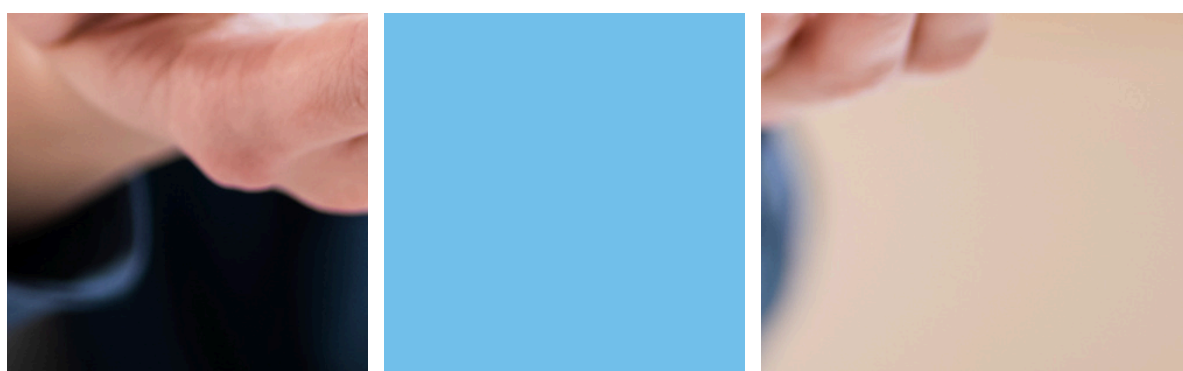




Annual Report

2023-2024 Business Year
July 1, 2023 - June 30, 2024



Letter from the President & CEO

hello

As we reflect on this past year, we are filled with excitement about the tremendous strides our organization has made. It has been a year of growth, alignment, and forward-thinking, setting the stage for an even brighter future.

In February, we had the pleasure of welcoming Jeffrey Adisam as our new Chief Operating Officer. Jeffrey brings a wealth of experience and a forward-looking vision that has already begun to enhance our operations. His contributions are not only strengthening our current structure but are also giving us great confidence in our future, including a clear succession plan to ensure our continued success.

A significant accomplishment this year has been the development of a clear and functional operational plan across all agencies. These plans directly support our strategic vision, allowing us to unlock new opportunities for collaboration between our three agencies and beyond. With this alignment, we are better equipped to deliver on our mission, ensuring our resources and efforts are maximized for the greatest impact to those we support and the communities we call home.

Additionally, our investment in Corporate Services has marked a pivotal move towards the future. By modernizing our technology and ensuring it is used effectively across all organizations, we are not only reducing costs but also positioning ourselves to better serve our stakeholders in the years to come.

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Letter from the President & CEO *continued...*

In early March, all three Boards convened to receive updates from Ministry personnel and our Strategic Planning Consultants on the progress of the 'Journey to Belonging' initiative. We also explored common interests in areas such as Branding, Governance/Board Orientation, Housing, and Advocacy. The Tri Alliance Board was encouraged by the shared interests and forward-looking suggestions from members of all three Boards. Significant progress has been made in unifying Mission, Vision, and Values across the Boards, as well as solidifying that of Tri Alliance. An ad-hoc Steering Committee, which has substantially completed its work, will make recommendations on the focus and structure of Tri Alliance advocacy early in the 2024-2025 Board term.

Of particular note, it is rewarding to see the seeds of hard work planted over the past two years are beginning to bloom. We are witnessing the benefits of greater integration across our agencies, with consistent branding, streamlined services, supports, and managerial oversight, and significant cost savings through the elimination of duplicated efforts.

None of this would be possible without the dedication and hard work of our valued team. We extend our heartfelt thanks to each member of our organization for their commitment and excellence. Together, we are building a stronger, more vibrant organization ready to meet the challenges and opportunities of the future.

*Warmly,
Michele and Ross*

Michele Bell

Chief Executive Officer (CEO)
Tri Alliance Shared Services

&

Ross Davidson

President
Tri Alliance Board of Directors



Mission

Tri-Alliance enables community organizations to achieve their individual mission, vision, and goals more effectively and efficiently by providing cost effective, value added management and administration services.

Goals

Tri-Alliance hires, develops, and mentors leaders and managers in key management and administration services. These services enhance the effectiveness of the agencies providing direct services in our communities.

As Tri Alliance...

We endeavour to amplify the impact of our regional not for profit community living enterprises. We believe in the power of collective strength and aim to provide an effective economy of scale for business services tailored to support these vital community hubs.

We:

- Open up new realms of possibility.
- Create a dynamic environment for not for profit and charities to thrive.
- Provide essential tools, expertise, and support.
- Commit to long-term prosperity for every enterprise.
- Make a lasting difference in the lives of served communities.



Strategic Plan

Every four years our strategic plan is updated. The plan is made based on key insights from our sector, understanding shifting populations, demographics, and economic factors, as well as conducting one on one stakeholder interviews. Combining the direct feedback from those we support, our team, and by understanding the current landscape, our strategic plan can best reflect the opportunities for success in achieving our goals.



Tri Alliance
SHARED SERVICES ORGANIZATION

Strategic Plan 2023-2026

Preparing for Sector Reform

Ensuring the preparedness of our team, the people we support, and the people who care for them for Journey to Belonging, everything we do will be considered and executed through the lens of customer choice and community inclusion.

Building a Technology Foundation

Designing and implementing modern, consistent, accessible, user-friendly systems and align them with efficient and effective processes across all organizations.

Excelling in Complex Support

Evolving our training, housing, and operations to continue providing the best services and supports for people with complex needs, building on our reputation and the changing needs of the people we care for.

Empowering our team

Recruiting, onboarding, communicating with, listening to, engaging, developing, and supporting our team members in creating a great place to work.

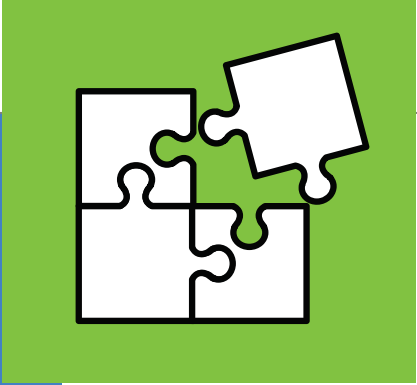
Empowering the people we support

Developing new ways to offer services and build skills in people we support and empower them to have a full life of choice and inclusion.

Developing Creative Housing Solutions

Working with experts in our sector and communities in finding innovative and affordable housing solutions.





Michele Bell
Chief Executive Officer

Jeffrey Adisam
Chief Operations Officer

Melissa Robbins
Sr. Executive Administrator

Scott Taylor
Director, Corporate Resources

Adriana Londono
Director of Finance

Fiona Smith
Sr. Manager Support Services

Heather Travis
Communications Manager

Sue Skinner
Manager, Property & Maintenance

Gareth Lloyd
Manager, Quality Assurance and Policy Development

Jennifer Morrow
Manager, Early Intervention Supports for Children (CLOSD & CLWD)

Sheryl Marshall
Manager, Family Support Services

Jeanie Chavarie
Manager, Support Services (BPAFL)

Melissa Mertineit
Manager, Supported Group Living (CLOSD)

Jodi Klerks
Manager, SIL and Intensive Supports (CLOSD)

Tammy Robertson
Manager, Community Participation (CLOSD & CLWD)

Jackie McCartney
Manager, Passport and Individualized Funding

Laura VanderHulst
Passport Funds Administrator (CLOSD)

John Ramage
Sr. Financial Analyst (CLOSD & BPAFL)

Chris Koch
Sr. Financial Analyst (CLWD)

Kim Jex
Sr. Finance and Payroll Administrator (CLOSD)

Mary Lou Whitcroft-McGarvey
Sr. Finance Administrator (CLOSD & BPAFL)

Carol McCauley
Payroll/HR Administrator (BPAFL)

Rachel Edgar
Human Resources Generalist

Mary Fee
Manager, Support Services (CLWD)

Rachael Fritsch
Administrative Assistant (CLWD)

Samantha Fanning
Administrative Assistant (CLOSD)



Community Snapshot



			<h2>Total</h2>
59 Employees	91 Employees	153 Employees	303 employees
146 People Supported	705 People Supported	870 People Supported	1721 people supported
4 Group Living Homes	10 Group Living Homes	9 Group Living Homes	23 Group Living Homes
80 Family Services Supports	388 Family Services Supports	619 Family Services Supports	1087 Family Services Supports
55 Passport Contracts	147 Passport Contracts	222 Passport Contracts	424 Passport contracts
1 New website	1 New website	1 New website	4 New websites Includes Tri Alliance
1 New Newsletter	2 New Newsletters	2 Newsletters	5 Newsletters distributed

Operational Updates

As back of house supports for our three agencies, Tri Alliance provides HR, Finance, Communications, and Operational supports. Each department works cross-functionally across the region to deliver the highest level of support, achieve operational excellence, and maximize efficiencies.

In the past year, our organization has demonstrated remarkable resilience and adaptability in navigating a rapidly evolving industry landscape. By leveraging synergies across our teams and fostering a culture of collaboration, we have not only maintained our operational excellence but have also begun to witness innovation and efficiencies created through the streamlining achieved with the creation of Tri Alliance.

This section highlights the key operational achievements, strategic partnerships, and initiatives that have enabled us to meet challenges head-on and continue delivering exceptional value to our stakeholders.

Operational Updates

Financial Services

This year, our unified financial team effectively managed the financial operations for the three agencies under our umbrella. By centralizing financial management, we have streamlined processes, reduced costs, and ensured consistent financial practices across all agencies.

- 2023/2024 budgets have been completed for the four agencies and CLOSD Foundation
- Interim report submitted to MCCSS for the three Agencies on November 9, 2023
- Year End financials completed for all three Agencies and CLOSD Foundation
- Audits completed for all three agencies and CLOSD foundation
- Year-end Financial reports for the three agencies submitted to MCCSS on June 30, 2024 and included in all agency's Annual Reports.
- Charitable returns submitted for the three agencies and CLOSD Foundation
- Implemented the financial aspect of the new software TIMMS for the three agencies to streamline processes and achieve efficiencies.

Efficiencies Achieved Through a Unified Financial Team

- **Cost Savings:** Consolidating financial operations under one team is leading to cost reductions, particularly in administrative overhead and operational expenses.
- **Process Optimization:** We are standardizing and automating financial processes, reducing manual effort and minimizing errors. This is leading to faster and more accurate financial reporting.
- **Consistency and Compliance:** Our unified approach ensures all agencies adhered to consistent financial policies and regulatory compliance, successfully passing all audits and reviews.

Impact on Agency Operations

- **Operational Efficiency:** The efficiencies gained through unified financial management have had a positive impact on the agencies' operations, allowing them to focus more on their core activities and less on administrative tasks.
- **Support for Strategic Initiatives:** Our financial management has enabled the agencies to pursue strategic initiatives and invest in growth opportunities, strengthening their overall impact.

Operational Updates

Human Resources

This year, our centralized Human Resources (HR) team has successfully managed the HR functions across the three agencies we support. By consolidating HR operations, we have enhanced efficiency, improved employee satisfaction, and ensured consistency in policies and practices.

- All Staff meetings were held for all three agencies in September and January
- Hosted a Tri Alliance all staff meeting in November
- Researched and implemented a Pension Plan for Tri Alliance employees
- Successful negotiation of collective bargaining for CLWD
- Continued focus on recruitment initiatives for all four agencies
- Actively participated in regional recruitment and employment networking.
- Radio campaign to drive local recruitment done across all three regions simultaneously, allowing us to deliver three recruitment campaigns for three agencies for one price.

Efficiencies Achieved Through a Unified HR Team

- **Cost Efficiency:** By centralizing HR functions, we reduced redundancies and streamlined operations, resulting in cost savings. Shared services, such as recruitment, training, and benefits administration, have been managed more efficiently under a unified team.
- **Standardization of Policies:** We have standardized HR policies and procedures across all agencies, ensuring consistency and compliance with legal requirements.

Impact on Agency Operations

- **Enhanced Organizational Culture:** Through cohesive HR management, we have reinforced a shared organizational culture that aligns with the values and goals of all agencies. This has strengthened collaboration and fostered a sense of community among employees.
- **Support for Strategic Objectives:** Our HR team has played a crucial role in aligning human capital with strategic objectives, ensuring that each agency is equipped with the talent and skills needed to achieve its mission.

Operational Updates

Communications

- Developed and successfully launched the Tri Alliance website in November of 2023, enhancing our digital presence and providing a unified platform for all agencies.
- Working collaboratively across all three agencies, new websites were launched in February 2024 for all three agencies.
- Organized and hosted Spaghetti Socials in all three communities, fostering community connections.
- Added LinkedIn to our suite of social media profiles for all agencies (including Tri Alliance).
- Maintained a regular posting schedule on LinkedIn, Instagram, and Facebook for all three agencies, effectively reaching our audience and keeping them informed.
- Newsletters: Introduced a community newsletter in both CLWD and BPACL where previously there were none.
- Supported the #5toSurvive social media campaign by Community Living Ontario across all platforms for all agencies.
- Contributed to recruitment efforts with regular social media posts and website updates.
- Completed the updated Medication Manual for CLOSD, and collaborated to finalize manuals for BPACL and CLWD, ensuring consistency and accuracy.
- Provided comprehensive support and materials for the AGMs of BPACL, CLWD, and CLOSD.
- Designed, developed, printed, and posted annual reports on agency websites. This involved creating summaries of each department's quarterly reports, drafting letters from the board president & CEO, and a unified Tri Alliance letter.
- Developed brochures for each agency on topics including feedback and complaint procedures, recruitment, and general 101-level information.
- In Progress: Finalizing brochures for all departments/services at each agency. This collaborative approach allows us to create three brochures simultaneously, resulting in significant cost savings and ensuring brand cohesion across all regions.

In Development:

- Crisis Communications Plan: Creating a comprehensive plan to ensure each agency is prepared for potential crises, with trained team members and updated resources in a crisis toolbox.
- Communications Strategy: Developing a strategy to provide consistent guidelines for using communication channels, understanding best practices, and supporting our strategic plan.
- Brand Strategy: Establishing consistent guidelines for representing the agencies across all platforms and communications.

This summary emphasizes the synergies achieved through collaborative efforts, highlighting the efficiencies and resource savings that benefit all three agencies.

Operational Updates

Compliance

Ensuring we are meeting Ministry compliance standards is vital to demonstrate we are providing the best quality support. By continuously training our staff and keeping our policies and procedures accurate and applicable to the work we do, we create an environment where our teams and the people we support are both empowered and safe. If issues deemed to be non-compliant do arise, addressing them swiftly is crucial to maintaining trust, safety, and the overall integrity of our operations. Regular reviews, hands-on coaching, and prompt corrective actions ensure that we continue to meet the highest standards of support.

CLOSD: June 2023

- Following this inspection, CLOSD was found to be non-compliant in 5 areas of 351 indicators, all of which were corrected within the allotted time

CLWD: December 2023

- Following this inspection, CLWD was found to be non-compliant in 4 areas of 351 indicators, all of which were corrected within the allotted time

BPACL: February 2024

- Following this inspection, BPACL was found to be non-compliant in 2 areas of 351 indicators, both of which were corrected within the allotted time

Operational Updates

Support Services

Over the past year, our Support Services teams have made significant strides in aligning efforts across all three agencies, leading to enhanced synergies and creating new opportunities for future growth and efficiency as we prepare for sector reform and the Journey to Belonging.

Key Achievements:

1. Re-Alignment of Manager Portfolios:

- We have successfully realigned the portfolios of our Managers to better support Supported Group Living (SGL), Supported Independent Living (SIL), Community Participation (CP), and Family Support Services. This alignment has allowed for better coordination and sharing of best practices, resulting in increased efficiencies, particularly in the areas of policies and processes.

2. Leadership Training:

- Comprehensive leadership training was provided to all supervisory teams across all three agencies. This initiative has strengthened leadership capacity, ensuring our teams are well-equipped to support our service goals.

3. Increased Supervisory Staff:

- We have expanded our supervisory staff, strategically aligning them with SIL, CP, IS, and SGL services. This has not only enhanced the support provided but has also enriched the content and delivery of our programming across all three agencies.

4. Regular Inter-Agency Collaboration:

- Support Services Managers meet bi-monthly across all agencies. These meetings have fostered closer collaboration, ensuring consistency in service delivery and sharing of resources.

5. Training Initiatives:

- Non-Violent Crisis Intervention (NVC) training has been utilized across all three agencies, reducing wait times for staff to receive this essential training.
- Medication training has been successfully rolled out in two agencies, with implementation in progress for the third.

continued on next page...

Operational Updates

Support Services

continued...

6. Fee-for-Service Structure:

- We are nearing completion of the work on a new Fee-for-Service structure, which will streamline and standardize our approach across the agencies and better prepare us for Journey to Belonging.

7. Passport Program Planning:

- Planning for the Passport Program is ongoing, with a targeted rollout across all three agencies. This will provide consistent and comprehensive support to those we support and their families.

Consistent Service Delivery:

Across all support services, we have maintained a high standard of care and engagement for those in Supported Group and Independent Living, Community Supports, and Family Services. Our focus on individualized support plans, skill development, medical care, and recreational activities has fostered a supportive and inclusive community environment.

Team Members



Leanne Hopkins, who celebrated 35 years with Community Living Owen Sound in June 2023 (with the last 2 years with Tri Alliance), retired from her position as Manager of Child and Family Services in February 2024. Leanne was looking forward to spending more time with her horses, increasing her participation in competitions, and enjoying more time with her family.



Deb Smith retired in May after celebrating 15 years with BPACL (with the last 2 years with Tri Alliance). Deb retired from her position as Manager of Quality Assurance and Policy Development in May of 2024. Deb said she was looking forward to spending more time with her grandchildren as well as returning to her robust gardening!



Diccon Garrett was with us in the role of Director of Operations for this past year and assumed the role of interim CEO from January to May before his retirement. Diccon and his family have moved to a beautiful hobby farm in the Maritimes. For those of you who are familiar with Diccon, this will not come as a surprise. Diccon has lived daringly and has worked in so many fascinating fields – Bassoon Player in an orchestra, helicopter pilot, transportation, and the last few decades in the developmental services field.

Team Members

Getting to know: Jeffrey Adisam DHSc., Chief Operating Officer



Jeffrey Adisam is an accomplished leader in the healthcare sector with a rich and diverse career spanning multiple roles and responsibilities across different regions and cultures. Originally from Ghana, Jeffrey's journey has taken him from Texas to Sudbury, and now to Owen Sound, where he continues to make a significant impact as part of the Tri Alliance team.

With a Doctorate in Health Science and a Master's in Management-Health Administration, Jeffrey brings a profound understanding of both the operational and strategic aspects of healthcare management. His global perspective and varied experiences enrich his leadership style, enabling him to navigate the complexities of healthcare across different settings.

What truly sets Jeffrey apart is not just his professional acumen but also his deep appreciation for community. The warmth and commitment of this community to supporting one another were key reasons Jeffrey was drawn here. He values the genuine care that permeates the team and the way everyone comes together to make a newcomer feel right at home.

Outside of work, Jeffrey is a family man through and through. He treasures spending time with his tight-knit family, who share a unique bond through their love of singing. Whether they're harmonizing together in the living room or taking their musical talents on a scenic walk, Jeffrey and his family are always having a blast. He also enjoys cooking, often whipping up delicious meals that bring everyone together around the table.

Jeffrey is deeply passionate about making a positive difference in people's lives. Whether it's lending a helping hand to a neighbour or spreading joy in the community, Jeffrey's heart is set on making waves and spreading smiles wherever he goes.

As our Chief Operating Officer, Jeffrey is poised to lead our organization into a future of continued growth and success. His vision and dedication to quality care, informed by his diverse background and experiences, will undoubtedly contribute to our ongoing mission to provide exceptional services. With Jeffrey at the helm, we are confident in our ability to meet the evolving needs of our community and stakeholders.

Team Members

Getting to know: Scott Taylor, Director of Corporate Resources

In my short time here at Tri Alliance, I've been deeply moved by the supportive and inclusive environment. The commitment to enhancing the quality of life for individuals with developmental disabilities is truly inspiring. The sense of community and the dedication of the staff, who work tirelessly with compassion and care, create a warm and nurturing atmosphere that I appreciate immensely.

Having spent a lot of time away from home since arriving in Canada in 2008, family time is incredibly precious to me. I cherish every moment with my wonderful wife and amazing teenage daughter. Whether we are talking, walking, laughing, playing games, or traveling together, we make the most of our time, often with our dog in tow.

If I could choose to do anything for a day, I'd love to wake up with superhero powers, dashing through cities and towns at lightning speed to deliver medical supplies, put out fires, and stop crime. I'd rebuild entire communities, run across oceans to deliver aid, and still have time to enjoy a sunset on the other side of the world with my family.

When it comes to sports, my heart is set on rugby. Unlike soccer, which seems to involve a lot of dramatic dives and arguments with referees, rugby is all about sheer strength, strategy, and teamwork. The players face intense physical challenges and keep going without any theatrics, embodying true guts and glory on the field.

I'm excited to be part of the Community Living and Tri Alliance team, and I look forward to contributing to our mission and making a positive impact together.






Thank You

Our vision of an inclusive community begins with our team.

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