**BALANCE for Blind Adults**

**Annual Report**

**2017/18**

Message from the Chairs – Meena Venkatesan and Bob Stark

It has been an absolute pleasure to act as Chairs of the BALANCE for Blind Adults Board of Directors for the past year. We have a strong Executive Director and team at BALANCE who have continued to strengthen the organization through their unique skills and complete dedication. We are now serving more clients with more diverse services than at any time in our history.

This past year, our by-laws and policies were updated to align with the governance and accountability framework envisioned under the Not-for-Profit Corporations Act, 2010 (ONCA). While our policies will continuously be reviewed we made a major step forward in 2017-18 to update our by-laws and policy structure to align with a more modern framework.

We also continue to make steady progress toward our 2016-2020 Strategic Plan. With encouragement from the Local Health Integration Network (LHIN), BALANCE has explored various strategic partnerships with a vision to creating broader service offerings for our clients’ benefit. Many more group services were provided for a variety of community needs such as mindfulness, sharing space support group, women’s group, iPhones, BlindSquare, pre-employment, etc.

The Board of Directors would like to thank all the outstanding staff at BALANCE! There has been much change over the past few years and you have remained committed, thoughtful, hardworking and most of all, dedicated to our clients. Thank you to our Executive Director, Deborah, for your outstanding leadership in challenging norms and your willingness to explore new avenues of service and operations.

We are also grateful to the Toronto Central Local Health Integration Network (TCLHIN) for their continued support and funding.

We would personally like to thank all the members of the 2017-18 Board of Directors for their commitment and dedication to the organization.

And thank you to all our present and past clients for your patience and trust in BALANCE as we have restructured and explored new ways of serving you better!

Message from the Executive Director—Deborah Gold

Oh what a year we had in 2017-18! Time definitely flies when you are having fun, and also just when you are extremely busy growing a small organization. Just to illustrate how busy we were in this year, we had one less orientation and mobility instructor, and yet we had virtually the same number of visit hours with clients as we did in the previous year. In addition, we increased the number of individuals we served from 150 to 167, delivered 2626 hours of service, and held a total of 155 group sessions last fiscal year. These groups increased our ability to promote staff teaching talent and recruit expert group facilitators and instructors from the community. Indeed we doubled up on the numbers of groups we had held in the previous fiscal year, and we were able to continue popular groups like the Sharing Space Support Group and the iPhone classes, as well as add exciting new opportunities for clients through our partnership with Opera Atelier, our excellent BlindSquare and GPS workshops, which represent an internal partnership between Assistive Technology and Orientation and Mobility instructors, and our Balancing the Power women’s empowerment group, for which we have now begun to seek outside funding support.

I’m proud to say that all of the BALANCE group programming we’ve been able to offer in the past few years has been the result in large part of ideas brought to me by BALANCE staff, who are very enthusiastic about planning new group opportunities for clients, or by community members themselves, which is how we were able to work so successfully with Opera Atelier.

Once again, we experienced a year of change at BALANCE, and I truly wish to express my thanks to our incredible staff team and our amazing Board of Directors for their extremely hard work as BALANCE made a difference every day in the lives of adults who are blind. Based on our BALANCE strategic plan, my job as Executive Director is to develop the Operational Plan, and together with our staff, to ensure that our planned activities are achieved if possible, and our timelines met. For 2017-18, our goals included exploring all our revenue stream options, hiring a fund development consulting firm, establishing our new Client Relations Management System, promoting BALANCE to agencies and related services in the vicinity of our offices, the hiring of quality staff who have deep knowledge in needed areas, providing new professional development opportunities to BALANCE staff, increasing both the number and variety of group classes, and providing a sensitivity and awareness training package upon request (for a fee) within the community. Another significant goal of the year was to prepare for our accreditation review to take place in the current fiscal year.

We achieved these and other objectives, through the diligence and commitment of our hard-working staff, who consistently keep client needs and wishes at the forefront of their planning. Here is just a brief list of what occurred in the past fiscal year, from an operational perspective:

1. Our staff and board worked tirelessly on the development, organization and re-writing of many policies and procedures, in preparation for the review by the Canadian Centre for Accreditation. I would like to recognize Chelsea Mohler, our Accreditation Lead, for guiding this process so carefully and ensuring that the staff team stayed on track, on target, and on time. Thank-you, Chelsea!
2. We purchased our electronic database in the previous fiscal year, and we launched it in October of 2017, to great excitement from staff. No longer chained to the office in order to enter case notes, and with the ability to access the database from anywhere because it is on a website, staff were ecstatic about the ease of use and the ability to provide input to its improvement. In addition, they had input into its development and I would like to recognize Bill Phung, our Data Quality Specialist, and Doug Poirier, our IT coordinator, for their work with the ShareVision team in getting the system in place on time. In addition, my thanks go out to Bill for his ongoing training of staff on the system and his ability to calmly work on persnickety problems and sort out “the back end” of the system, as our system administrator.
3. While it happened near the tail end of the year, I’d like to state with pride that we achieved our goal of securing a fundraising firm to work with us to develop an effective fund development plan for the coming year. The plan was delivered to us in July of this current fiscal year, and I will report on this more extensively next year. Suffice it to say that you will see the results coming your way in some exciting fundraising opportunities and campaigns that will serve to build on the BALANCE story and on your stories too, if you wish!
4. In October of 2017, we held our first BALANCE Community Information Fair, which raised some funds for the organization from table rentals, but more importantly, provided a much needed service to the 65 clients who were able to attend, because they could get their questions answered by vendors and service providers, all in one place and it was held specifically for them. We are hoping to host this event again in April, 2019.

Close to the beginning of the fiscal year, we experienced one retirement, and at the end of it, we experienced another. The loss of two strong people, who had contributed so much as staff members, of course had an impact on both clients and the staff team; however these inevitable changes also bracketed a year that was filled also with several new staff members developing their roles, and the introduction of BALANCE to the concept of Occupational Therapy services through the placement of our first OT student in the summer of 2017. Building on the learning from this experience, we could then institute a permanent part-time OT position in the spring of 2018 and we welcomed Naomi Hazlett to our staff team in early April.

Another year of support from our anonymous donor meant that we could achieve more in both technology training and in ensuring the staff had what they needed in equipment and in training and development! We purchased needed equipment to run the BlindSquare program, as well as our Alexa, our Google Home and several new computers for staff members whose machines were on their last legs. We were able to get portable keyboards for staff to use with their iPhones, and new chairs for all staff, which was great since almost all staff desk chairs were broken. We also invested in JAWS upgrades, a ZoomText upgrade and the upgrade to the Duxbury braille translator for our training centre.

Training for staff took on a new tone as we were able to provide, for the first time at BALANCE, the following professional development opportunities:

1. AER O/M conference (for 2 staff members)
2. Compassion Fatigue and other issues related to providing social service supports, workshop for staff, February, 2018.
3. Building Cross-Cultural Competence, Feb, 2018, attended by Deborah, March of Dimes Training Institute
4. Private course for BALANCE service providers—Adult Education Principles by a George Brown instructor
5. ACVREP registration to certify as COMS-March, 2018 (exams to be written July, 2018)

In addition, during this fiscal year, BALANCE established the first mobile phone redistribution program for blind persons in the City of Toronto by making available, by application, a free used phone, after we purchased new mobile phones for all staff using our wonderful donation from an anonymous donor. The program continues as we have begun to solicit more used phones from the many companies that deal with us on a daily basis as vendors and suppliers. As we place these phones into the hands of needy clients, we have been able to increase access to information and independence through our AT training programs.

Finally, we developed new partnerships this year, including our pilot project partnership with the Toronto Reference Library, which went so well that we are on the verge of signing a new partnership agreement this year, and our agreements with West Toronto Support Services and 4 Villages Community Health Centre to host some of our group programming throughout last year.

I’d like to close by thanking our staff again for their incredibly hard work and enthusiastic participation on the team, and our dedicated Board of Directors for their commitment of time and energy that has guided and supported us through the year.

Message from the Treasurer – Darren Harper

I’m pleased to report on our financials for the fiscal year ended March 31, 2018. BALANCE undertook a request for proposal (RFP) process for audit services in 2017-18 and awarded the contract to Hilborn LLP in the spring of 2018. The resulting Audited Financial Statements confirmed the following for 2017-18:

-       An increase in ASSETS from $332,396 to $345,262 (3.9%)

-       An increase in LIABILITIES from $32,180 to $35,382 (10%)

-       An increase in REVENUE from $580,585 to $582,551 (0.3%)

-       $9,664 excess in revenues over expenses for the year.

Included in the above noted assets is BALANCE’s investment portfolio, which increased from $246,789 to $250,236 (1.4%) year over year.

Revenue from the LHIN remained unchanged at $536,743 for the year, but overall revenues increased on the strength of donations received.

BALANCE’s overall financial performance remained strong for the year with the team meeting deliverables and operating within Board approved financial parameters.