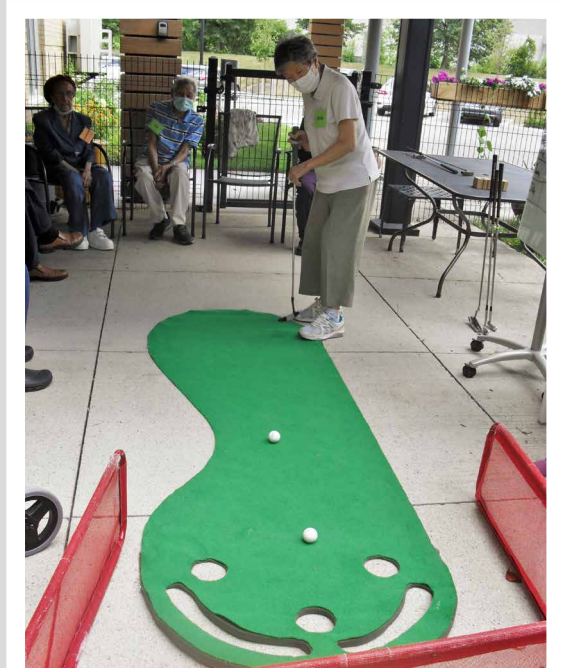


UNIONVILLE HOME SOCIETY

THE BEST IS YET TO COME

ANNUAL REPORT 2022 – 2023





While we have already
accomplished so much, we believe
the best is yet to come
for our campus of care.

MISSION

Enhancing the experience of aging,
one person at a time

VISION

A progressive community where older adults
thrive; age well and live better

VALUES

Caring Genuinely and Passionately
Respecting each Person
Serving with Integrity and Commitment
Advancing Quality and Innovation
Connecting Communities

SENIOR LEADERSHIP TEAM

Abby Katz Starr, *President and CEO* • Julie Horne, *CFO & Privacy Officer* • Terry Collins, *Union Villa Administrator*
Claire Chester, *Human Resources and Customer Service Director* • Maria Dimson, *Development and Communications*
Director • Sameer Singh, *Environmental Services Director* • Alex Li, *Administrative Assistant*

A MESSAGE FROM OUR PRESIDENT & CEO

2022 was our first fiscal year since the successful amalgamation of New Unionville Home Society and Unionville Home Society. And with this change, we reopened in the post-pandemic world (along with the rest of the province). We introduced new projects, recalibrated strategic goals, and made progress on our commitment to be known for our excellence in seniors care, delivering re-invigorated programs and outings for our residents.

We are so grateful for the hard work and sacrifice that have brought us to this moment, and we have so many people to thank for their tireless efforts: our Board members, our staff, and our volunteers. Each of you played a crucial role in bringing our campus of care to where we are now, ready to seize upon the opportunities ahead – thank you.

One of the most critical ways that we are advancing our mission is through our UHS Strategic Plan. While our Vision, Mission and Values will never cease to guide our everyday actions and decisions, our Strategic Plan refresh is providing a dynamic roadmap from now until 2025.

How did we get here? This past year, we took a step back and examined where we have been and where we want to go for the next two years of our Strategic Plan. Through this holistic process, we have been rejuvenated and have a clearer vision for the next two years. Our goals are stronger, refined, and targeted; and we engaged our entire community in this refresh. As a team and a community, we are positioning UHS as a leader in delivering the highest quality care to seniors in our region.

In the fiscal year ending March 31, 2023, I am proud to report that we delivered on many of our goals, including:

- **HERITAGE VILLAGE** – After providing quality seniors housing since 1980, our Heritage Village bungalows closed, and we supported our long-time residents in their transition to the brand-new Unionville Commons seniors building located on our north campus.



- **MODERNIZATION** – In alignment with our Strategic Plan, we continued to modernize and upgrade our technology to serve our campus faster and better. We are on the road to digitizing resident information and using medical applications to make sharing crucial information safer, more secure, and easier to understand for families.
- **POST-SECONDARY PARTNERSHIPS** – We strengthened our partnerships with Seneca College and York University. An example of this is our proposal to have Seneca students participate in a Design Jam to build a solution that would help bridge communications between front-line staff and families in long-term care.

With all the amazing things we have achieved together over the past year, it is heartwarming to realize that we have come so far as a vibrant campus and a unified community of care. And with so many exciting things to look forward to in the 2024 fiscal year, I just know the best is yet to come!

ABBY KATZ STARR, *President & CEO*

A MESSAGE FROM OUR UNIONVILLE HOME SOCIETY BOARD CHAIR

I wanted to start off this year's annual address by thanking our extremely hardworking and dedicated staff. They provide compassionate care, emotional and physical support, and more to our clients each and every day. I truly believe that our staff make Unionville Home Society the vibrant campus of care we are today.

This year has been very busy for our management team, and we have been successful on several major initiatives. We have implemented a new, more efficient accounting and finance system that will provide a significant improvement to our month-end procedures and reporting capabilities. This was a heavy lift by our management and finance team, but worth the investment as it will allow the organization to focus more resources on our clients and the care that they deserve.

The board alongside senior leadership, has spent the better part of this past year working on refreshing the current five-year Strategic Plan for our campus. We recognized the need for a greater focus on new technologies and talent acquisition. These priorities among others will drive the final 2 years of the current Plan.



The board is close to finalizing the sale of its excess land putting us in a better position to make strategic investments in our campus infrastructure. This exciting development will allow greater control of UHS's future and enhance our ability to innovate and modernize our long-term care and community services.

Lastly, I would like to thank all our clients, their families and the volunteers for choosing UHS - a campus where seniors can age well and live better.

PHILIP GUNN, UHS Board Chair

It is coming up to 10 years since I joined the Foundation Board and took on the responsibility of Chair, and I must say it has been an honour to be part of the growth in donor engagement and funds raised each year. Working with the staff and an incredible Board has only made me a better person and more attuned to my community responsibilities. We continue to strive to raise the money for all our many needs at the Villa, and I am proud to say we do so with integrity so as not to go against the principles of our great organization. Moving ahead, the Foundation is up for continued success.



PATRICK O'HANLON
Board Chair, Unionville Home Society Foundation

This past year, I was honoured to take on the role of Chair at Wyndham Gardens. The Wyndham Board is comprised of committed community members and includes wonderful representatives who reside at Wyndham. The staff here have done an excellent job of attending to the needs of the residents ensuring a safe, and desirable place to live and call home. There have been a number of significant building projects completed in the past year which is reflective of a well-managed life-lease building. Together with my fellow Board members, we dedicate our time and efforts to provide strategic direction to ensure a healthy living environment for all.



DEBRA AMBROSE
Board Chair, Wyndham Gardens Apartments of Unionville



UNIONVILLE HOME SOCIETY

UNION VILLA LONG-TERM CARE

It has been another busy year for Union Villa as we continue to recover from the pandemic and return our business to normal. The long-term care sector is changing from a reactive to a proactive period as we continue to assess the new Fixing Long-Term Care Act 2021 and implement the necessary changes to the Act and its regulations. These changes affect all areas of the home, including care initiatives, physical surroundings and the management of the Home. While it is very labour intensive, it also gives us a roadmap for improvements and growth as we strive to provide the best care possible.

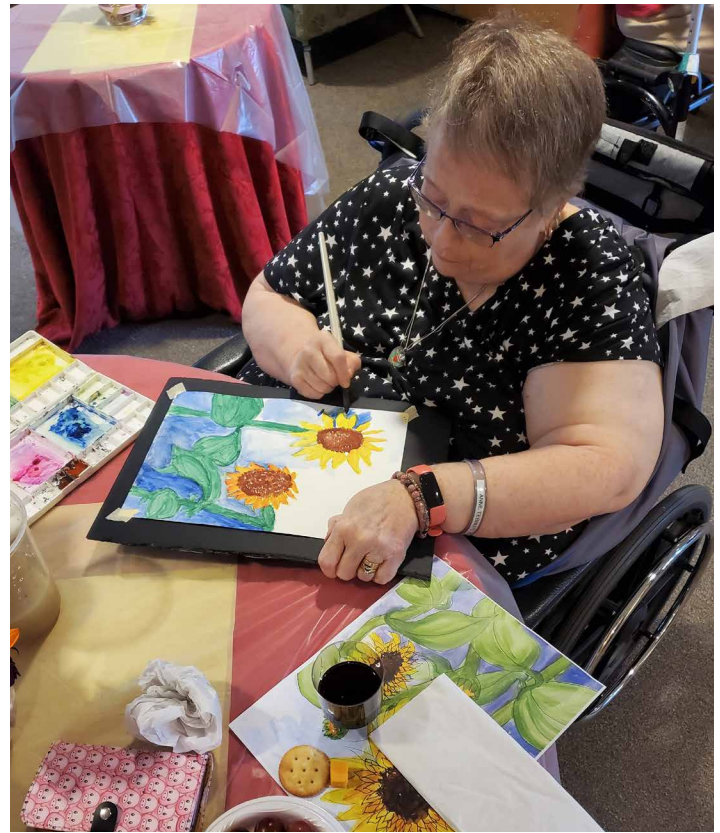
We have taken advantage of some significant funding opportunities provided by the Ministry for food cost, staff education and improved staffing levels for Personal Support Workers, Recreation Therapists and Dietitian hours. There was also a special grant to assist with the air conditioning of all resident bedrooms and a grant from the Royal Canadian Legion to purchase some pressure relief mattresses with air pumps.

Our focus on quality resident care continues on many different fronts. With the recruitment of our Director for IPAC and Inspection Protocols and our Director of Care, assessment of all resident programs is underway to ensure the utilization of best practices and compliance with Ministry standards. Staff training has been completed for Skin and Wound Care, IPAC, Palliative Care, Health and Safety Certification, Quality and Risk Management.

With the lifting of most of the Covid restrictions, our IPAC program is still front and centre with education, auditing and symptom surveillance. Tracking tools have been updated to allow for easier tracking of all infections. Our IPAC Director is looking at our entire program with fresh eyes to make suggestions for improvements and to streamline some of our processes. Collaboration with York Region Public Health and the Oak Valley Hospital IPAC Hub is also continuing.

Throughout the past year, we have made some improvements to our equipment. New chairs were purchased for every resident room. iPads have been leased for point-of-care documentation by PSWs. New shower chairs, bariatric equipment, treatment carts and an electronic medication cart have also been purchased. Enhancements have been made to our electronic resident chart system to facilitate the identification and treatment of changes in resident status.

Even with the challenges of the past few years, our amazing staff have risen to the occasion and provided exemplary service to our residents. We are so proud of their dedication and commitment. The support from our residents and family members has also played a vital role in our success through their partnership to make Union Villa a valued member of the community and the long-term care sector.



RESIDENT CENTERED HIGHLIGHTS:

- IPAC** – We have invested in our team’s IPAC support which will have positive impact on the long-term health of both residents and staff. Our new DOC brings significant experience in IPAC to her role and our new Director of IPAC and Inspection Protocols brings a wealth of experience as both an RN in long-term care and an employee at the IPAC Hub at Oak Valley Health.
- RECREATION** – We boosted our Recreation staffing to a full time recreation therapist on each unit as well as a part-time RT on each floor. Previously there was one staff member per floor. This has allowed us to introduce many great new programs and special events and to deliver more focused one-on-one recreation therapy to our residents. New programs such as In Your Seat Fitness, the Villa Voices Choir, and low-impact Zumba have been well-received by the residents.
- FACILITIES** – With grant funds that UHS received from the federal government, we made much needed upgrades to our building, including outfitting ground-floor rooms in Union Villa with automated push-button doors, and upgrading all resident rooms with fully controlled air conditioning.

2022 RESIDENT/FAMILY SATISFACTION SURVEY

“How would you rate our home overall?”

90%

Residents rated as excellent/very good/good

98%

Family rated as excellent/very good/ good

“Would you recommend Union Villa to a family member or friend needing long term care?”

87%

Residents said Yes

98%

Family said Yes

ADULT DAY PROGRAM

We are thrilled to have experienced a full year of opening, back to regular and uninterrupted ADP programming. While it was a slow return with initially only 5 clients/day, it did not take long to double our daily participant counts. Thanks to our resilient staff and innovative programming, ADP clients have returned to a service they have come to know and enjoy, often referenced by clients as their "Seniors Club". We have

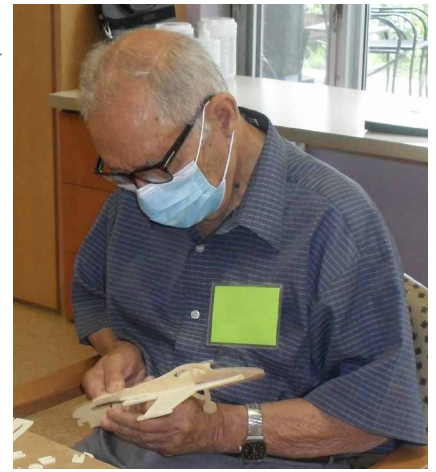
"My mum looks forward to her day at the ADP and she's had the opportunity to interact with other seniors and participate in exercise classes and activities. The staff are excellent and enthusiastic and just so nice to the seniors in the program. For us it's a safe space to place my mum and gives my husband and I a break for a few hours."

- Testimonial from an ADP client's family

learned many lessons and each one is filled with hope and excitement for the future.

The ADP return to in-person brought new programs like drumming circles, handwriting sessions, and crafting workshops. Each one provides significant therapeutic benefits and social experiences. We also welcomed a Social Service Worker placement student to our program in the Spring.

We are committed to the climb back to full capacity, and continuing to offer hybrid options to ensure greater inclusivity of our community clients. Our priority remains intact with a pledge to ensure a safe, vibrant, and social community for all our clients.



GERIATRIC OUTREACH PROGRAM

The Southeast Geriatric Outreach Team (SEGOT) completed their successful office move out of our back campus into available office space at Wyndham Gardens. It took many hands to make it happen but under a tight timeline it went successfully and the team has now settled into their new home on the UHS campus.

SEGOT clinicians provide expert consultation centered around comprehensive geriatric assessments. Our staff provide an 'eyes in the home' perspective by taking a

critical look in the home of those who are declining.

The team can prevent disability and restore frail seniors to their highest possible level of functioning in collaboration with primary care physicians, home and community care and long-term care homes. With partnerships, networking and representation at the Ontario Health Team tables, this service remains an invaluable contributor to a seniors' health navigation journey.

DIGITAL COMMUNICATIONS

SOCIAL MEDIA ENGAGEMENT



29% increase
in followers



28% increase
in followers



29% increase
in followers



18% increase
in followers

960
total posts

showcasing activities, appreciating our staff, promoting fundraisers and positioning UHS as a leader in seniors' care

EMAIL MARKETING

216
Email blasts



60% Open rate
(21% higher open rate than industry average)



UNIONVILLE COMMUNITY CENTRE FOR SENIORS (UCCS)

This past fiscal year was UCCS's last at 17 Anna Russell Way, our home for the past 42 years. As such, our UCCS team worked relentlessly to ensure that our membership continued to see value in our membership, even knowing that our original location was to be vacated on March 15, 2023.

There was no winding down of programs during this fiscal. UCCS offered more programs in 2022-23 than in the previous fiscal year and our membership thrived with referrals. We continued to deliver special events, health fairs, and volunteer-driven bazaars over and above our regular programming.

Countless staff hours were allocated in this fiscal to researching affordable temporary programs sites within the local community, organizing our move of assets, and ensuring that our members and volunteers were kept informed at every stage of our relocation.

On March 20, 2023, we relocated our centre to two temporary sites within walking distance from the original UCCS site at 17 Anna Russell Way. Through it all, we have continued to support the well-being of seniors in our community.



"The community centre is a haven for the seniors that live around here. The programs, like bowling, trivia, and coffee hour, keep me active and laughing. Everyone is always very friendly and the people that run it are the best around."

-Diana, UCCS Member for 5+ years

HIGHLIGHTS:

- UCCS hosted a Seniors Active Living Fair in January 2023, with support from the Older Adult Centres Association of Ontario (OACAO) and the Ministry for Seniors and Accessibility. This event featured a trade show with 24 partner agencies and eight (8) workshops. Over 120 local seniors, caregivers, and family members attended this event.
- In February 2023, UCCS piloted a volunteer training program (Seniors Supporting Seniors) targeting new and seasoned volunteers 55+. This initiative is supported by a grant from the Ministry for Seniors and Accessibility.
- In 2022-23, UCCS hosted 14 special events, from outdoor BBQs to themed dinners, an Open House luncheon to recruit new members, and more. Our final special event at 17 Anna Russell Way was A Trip Down Memory Lane, complete with memorabilia spanning 40+ years of serving seniors.

1012 programs and events, online, in-person and hybrid, for a total of 2266 hours



47% increase in new memberships

92% Retention rate



32 core volunteers put in over 900 hours to help make our program and events a success



OUR MOST VALUABLE ASSETS – OUR PEOPLE

- Over 80 new staff joined our team this fiscal year in all areas of operation
- 9 summer employees were recruited from funding provided by the federal and provincial governments
- New hire orientation and onboarding was revamped to provide more comprehensive training
- Implemented a new management training program focused on collective bargaining, interview skills and performance management
- Launched an employee referral program which has resulted in roughly 20% of our new staff being referred to us by friends and family

Fostering a Learning Environment and Mentoring Future Leaders:

UHS has developed 18 affiliation agreements with postsecondary institutions including universities, colleges and York Region District School Board Adult Continuing Education. As we continue to position UHS as a preferred partner to post-secondary institutions, we expanded our placements to include PSW, RPN, RN, SSW and Recreation Therapists. Last fiscal, we only provided placements to PSW students.

With most RPNs and PSWs graduating from a college program, our placement program is crucial to hiring and retaining top talent for our residents.

This fiscal year marks the first anniversary of the PSW I:I Mentorship Program initiative, a cross-department effort to create a vibrant workplace for PSW placement students.

We are pleased to report that the positive feedback from each of the students has been consistent: the program provides them with greater understanding of what to expect during placement, increasing their comfort in caring for residents and confidence in choosing this sector for their career.



67 Placement students hosted

80%+ Number of students in the PSW stream



VOLUNTEER ENGAGEMENT



After almost 2 years of asking our volunteers to stay home, we were pleased to see a significant increase in volunteers re-engaged with our clients and re-connected with our staff.

104
Active volunteers

62%
Increase from previous fiscal



2863
Volunteer hours

227%
increase from previous fiscal



WYNDHAM GARDENS APARTMENTS OF UNIONVILLE

This fiscal year was the year to get back on track with numerous improvements made to the building, both inside and out, that were put on hold during the pandemic. These priorities ensured a safe and healthy housing environment for WG residents.

For those living here, the physical spaces provide all that's needed in a home but the greatest benefit is the comradery that exists in this life-lease apartment building resulting from weekly coffee hours, to monthly dinners and neighbours who are always there to help and comfort one another.



ENHANCEMENTS INCLUDED:

- Removing the outdoor fountain and replacing with increased outdoor gathering space.
- Replacing the rotted retaining walls which were a hazard with armour stone that not only enhances the buildings appearance but will limit erosion of surrounding soil.
- Windows and patio doors were replaced in common areas to reduce noise, improve energy efficiency and overall appearance of spaces.
- Waterproofing top floor terraces to protect the space underneath the balconies from water ingress damage.
- Replacement of lamp posts to improve the light source in the parking areas near the garage entrance.
- Addition of isolation valves to ensure that main water is never turned off to repair plumbing to individual suites.

"Wyndham Gardens is my sanctuary, with great neighbours who have become friends. We have very committed volunteers who organize events that celebrate our different cultures, and holidays. Special thanks to the staff here who take good care of us and our building – thank you to the Housing Manager Linda and the maintenance team Alberto, Darwin and others."

– Peter D., Wyndham Gardens Resident since 2017



UNIONVILLE HOME SOCIETY FOUNDATION

It was a year of “welcome back” with all three signature fundraisers on site at Angus Glen Golf Club and reaching full participation and financial goals – Garden by the Greens in April, Unionville Charity Golf Tournament in June and the Union Villa Dinner Party in November.

Our fundraising event volunteers were excited to resume their roles as stewards and committee members while our sponsors and supporters showed no hesitation in confirming their philanthropic leadership.

The Foundation experienced an increase in memorial giving which is a testament to the care that our residents received while they were in our care.

While there was no downtime for Foundation staff, an important initiative took place which saw the restructuring of our current Foundation Board to focus on governance and strategic planning. This paved the way to introduce a more “hands-on” fundraising cabinet model with members focusing on building a greater

donor network, supporting special events and future capital campaigns. We are currently working on terms of reference for the Cabinet of Ambassadors with recruitment of members to follow.

The Foundation Board and the upcoming Cabinet will work closely together as they are both essential for our organization’s success, creating a solid foundation for growth to serve the ever changing needs of our seniors community.

FY23 DONATION STATISTICS*



529
Number
of donors

72% increase
from last fiscal



746
Number
of gifts

66% increase
from last fiscal

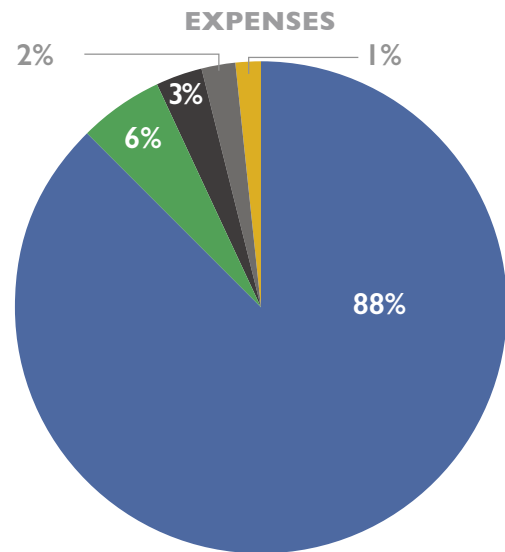
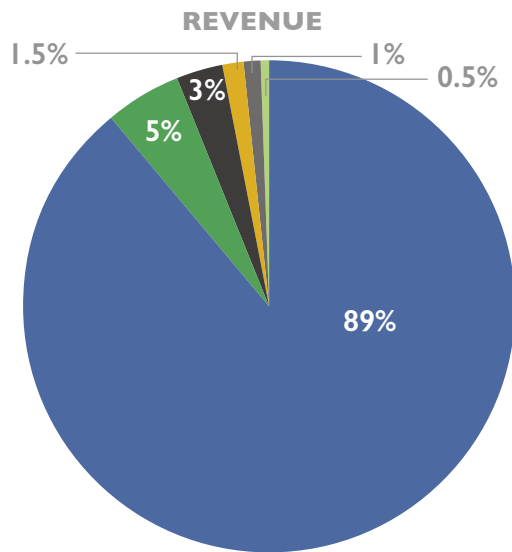
*April 1 2022 - March 31 2023

2022-2023 FINANCIAL STATEMENT SUMMARIES (UNAUDITED)

Audited financial statements are available at www.uhs.on.ca.

UNIONVILLE HOME SOCIETY

RESULTS OF OPERATIONS



Union Villa LTC	\$16,963,736
Heritage Village and UCCS	953,638
Community Support Services Programs	566,853
Geriatric Outreach Program	290,866
Administrative services cost recovery	226,692
Investment income and other	61,461
Total Revenue:	\$ 19,063,246

Union Villa LTC expenses	\$ 17,988,765
Heritage Village and UCCS expenses	1,092,592
Community Support Services Programs expenses	636,057
Administrative services	485,703
Geriatric Outreach Program	290,866
Total Expenses:	\$ 20,493,983

Deficiency of revenue over expenses for the year: (\$ 1,430,737)

FINANCIAL POSITION

ASSETS

Current assets	\$ 3,721,956
Long-term investments	125,000
Capital assets, net	7,555,251
Total Assets:	\$ 11,402,207

LIABILITIES & NET ASSETS

Current liabilities	\$ 3,915,107
Long-term liabilities	7,203,551
Net assets	283,549
Total Liabilities & Net Assets:	\$ 11,402,207

These summary financial statements are unaudited. The audited statements are available at www.uhs.on.ca.

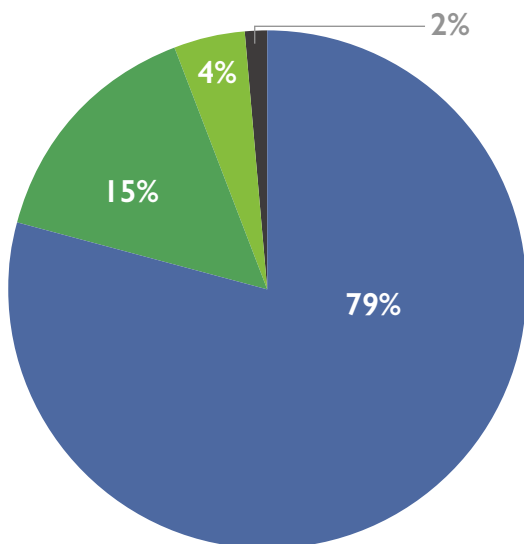
BOARD OF DIRECTORS

Philip Gunn, *Chair* • Phillip Enright, *Vice Chair* • Lyndsey McIntyre, *Treasurer*
 Glenn Crosby, *IPC* • Debra Ambrose • Tara Clucas • Paul Cousens • Tracey Deline
 Dan Horchik • Audrey Jamieson • Ted Madden • Andy Taylor • Michelle Tidball
 Blair Tullis • Samantha van Velzen

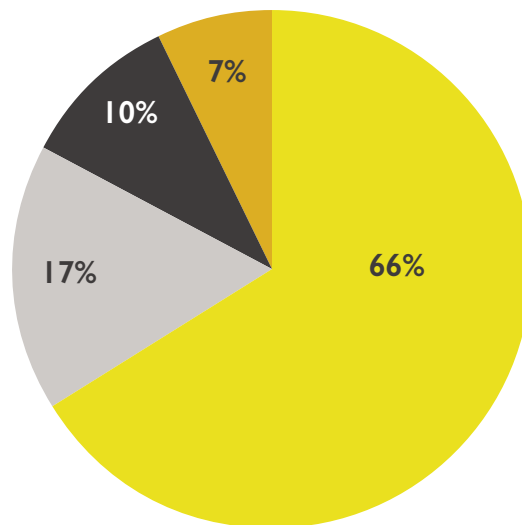
WYNDHAM GARDENS APARTMENTS OF UNIONVILLE

RESULTS OF OPERATIONS

REVENUE



EXPENSES



Maintenance fees	\$ 1,390,033
Re-leasing commission	262,750
Interest and other income	79,230
Capital levy	38,199
Total Revenue:	\$ 1,770,212

Building operations	\$ 1,263,406
Administrative	317,111
Salaries and benefits	192,287
Re-leasing expense	136,098
Total Expenses:	\$ 1,908,902

Deficiency of revenue over expenses for the year: (\$ 138,690)

FINANCIAL POSITION

ASSETS

Current assets	\$ 1,715,304
Long-term investments	565,000
Capital assets, net	4,892,647
Total Assets:	\$ 7,172,951

LIABILITIES & NET ASSETS

Current liabilities	\$ 296,120
Net assets	6,876,831
Total Liabilities & Net Assets:	\$ 7,172,951

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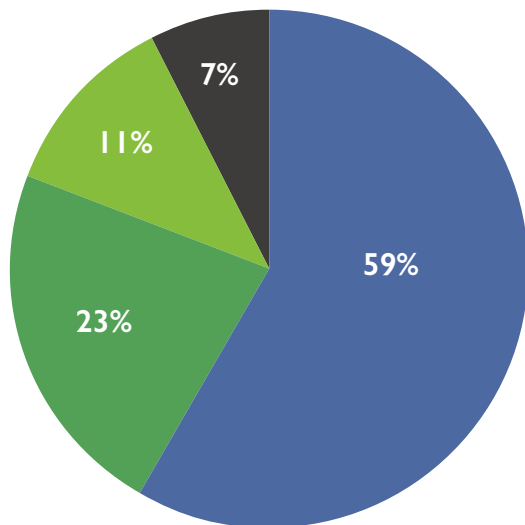
BOARD OF DIRECTORS

Debra Ambrose, *Chair* • Blair Tullis, *Vice Chair* • Samantha van Velzen, *Treasurer*
Tracey Deline • Astley Dennis • Ruth Harvilla

UNIONVILLE HOME SOCIETY FOUNDATION

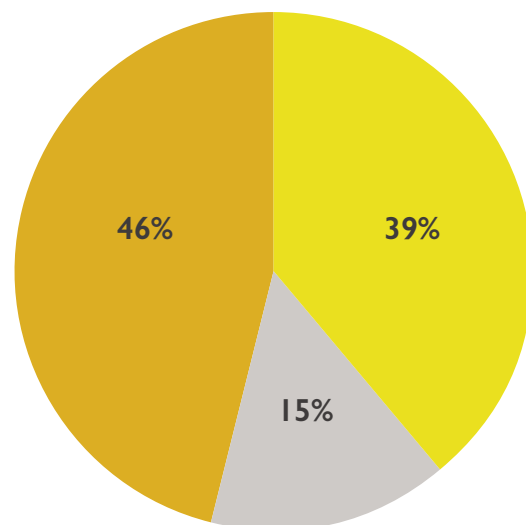
RESULTS OF OPERATIONS

REVENUE



Fundraising events revenue	\$ 263,336
Externally restricted donations and bequests	101,449
Donations and bequests	52,155
Investment and other income	33,129
Total Revenue:	\$ 450,069

EXPENSES



Fundraising events and charitable activities	\$ 157,489
Office and administrative	60,385
Donation allocations to UHS	
Resident care and comfort	
Nursing equipment	
Recreation supplies and equipment	184,368
Adult Day Program activities	
UCCS supplies and events	
Total Expenses:	\$ 402,242
Excess of revenue over expenses for the year:	\$ 47,827

FINANCIAL POSITION

ASSETS

Current assets	\$ 1,033,804
Long-term assets	75,000
Total Assets:	\$ 1,108,804

LIABILITIES & NET ASSETS

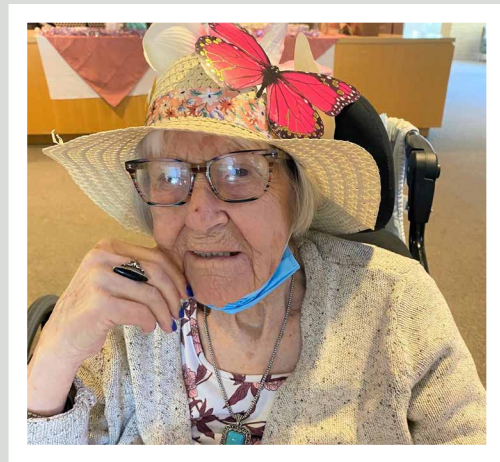
Current liabilities	\$ 44,625
Externally restricted net assets	264,960
Unrestricted net assets	799,219
Total Liabilities & Net Assets:	\$ 1,108,804

These summary financial statements are unaudited. The audited statements are available at www.uhs.on.ca.

BOARD OF DIRECTORS

Patrick O'Hanlon, *Chair* • Audrey Jamieson, *Vice Chair* • Amaar Naqi, *Treasurer*
Keith Chang • Tara Clucas • Jim Cochrane • Ted Madden • Santo Natale

HELPING SENIORS AGE WELL AND LIVE BETTER





SPECIAL THANKS

Our success in supporting the wellness, independence, quality of life, and self-determination of seniors in our community relies on the dedication of our Board of Directors, staff, volunteers, donors, resident and tenant associations, and the Resident and Family Councils.

Thank you for your commitment to serving our community with integrity.



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