



OAK BAY VOLUNTEER SERVICES
ANNUAL REPORT

2023-2024

A Community of Helping Hands

A Year in Review

**New Year, New
Leadership**

**Financial Trends
and Reports**

**Community,
Connections, and
Celebrations**



It is with the utmost gratitude that Oak Bay Volunteer Services operates on the unceded lands cared for by the WSÁNEĆ (Saanich), lək̓ʷəŋən (Songhees), and Xwsepsum (Esquimalt) peoples of the Coast Salish Nation.

Supporter Spotlight

PROUD SUPPORTER SINCE 1977

OAK BAY HAS BEEN A STRONG ADVOCATE FOR OBVS SINCE THE BEGINNING. IN ADDITION TO THEIR SUPPORT THROUGH VOLUNTEERING AND YEARLY COMMUNITY GRANTS, THEY GENEROUSLY OFFER OFFICE SPACE AS AN IN-KIND CONTRIBUTION.

DISTRICT OF
OAK  BAY

**THANK YOU FOR
YOUR TIRELESS
SUPPORT!**

Oak Bay Volunteer Services

Mission

To enable Oak Bay residents to maintain or improve their independence and connection to the community through the provision of support services that also engender strong relationships and lasting human connections.

Vision

To ensure Oak Bay residents are supported, valued and connected.

Values

- Inclusive and approachable
- Respectful and compassionate
- Proactive and responsive
- Collaborative and cooperative
- Dependable and accountable

About Our Staff

Executive Director

Kara Udell

Volunteer Coordinator

Ruth Platts

Administrative Coordinator

Jaimie Sumner

Outreach and Services Coordinator

Anna Mackay

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Meet our 2024 award recipients



Letter from our Executive Director

This year has been full of new opportunities, connections, and welcomed surprises. The most wonderful of which, for me, has been the opportunity to step into leadership here at Oak Bay Volunteer Services.

I want to express my sincerest gratitude for your continued support and belief in our mission. Without your unwavering commitment, it would be impossible for us to achieve the impact we've had over the past year. I am genuinely humbled by your trust in our organization and the direct impact your contributions have on our ability to fulfill our purpose.

Oak Bay Volunteer Services has always prioritized the needs of our community, filling the gaps as we grow. Throughout the past year, we have focused on improving and expanding our programs, advocating for change, and mobilizing resources to better serve our neighbors in Oak Bay. We believe that by connecting deeply with our community, we can better understand their needs and work towards solutions that make a lasting impact.



In our commitment to transparency and accountability, we have enclosed detailed financial statements, program impact highlights, and updates from leadership. These reports provide a comprehensive picture of how your contributions have enabled us to create sustainable and meaningful change. We believe in being fully open and transparent about our activities and the impact we are making.

As we look to the future, we are energized by the opportunities that lie before us. As we enter this new year, our commitment to making a meaningful impact remains unwavering. We are driven to refine and expand our initiatives, amplify our outreach efforts, and forge new partnerships with individuals and organizations who share our vision. Together, we are confident that we can make an even greater difference in our community.

On behalf of the entire Oak Bay Volunteer Services team, I extend my deepest gratitude to each and every one of you. Your steadfast support has been the driving force behind our successes, and we will never take your trust and belief in our work for granted. In this 47th year of service, we look forward to deepening our community connections and expanding our scope of service in the years to come.

Thank you again for your continued support, dedication, and partnership. Together, we will see a future where isolation is reduced, connections flourish, and independent living is made more accessible for all.

Kara Udell

**Executive Director
Oak Bay Volunteer Services**



**"THERE IS NO POWER FOR CHANGE
GREATER THAN A COMMUNITY
DISCOVERING WHAT IT CARES ABOUT."
- MARGARET J. WHEATLEY -**



2023-2024 *Volunteer Update*

An annual update showcasing the latest developments and highlights from our Volunteer department, offering a glimpse into the remarkable work our volunteers have undertaken this year.



By Ruth Platts | Volunteer Coordinator



A heartfelt thank you to our amazing volunteers who generously contributed over 7000 hours of service last year! I continue to be touched by their kindness, dedication, and enthusiasm as they share their time and talents.

During the past year, we introduced three new volunteer roles: Cultural Companion, Packing and Sorting Volunteer, and Destination Walker. Our rosters are still growing, so I'm excited to hear from anyone interested in these positions.

I'm also thrilled to welcome new applicants for other roles! We're especially in need of Drivers but have a wide variety of opportunities available. Don't hesitate to reach out to me to learn more.

Thank you once again to all our volunteers. Your contributions make a world of difference, and we could not do it without you!

Best Wishes,

Ruth

Ruth Platts
Volunteer Coordinator



COMMUNITY

Engagement

VOLUNTEERS HAVE ALWAYS BEEN THE LIFEBLOOD OF THIS ORGANIZATION. THIS YEAR, OBVS CONTINUED TO FOSTER A STRONG SENSE OF COMMUNITY WITH OUR VOLUNTEERS, AND TOGETHER, WE'VE MADE A DIFFERENCE IN THE LIVES OF OAK BAY RESIDENTS.

National Volunteer Week Ice Cream Social

OBVS organized a delightful ice cream social at Windsor Park to celebrate National Volunteer Week. The event was a sweet treat, where we gathered to recognize and honor our volunteers, whose selfless contributions make a significant difference in the lives of others. The sunlit day, filled with laughter and the sweet aroma of ice cream favorites, created a sense of unity and gratitude that exemplified the power of volunteering. We would like to sincerely thank Oak Bay Recreation for allowing us to use their space for this event.

Oak Bay Tea Party Parade

OBVS once again participated in the Oak Bay Tea Party Parade, showcasing the enthusiasm and dedication of our volunteers. We marched proudly in our bold pink and blue shirts. Our presence in the parade demonstrated a strong sense of pride and camaraderie within our organization. As onlookers cheered and waved, the parade served as a reminder of how volunteering enhances individual lives and uplifts and strengthens the collective spirit of the entire Oak Bay community.

Learning Sessions

At OBVS, we believe in continuous learning and creating inclusive environments. This year, we organized learning sessions for our volunteers focusing on two crucial topics: establishing boundaries and working with people of different abilities. With the invaluable guidance of Erin Davis from the Disability Resource Centre, our volunteers gained insights into fostering respectful interactions with individuals with diverse abilities. Later in the year, Clinical Counsellor Shannon Husk walked us through establishing healthy personal boundaries with all those we serve. These sessions reflected OBVS's commitment to empowering our volunteers with the knowledge and skills to create a supportive and inclusive community.

Holiday Party

As the year came to a close, OBVS took the opportunity to celebrate our volunteers' hard work and dedication with a joyous December Holiday Party. This year, the festivities were held upstairs in the Monterey Recreation Centre, creating a warm and festive atmosphere that captured the magic of the holiday season. Volunteers and their loved ones came together, sharing stories, laughter, and the joy of being part of a community that values their contributions. The December Holiday Party served as a heartfelt thank you, recognizing the essential role our volunteers play throughout the year.



**“NO ONE IS MORE CHERISHED IN THIS
WORLD THAN SOMEONE WHO LIGHTENS
THE BURDEN OF ANOTHER.
THANK YOU.”**

~JOSEPH ADDISON~



OUTREACH AND SERVICES

Reflections

By Anna Mackay
Outreach and Services Coordinator

As I reflect on my first six months with OBVS, I am full of gratitude. Gratitude for Kara, Ruth, and Jaimie, who encourage and support me and make the office such a warm and welcoming space. Gratitude for our clients, who give me the privilege of listening to their stories and welcoming me into their homes. Most of all, I feel gratitude for our extraordinary team of volunteers, who give their time, energy, and support to our organization. I am always in awe of their commitment to help our little community. With a background in Gerontology and a passion for allowing people the opportunity to age in place, I feel as though I could not be working with a better organization.

2024 is already bringing us new and exciting opportunities. We have partnered with the Eldercare Foundation to distribute robotic companion pets to residents of Oak Bay. These pets help decrease rates of loneliness and feelings of social isolation. We have also been able to send a number of clients and volunteers to the symphony through our Cultural Companion Program, with the help of the Victoria Symphony and funding from a private family foundation. Clients and volunteers have been able to share this wonderful experience and connect over their enjoyment of the music. These offerings only scratch the surface of OBVS' present and future programming, and I am thrilled to be a part of it all!

Thank you to all who help OBVS create a community where residents feel supported, safe, and connected. I look forward to continuing our important work with the support of staff and volunteers.

Best,

Anna



Community engagement and volunteerism have always been central to Oak Bay Volunteer Services (OBVS). This year, our organization has continued to foster a strong sense of community and make a difference in the lives of Oak Bay residents.

Introducing New Services

We are thrilled to introduce new services at Oak Bay Volunteer Services (OBVS) that have enhanced our support to Oak Bay residents. Our Cultural Companions initiative allows individuals to engage with arts and cultural activities while making meaningful connections with others. Additionally, our Destination Walks program offers the opportunity for participants to embark on purposeful journeys with our dedicated volunteers. Finally, our Packing and Sorting service creates opportunities to assist with small organization tasks, like decluttering, organizing, and preparing items for donation. These new services have expanded our offerings and provided OBVS opportunities to better serve our community.

Relaunch of the Willow Tree Newsletter

Late last fall, we relaunched our semi-annual client newsletter, *The Willow Tree*. This publication serves as a valuable resource for our clients, providing them with updates on our services, community events, and success stories. The new design and content aim to keep our clients informed and connected, reinforcing OBVS's commitment to open and transparent communication.


Participation in Oak Bay's Night Markets

In keeping with tradition, OBVS was thrilled to participate in Oak Bay's Night Markets again, showcasing our organization and spreading awareness about our impactful work. Our presence at these events allowed us to engage with the community, answer questions, and highlight the various volunteer opportunities available. By participating in Oak Bay's Night Markets, we reinforced our commitment to building strong relationships within the community.

Farewell and Welcome

In 2023, we bid a fond farewell to Renee Lorme-Gulbrandsen, who dedicated over six years of service to OBVS. We extend our heartfelt appreciation to Renee for her invaluable contributions and wish her the best in her future endeavors. Simultaneously, we are delighted to welcome our new Executive Director, Kara Udell, who brings a wealth of experience and a fresh perspective to our organization. We are excited to have Kara lead us into the future and continue the vital work of OBVS.

It has been a wonderful journey, and we can't wait to see what the year ahead will bring!



**WE WOULD NOT BE WHERE WE ARE
TODAY WITHOUT OUR SPONSORS
AND THE GENEROSITY OF OUR
DONORS, PARTICULARLY THE
DISTRICT OF OAK BAY, FOR ITS
GENEROUS SUPPORT IN KIND
OVER THE YEARS.**

With the worst of COVID-19 behind us, OBVS has not only managed to resume its regular services but has also introduced new initiatives such as 'Cultural Companions,' 'Companion Pets,' 'Destination Walks', and 'Sorting & Packing.' This achievement is a testament to the resilience and adaptability of our organization. We extend our heartfelt thanks to all the dedicated volunteers who have been instrumental in ensuring our clients continue to receive our services. We also acknowledge and applaud the hard-working staff who support our clients, volunteers, and each other in the day-to-day running of the organization.

BOARD CHAIR'S *Report*

With the worst of COVID-19 behind us, OBVS has not only managed to resume its regular services but has also introduced new initiatives such as 'Cultural Companions,' 'Companion Pets,' 'Destination Walks', and 'Sorting & Packing.' This achievement is a testament to the resilience and adaptability of our organization. We extend our heartfelt thanks to all the dedicated volunteers who have been instrumental in ensuring our clients continue to receive our services. We also acknowledge and applaud the hard-working staff who support our clients, volunteers, and each other in the day-to-day running of the organization.

We would not be where we are today without our sponsors and the generosity of our donors, particularly the District of Oak Bay, for its generous support in kind over the years. One way we hope to increase donorship is through legacy giving as you prepare or revise your will. Please call the office for more information or consult your financial advisor. Another immediate tax-saving strategy is to gift stocks, and your advisor can also guide you through this. It is a strategy I have used to receive a tax refund instead of having to pay.

The past year has been a significant one for the Board as we embarked on the search for a new Executive Director to succeed Renee Lorme-Gulbrandsen, who served us for six years. After a thorough selection process, we are delighted to welcome Kara Udel, who assumed the position on January 2. Kara brings with her a wealth of fresh ideas that the incoming Board will consider. As the Chair, I am eagerly looking forward to the changes she plans to implement to propel OBVS forward, which will be further discussed as the Board develops a new Strategic Plan.

Recently, we received two early resignations from Board members for personal reasons. Yuka Sugar joined the Board to replace our first 'early retirement' member; as a short-term replacement, she will run for office to continue as a full-term board member. David Cattrall has fulfilled the maximum six years allowed by our Constitution, and we thank him for his leadership as Board Chair and for his work on the committees he served. His commitment to OBVS during his term on the Board is greatly appreciated.

Sincere thanks and best wishes to other departing members of the board for their service and contributions: David Collins, Brian Malone, and Keith Wells. David was our long-serving Treasurer, Brian recruited many current board members as Chair of the Nominating Committee, and Keith instigated our Fundraising Committee.

After shortlisting applicants and conducting interviews, you will be presented with a slate of four directors to be voted on at our 2024 AGM.

If you are interested in serving on the Board in the future, please contact me. The job is not onerous, and it is rewarding to know you are helping to guide the Society in new directions. There will be vacancies to be filled at the next AGM due to other Directors reaching their 6-year limit, so please consider it.

Respectfully submitted,



Bronwyn Taylor
Board Chair, OBVS
taylorbronwyn@shaw.ca

2023-2024 FINANCIALS

Financial Reports
Review By
James Holland

SUMMARY

Thanks to the unwavering support of our dedicated funders, OBVS experienced yet another successful fiscal year in 2023-2024. The year began with a budget of \$377,200, backed by a fund development goal of \$303,852, an increase of 5% compared to the previous year.

At the close of the fiscal year, our total expenditure amounted to approximately \$355,000, which was \$22,200 lower than projected. Meanwhile, our revenue reached around \$340,000, exceeding expectations by \$36,000. This surplus of over \$58,000 enables us to continue providing support and investing in the growth of our operations.

KEY DRIVERS

On reviewing spending trends, notable changes include a significant rise in staffing costs compared to the previous year. This increase can be largely attributed to the extended absence of one of our full-time team members throughout 2022, which necessitated hiring an interim team member to cover their responsibilities in 2023-2024.

Additionally, administrative costs experienced a surge due to executive leadership turnover and associated marketing expenses. These figures were further influenced by certain one-time professional service fees incurred during the year. In contrast, our Information and Technology costs decreased considerably from the previous year, as additional funds had been allocated in 2022 to support the development of our data management software.

Aside from minor increases to accommodate anticipated annual inflation, our Staff Development budget saw a notable boost. This rise was prompted by new leadership, encouraging the team to take full advantage of the Professional Development funding allocated to them. These funds empower our team members by facilitating continuous learning, the acquisition of new skills and connections, and the preservation of their unwavering dedication to community action.

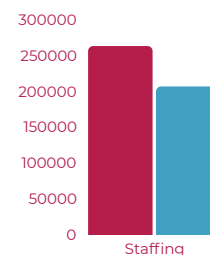
A final figure not reflected in this financial report is \$156,280, representing the monetary value of over 7,200 hours of volunteer time that made this year possible. We cannot adequately express our gratitude for each and every individual who selflessly contributed their time, money, and heartfelt efforts throughout the past year.

Thank you!

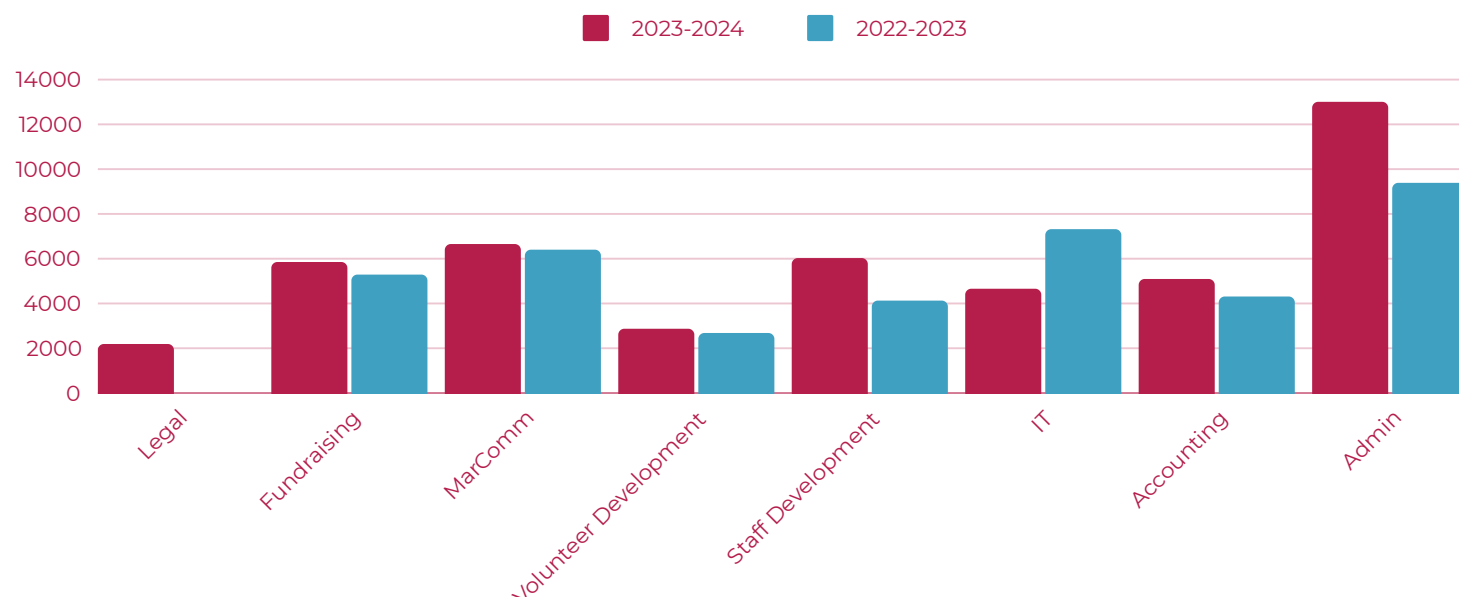
2023-2024

ANNUAL FINANCIAL SUMMARY

Y/E Bank Balance	\$88,078
Y/E Contingency Fund Balance	\$2,592
Hosted Endowment Market Value	\$766,927
1 Year Cashable GIC Balance	\$17,052



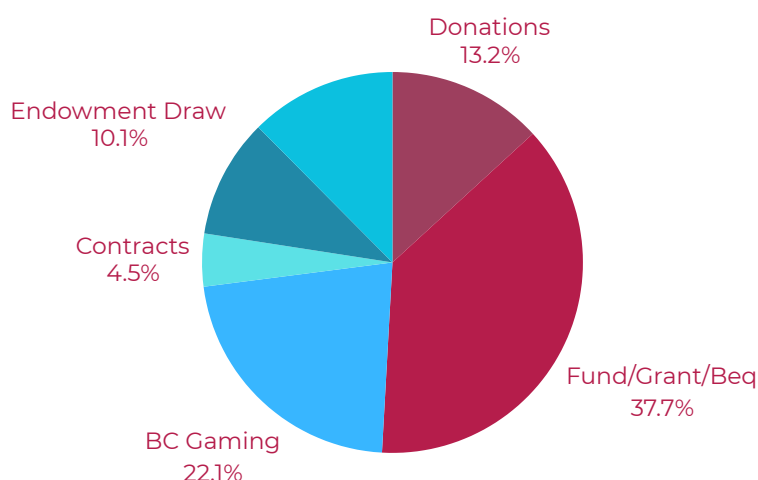
2023-2024 Spending vs. 2020-2023 Spending



	Staffing	Fundraising	MarComm	Volunteer Development	Staff Development	IT	Accounting	Admin
2023-2024	\$262,931	\$5,852	\$6,655	\$2,871	\$6,028	\$4,658	\$5,094	\$13,007
2022-2023	\$206,638	\$5,290	\$6,403	\$2,682	\$4,128	\$7,319	\$4,311	\$9,388

2023-2024 Income Sources

Donations	\$44,794.56
Fundraising, Grants, & Bequests	\$128,008.21
BC Gaming	\$75,000
Contracts	\$15,220.97
Endowment Draw	\$34,362
In-Kind Rent/Utilities	\$42,249



May 1, 2024

Oak Bay Volunteer Services Society
Victoria, B.C.

To assist in the preparation of the financial statements of the Oak Bay Volunteer Services Society for the 2023-24 fiscal year, I have scrutinized the Society's balance sheet as at March 31, 2024 and the statement of operations for the twelve months then ended. In conducting my scrutiny, I had available to me the documents, information and explanations I required. I have not acted in the capacity of an independent auditor and have not undertaken an assurance engagement.

Based on my scrutiny, nothing has come to my attention that would require a change to these statements to have them present fairly the financial position of the Society as at March 31, 2024 and the results of its operations for the twelve months then ended, in accordance with Canadian generally accepted accounting principles consistently applied.

Yours truly,

A handwritten signature in blue ink, appearing to read 'J. Holland', with a stylized flourish at the end.

James Holland, CPA

LOOKING FORWARD

2024-2025 BUDGET

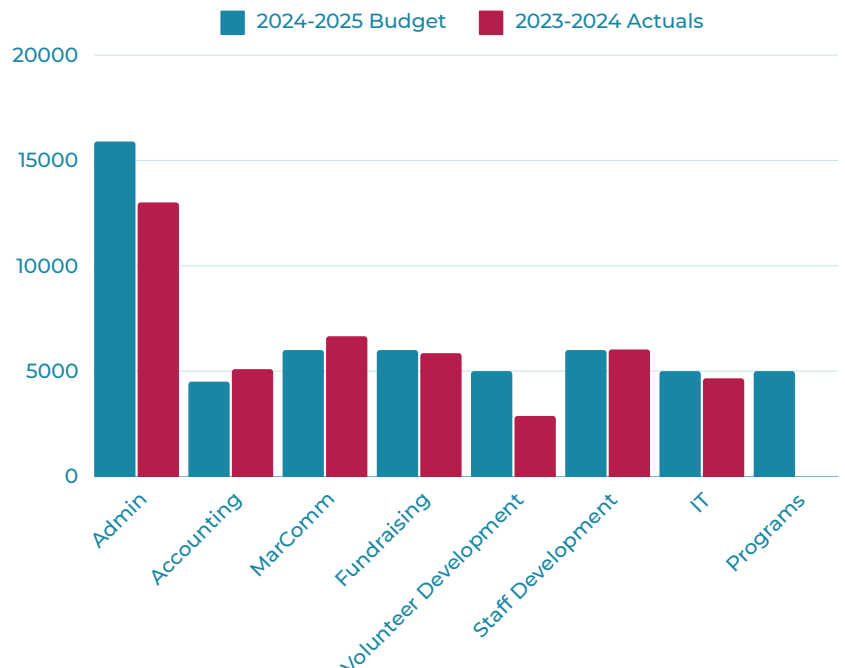
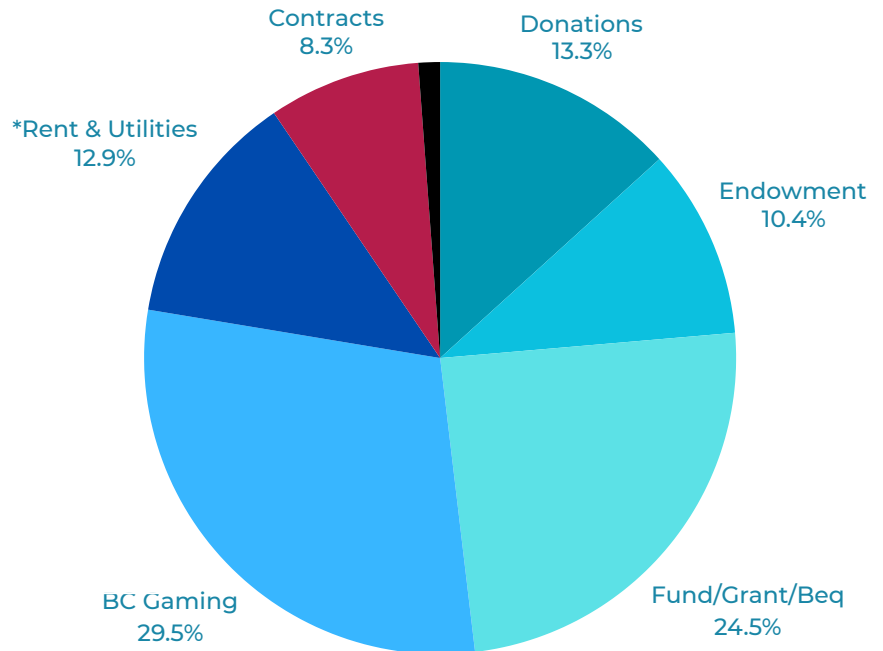
Net Assets	\$65,000
Contingency	\$2,592
Projected Income	\$338,987

Projected Income	\$338,987
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Donations	\$45,000
Endowment Draw	\$35,132
Fundraising, Grants, Bequests	\$82,971
BC Gaming	\$100,000
In-Kind Rent & Utilities	\$43,729
Contracts	\$28,155
SIPA Interest	\$4,000

Expenditures	\$406,579
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2024-2025	
Staffing	\$294,450
In-Kind Rent & Utilities	\$43,729
MarComm	\$6,000
Fundraising	\$6,000
Professional Services	\$5,000
Volunteer Development	\$5,000
Staff Development	\$6,000
IT	\$5,000
Accounting	\$4,500
Admin	\$15,900
Programs	\$5,000
Contingency Fund	\$10,000



NOTE: The projected income rests lower than the budgeted expenditures due to the integration of remaining funds from the previous fiscal year; which brings us to a balanced budget. Increased budgetary allotments are reflective of a drive to improve brand awareness, the development of new programming, increased investment into our staff and volunteers, and the transition of our interim PT employee to permanent FT.

Meet Our **BOARD OF DIRECTORS**



Bronwyn Taylor
Chair



Michael Shannon
Vice-Chair &
Interim Treasurer



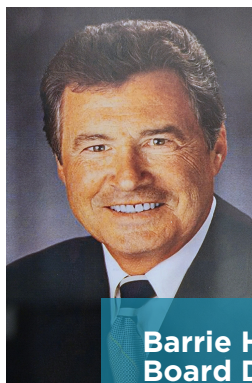
David Cattrall
Secretary



Diana Black
Board Director



Stu Moore
Board Director



Barrie Hewstan
Board Director



Keith Wells
Board Director



Yuka Sugar
Interim Board Director

**BEHIND EVERY STRATEGIC DECISION,
POLICY, AND FINANCIAL REPORT IS OUR
WONDERFUL BOARD OF DIRECTORS. A
TEAM WHO EMBODIES SERVICE,
COMMUNITY CARE, AND DEDICATION.**

Behind the Scenes

We couldn't wrap up this year's review without thanking the people who worked tirelessly behind the scenes to guide, develop, and support our growth.

Bronwyn Taylor - *Board Chair*

Michael Shannon - *Board Vice-Chair and Interim Treasurer*

David Cattrall - *Board Secretary*

Stu Moore - *Board Director*

Diana Black - *Board Director*

Barrie Hewstan - *Board Director*

Keith Wells - *Board Director*

Yuka Sugar - *Interim Board Director*

Brian Malone - *Former Board Director*

Left in April 2024

David Collins - *Former Board Treasurer*

Left in January 2024

Renee Lorme-Gulbrandsen - *Former Executive Director*
2017-2023



Renee Lorme-Gulbrandsen



Stu Moore, Keith Wells, and David Collins

SUPPORTER *Spotlight*

AS WE REFLECT ON THE PAST YEAR WITH PROFOUND GRATITUDE, WE ARE DELIGHTED TO SHARE THAT OBVS EXPERIENCED ANOTHER REMARKABLE PERIOD OF COMMUNITY GROWTH AND ENGAGEMENT. IT IS WITH IMMENSE GRATITUDE THAT WE ACKNOWLEDGE THE UNWAVERING SUPPORT OF OUR DEDICATED COMMUNITY OF SUPPORTERS.

This year, we embarked upon our mission with a budget of \$377,200, armed with an ambitious fund development goal of \$303,852. Thanks to your loyal support, we not only met but exceeded this target, realizing a remarkable 5% increase compared to the previous fiscal year. Your steadfast commitment has directly enabled us to make a transformative difference in the lives of those we serve, and we are deeply grateful for this.

It gives us great pleasure to report that in wrapping up our 2023-2024 fiscal year, our total expenditure rested at approximately \$355,000, significantly lower than initially projected. This careful allocation of funds ensures that your contributions are maximized to their fullest potential and reflects our commitment to maintaining fiscal responsibility. Simultaneously, our revenue soared to approximately \$340,000, surpassing our expectations by a staggering \$36,000. This surplus, amounting to over \$58,000, endows us with the means to carry out our essential support services and invest in the growth of our operations.

Where there have been challenges, there have also been triumphs. Thanks to your immeasurable generosity, we were able to allocate additional funds to staff development, empowering our team members to capitalize on valuable professional development opportunities. This wise investment ensures that our staff remains equipped with the most cutting-edge skills and knowledge, ultimately enabling us to meet the evolving needs of our community more effectively.

Lastly, we cannot express in words the immeasurable value of the over 7,200 hours of your volunteer time dedicated to OBVS. Your selfless commitment exemplifies the spirit of our mission and serves as a profound testament to the transformative power of collective action.

As we forge into the new fiscal year, our hearts are filled with inspiration from your unwavering support and resolute commitment to our cause. Your invaluable investments empower us to continue our vital work in reducing isolation, fostering connections, and supporting independent living for all community members. We extend our deepest gratitude for your unwavering generosity and eagerly look forward to another year of profound impact, hand in hand.

Thank you.

R. K. Grant Family Foundation

Offering support to those providing health and educational support to children and the elderly.



Tony and Mignon Fenton Trust

Granting funds to qualified donees that provide home care and related social services to the elderly in the Greater Victoria Area.



Thank you!



Award Recipients

Each year we honour the dedication of volunteers who have hit milestones in their volunteering. In 2024 we celebrate the following volunteers:

25 YEARS

Garth Mayhew
Irene Robirtis
Jim Arnott

20 YEARS

Malca Casiro

15 YEARS

John Harris

10 YEARS

Alan Bolitho

5 YEARS

Alison Henry, Bernie Stanley, Debra Young, Jim Brookes, Ken Anderson,
Lynne Taylor, Rick Pettinger, Brian Malone

A BIG THANK YOU TO THOSE WE HONOUR ABOVE AND TO ALL OF OUR DEDICATED VOLUNTEERS FOR YOUR UNWAVERING SUPPORT TO OBVS AND THE COMMUNITY WE SERVE!



YOUR TALENTS, COMPASSION, AND JOY ENRICH THE LIVES OF THE NEIGHBOURS YOU ASSIST, WHO FREQUENTLY CALL IN TO EXPRESS THEIR GRATITUDE FOR YOUR KINDNESS.

YOUR CARING CONTRIBUTIONS ARE APPRECIATED MORE THAN WE CAN EXPRESS.

NOTES

NOTES



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