Instructor

Chelsea Mohler, AT Instructor

Doug Poirier, AT Instructor

Tricia Morley, CAF and ILS Instructor

Anita Laurnitus, O&M Instructor

Jordon Dumoulin, O&M Instructor

Bill Phung, O&M Instructor