



Oak Bay Volunteer Services

*A Community of Helping Hands*

2023



# ANNUAL REPORT



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## ABOUT OAK BAY VOLUNTEER SERVICES

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### 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.

### CORE VALUES

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

### BOARD OF DIRECTORS

Chair	David Cattrall
Vice-Chair & Secretary	Bronwyn Taylor
Treasurer	David Collins
Director	Brian Malone
Director	Susi Merchant
Director	Diane Kallal
Director	Keith Wells
Director	Michael Shannon

### STAFF

Executive Director	Renee Lormé-Gulbrandsen
Outreach and Services Coordinator	Robin Love
Volunteer Coordinator	Ruth Platts
Administrative Coordinator	Jaimie Sumner
Bookkeeper	Nancy Wyeth

Thank you to the following staff members for their service this year:

Chu-ting Hsu and Melinda Mann

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## MESSAGE FROM THE BOARD CHAIR

David Cattrall

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To the Members of the Oak Bay Volunteer Services Society:

Thanks to the hard work of the staff, and thanks to all our wonderful volunteers, the Oak Bay Volunteers is pretty much back to offering its full suite of services to the community and our many grateful clients. Of course, while it is no longer a pandemic, COVID remains prevalent in the community so we all need to remain a little cautious and somewhat flexible. But the services we provide are so important and our staff and volunteers are so committed and dedicated, that I feel confident our Society will continue to grow from strength to strength.

Thanks are also due to our donors and sponsors and, in particular, to the Mayor, Council and staff of the District of Oak Bay for their unwavering support during a period which has been as challenging for them as it has been for us. And, special thanks to our ED, Renee, for her exceptional leadership. The Board thank you all for your work to support our very special community.

The Board of Directors are proud and happy to provide encouragement and direction to the Society as it continues to grow and develop. Today, two of our members, Susi Merchant and Diane Kallal, will be stepping down today as their term is complete. We thank them sincerely for their excellent contributions over the last 6 years. However, we are pleased to have 2 fine candidates to replace them. Looking ahead, though, 4 more of our current Board members will be stepping down in the next two years so we are already beginning the search for interested and committed new members to replace them. I invite all of you to consider this opportunity. Clearly you have the commitment and interest and the position, while important, is not very onerous. If you would like to learn more, please contact Brian Malone, the Chair of our Nominating Committee.



David Cattrall  
Chair, OBVS



Brian Malone, Bronwyn Taylor, David Cattrall  
Keith Wells, Michael Shannon, Susi Merchant,  
Diane Kallal, David Collins

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## MESSAGE FROM THE EXECUTIVE DIRECTOR

Renee Lormé-Gulbrandsen

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Oak Bay Volunteer Services Society celebrated its 45th year of service this year. What an impactful legacy our organization already has in the community of Oak Bay, particularly after two years of the COVID-19 pandemic. This legacy is a testament to the staff, board of directors, and volunteers who have dedicated many hours of service and an unwavering commitment to serve.

In 2022-2023, OBVS transitioned from our COVID-19 Health Emergency Response to our Communicable Disease Operations. This transition signalled a switch from preventative policies and procedures to operating with the understanding that the COVID-19 virus will be a variable for ongoing service and program provision into the future. It also signalled the

need to provide a hybrid array of services, continuing with those introduced during the height of the pandemic with a return to others offered before the pandemic. We also reinstated our Hop Aboard Seniors Shopping Bus program to the delight of many clients.

The move to a hybrid array of services dramatically increased requests as our 532 clients utilized the new offerings. Our 186 volunteers delivered nearly 5,700 services, an increase of 1,200 from the previous year. This increase reflects the trust and reliability felt by clients for our volunteers who extended kindness during a continued time of uneasiness, particularly for individuals with health vulnerabilities.

Our 45th Anniversary Celebration on June 14, 2022, was our first in-person event since 2019. While we hosted our annual general meeting, we also honoured deserving volunteers who reached milestones in volunteering with OBVS, including 25, 30, 35, and 40 years of service! There was excitement in the air as staff, volunteers, and guests reconnected for the first time in years.

Any executive director knows success relies on a collaborative team who shares your vision. Thanks to Ruth, Jaimie, Melinda, and Robin's dedication and expertise, OBVS has successfully navigated our transition to our 'new normal' this year. Their commitment to excellence in volunteer coordination, client support and outreach, and administration is

greatly treasured and appreciated.

This year we honour volunteer Eric Payne who has dedicated 20 years of service to Oak Bay Volunteers. He is among 17 volunteers being recognized for milestones this year (see page 14) . We thank each of them for their steadfast dedication to serving the community.

Serving Oak Bay Volunteer Services as Executive Director for a fifth year has been a pleasure, and I look forward to an exciting year ahead for our organization.

With thanks and appreciation,

A handwritten signature in black ink, appearing to read "Renee Lormé-Gulbrandsen".

Renee Lormé-Gulbrandsen  
Executive Director, OBVS

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## HELPING HEARTS MONTHLY GIVING CLUB

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We're so grateful for the community that has funded, volunteered, and celebrated Oak Bay Volunteer Services. Knowing that the safety and well-being of neighbours-in-need are important to you makes all the difference.

For 46 years, our vision of ensuring that Oak Bay residents are supported, valued, and connected has been the thread through our service and program delivery. That's why we're asking you to help us cover the cost of continuing our work together by becoming a **Helping Hearts Monthly Donor**.

Joining the **OBVS Helping Hearts Club**, our treasured community of monthly donors, is the most effective way to support clients like Steve, who needs drives to life-sustaining dialysis three times a week. It is a simple way to ensure that 97-year-old Beverly receives the weekly groceries, medications, and fresh meals she needs to live independently. We hope that you find some peace knowing that neighbours-in-need of support are cared for because of your generosity.

### 2023 Goal:

123 Helping Hearts donating  
\$20/month

Visit [www.oakbayvolunteers.org/helpingheartsclub](http://www.oakbayvolunteers.org/helpingheartsclub) to pledge your support today.

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## ANNUAL GENERAL MEETING AGENDA

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- Event Welcome by Executive Director
- AGM Welcome and Call to Order by Chair
- Confirmation of Members Quorum
- Adoption of Agenda
- Approval of Minutes from Previous AGM
- Presentation of Financial Statements 2022-2023
- Executive Director's Report
- New Business
  - Members Resolution on Number of Directors on Board - Bylaw 4.1
- Election of New and Returning Board Directors
- Closing Remarks and Adjournment

The Volunteer Recognition will take place immediately following the Annual General Meeting.

This year's event includes a special presentation of the Sovereign's Medal for Volunteers to Mr. Ron Nicholson.

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## JUNE 2022 AGM MINUTES

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Minutes of the Annual General Meeting  
45th Anniversary Celebration  
Tuesday, June 14, 2022 at 11:30 AM  
Windsor Park Pavilion

### Event Welcome by Executive Director – Renee Lorme-Gulbrandsen

Renee began with the Aboriginal Land Acknowledgement, welcomed everyone to the meeting and thanked them for attending. She also thanked distinguished community guests for their support:

- Oak Bay Mayor Kevin Murdoch
- Councillor Esther Paterson
- Executive Director SVSS Brenda Lynn
- Jacqui McAfee from Revera Parkwood Court
- Melinda Cottingham from Revera The Kensington

Renee acknowledged the absence of Board members due to travel and illness (David Collins, Keith Wells, David Cattrall).

### Call to Order and Welcome

In the absence of Chair David Cattrall, Vice-chair Brian Malone presided over the AGM, called the meeting to order at 11:40 am and welcomed everyone. He thanked Renee, her staff, the Directors present and all the volunteers for their work under the onerous circumstances of the pandemic.

### Confirmation of Quorum

A quorum is 15 voting members. More than 15 voting members and staff attended; therefore quorum was declared.

### Adoption of Agenda

MOVED by Bronwyn Taylor and SECONDED by Susi Merchant that the agenda be adopted. CARRIED

### Approval of Minutes of the previous Annual General Meeting

MOVED by Bronwyn Taylor and SECONDED by Susi Merchant that the Minutes of June 24, 2021 be approved. CARRIED.

### Presentation of Financial Statements 2020-2021

In the absence of Treasurer, David Collins, Renee presented the Financial Statements for April 1, 2021 to March 31, 2022 as printed in the Annual Report.

MOVED by Brian Malone and SECONDED by Diane Kallal that the Financial Statements be received. CARRIED.

#### **Executive Director's Report**

For full information, see the Annual Report made available at the door or on-line on our website. Renee highlighted some of the features of her report by showing slides. Despite limited pandemic focussed services, volunteers provided 10,200 hours of service over the year. Group services such as the Hop Aboard Shopping Bus will begin again, and the hope is to start a Senior Men's Activity Group. Renee also recognized our many funders, sponsors and donors.

#### **Election of Board Members**

MOVED by Diane Kallal and SECONDED by Bronwyn Taylor "That Michael Shannon, David Cattrall and Keith Wells to be elected for a 2-year term: CARRIED

Note: David Collins, Diane Kallal, Susi Merchant, Bronwyn Taylor and Brian Malone will continue the 2nd year of their terms.

#### **New Business**

None at this time.

#### **Closing Remarks**

Mayor Kevin Murdock thanked OBVS for the much-needed services they provide for the community, citing an example from his own experience as a driver just how rewarding it is to see the impact volunteers can have on the lives of others.

#### **Adjournment**

MOVED by Diane Kallal that the meeting be adjourned at 12:02 pm. CARRIED

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## FINANCIAL STATEMENTS

### MARCH 31, 2023

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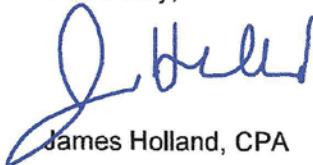
June 1, 2023

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 2022-23 fiscal year, I have scrutinized the Society's balance sheet as at March 31, 2023 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, 2023 and the results of its operations for the twelve months then ended, in accordance with Canadian generally accepted accounting principles consistently applied.

Yours truly,



James Holland, CPA

**OAK BAY VOLUNTEER SERVICES**  
**Balance Sheet**  
**As of March 31, 2023**

	<b>Total</b>
<b>Assets</b>	
<b>Current Assets</b>	
<b>Cash and Cash Equivalent</b>	
Main Chequing TD-CT 0947042	73,347.80
Gaming Chequing - TD - CT 0302963	0.00
TD Business Investor Account	5,069.58
Petty Cash	200.00
TD GIC 9992-8047985-01	17,004.66
<b>Total Cash and Cash Equivalent</b>	<b>\$ 95,622.04</b>
<b>Total Current Assets</b>	<b>\$ 95,622.04</b>
 <b>Total Assets</b>	 <b>\$ 95,622.04</b>
 <b>Liabilities and Equity</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Accounts Payable	2,207.58
Income Tax Payable	56.23
LTD Deduction Payable (Receivable)	-265.35
GST Owing (Refund)	-1,532.50
British Columbia WSIB	424.41
Vacation Pay	85.71
<b>Total Current Liabilities</b>	<b>\$ 976.08</b>
<b>Total Liabilities</b>	<b>\$ 976.08</b>
<b>Equity</b>	
Opening Balance Equity	98,620.52
Retained Earnings	-24,737.94
Profit for the year	20,763.38
<b>Total Equity</b>	<b>\$ 94,645.96</b>
 <b>Total Liabilities and Equity</b>	 <b>\$ 95,622.04</b>

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David Cattrall, Chair

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David Collins, Treasurer

**OAK BAY VOLUNTEER SERVICES SOCIETY**  
**STATEMENT OF OPERATIONS: APRIL 1, 2022 to MARCH 31, 2023**

	2022-2023	2021-2022
<b>INCOME</b>		
Donations	38,598.07	38,504.11
Endowment Earnings	31,915.00	27,675.00
Fundraising, Grants and Bequests	62,695.80	95,942.40
Gaming Grants	75,000.00	75,000.00
Gaming Other Grants	200.00	100.00
JBCP - Better at Home	12,500.00	12,500.00
Municipal Govt - General	37,500.00	35,000.00
Municipal Govt - Rent/Utilities (note 1)	41,424.00	39,678.10
United Way	-	-
Island Health	9,558.00	9,889.00
Covid-19 Temporary Wage Subsidy	-	-
<b>TOTAL INCOME</b>	<b>309,390.87</b>	<b>334,288.61</b>
<b>EXPENSES</b>		
Amortization	-	216.10
Accounting	4,310.79	3,573.76
Board of Directors	750.15	1,932.55
Car Expense Driving Clients	1,186.57	1,096.00
Information Technology	7,319.43	6,068.67
Employee Benefits	7,804.86	19,470.54
Employees Gross Salaries	182,196.51	200,967.38
Fundraising	5,290.17	4,363.84
Insurance	1,794.00	1,377.00
Office Relocation Expenses	183.45	9,346.27
Office Supplies	2,431.72	2,172.39
Postage	443.58	213.15
Programming Expenses	-	-
Marketing and Communication	6,402.70	5,563.99
Rent & Utilities (note 1)	41,424.00	39,678.10
RRSP Benefits	14,983.02	18,884.03
Staff Development	2,671.57	1,805.56
Staff Travel Expenses	1,456.84	175.84
Subscriptions & Memberships	1,160.01	1,480.76
Telephone	2,482.68	2,733.70
Victoria Foundation Trust Fund/Bequests	-	-
Volunteer Development	2,682.28	2,435.10
Website and Database Development	-	-
Workers Compensation Board	1,653.16	1,804.95
(Gain) Loss on Disposal of Fixed Assets	864.46	
<b>TOTAL EXPENSES</b>	<b>288,627.49</b>	<b>326,224.14</b>
Net (Expenses) / Income for the year	<b>20,763.38</b>	<b>8,064.47</b>

Note 1: In kind

**OAK BAY VOLUNTEER SERVICES SOCIETY**  
**ADDITIONAL FINANCIAL INFORMATION AT MARCH 31, 2023**

Net current assets available for operations:

Current assets:	
Cash in bank	78,417.38
GIC - One Year	17,004.66
Petty Cash	200.00
GST Rebate Claim	<u>1,532.50</u>
	<u>97,154.54</u>

Current Liabilities:

WCB payable	424.41
TD Business Visa	2,207.58
Income Tax Payable	<u>56.23</u>
	<u>2,688.22</u>

**Net current assets** **94,466.32**

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## AWARD RECIPIENTS

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### VOLUNTEER ACHIEVEMENT

Each year we honour the dedication of volunteers who have hit milestones. In 2023, we celebrate the following volunteers:

#### 20 YEARS

Eric Payne

#### 15 YEARS

Heather Lund

Margaret Hawkins

Nancie Hanson

Tony Gooch

#### 10 YEARS

Bob Tacon

Jacquie Collins

#### 5 YEARS

Derek Thompson

Ian Robertson

Yan Sun

Lois Jones

Donna Massey

Darcy Schnurr

Sheila Kaye

Ruth Kiechle

Lorrie Shaw

Allan Oliver

### IN MEMORIAM

This year we said goodbye to the following active volunteer:

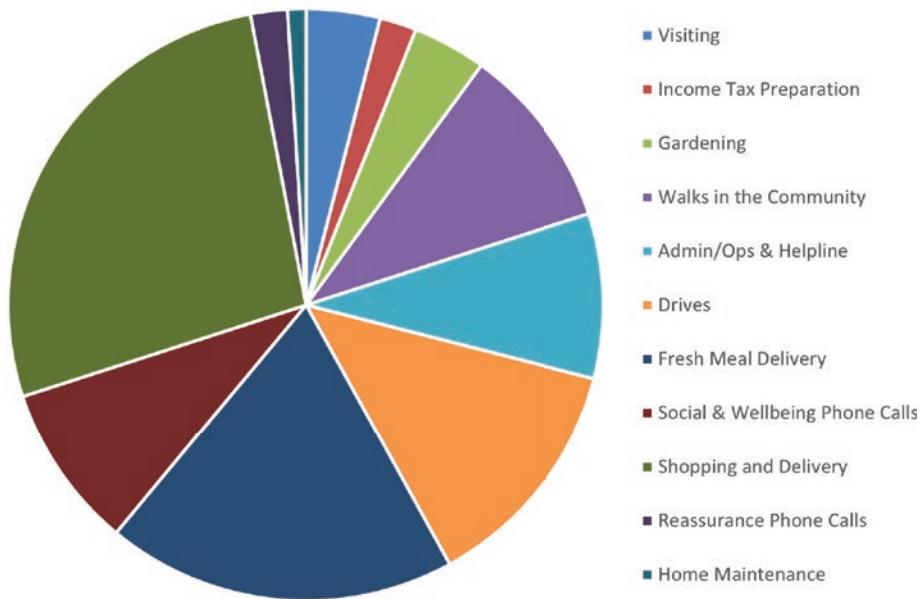
Jean Ashworth - 4 years

Thank you to those we honour above and to all of our volunteers for their many years of support to OBVS and the community. You all bring your talent, compassion and joy to the clients you serve and we hear often how thankful they are for your kindness.

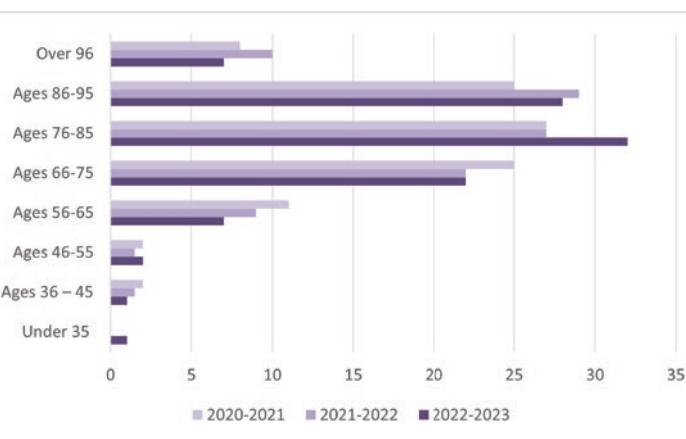
# STATISTICS AND TRENDS OAK BAY VOLUNTEER SERVICES

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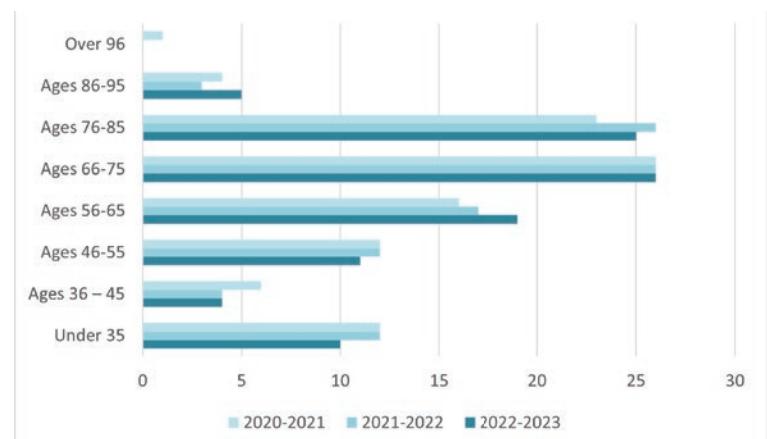
## VOLUNTEER ACTIVITIES AND CLIENT SERVICES



## CLIENT AGES BY PERCENTAGE



## VOLUNTEER AGES BY PERCENTAGE



## IN THE NEWS

### OAK BAY VOLUNTEER SERVICES



**Celebrating 45 Years of Community Service!**

Oak Bay is a municipality steeped with history and a strong sense of community. It is home to families that go back generations and iconic residences that still stand in their original beauty. In 1975, this Oak Bay pride and commitment brought forth the "Community Services Survey" to help identify the needs of the community. From that survey, the roots of Oak Bay Volunteer Services Society were planted.

As we celebrate our 45<sup>th</sup> year of service to the community, we think back on our own history as an organization: the thousands of residents who experienced the kindness of our volunteers through one-to-one services; the countless volunteers who delivered gifts of their time and talents to bring light to someone in need; the unwavering support of our municipal leaders and partner agencies; and the many community donors who gave generously in support of our charitable endeavours. We are thankful to be a part of a community that cares because we know that a community is stronger together.

Thank you to everyone who has been integral to our success in our first 45 years and we look forward to another 45 years in service to the beautiful community of Oak Bay!

**"The greatness of a community is most accurately measured by the compassionate actions of its members."**  
- Coretta Scott King

**Did You Know?**

In year 2 of the COVID-19 Pandemic, OBVS Volunteers dedicated 10,200 hours to delivering services including:

- Drives to appointments and meal delivery: **1,100 hours**
- Shopping with delivery of groceries and medication: **2,500 hours**
- Social and wellness check phone calls: **4,300 hours**

A4 Thursday, April 20, 2023

Oak Bay News

To learn more about volunteering with OBVS, visit our website at [www.oakbayvolunteers.org/volunteer](http://www.oakbayvolunteers.org/volunteer)



**Thank you, Volunteers!**

Volunteers are the heart of Oak Bay Volunteer Services. Whether delivering groceries, medication, or fresh meals to seniors, visiting with isolated residents, or driving clients to important medical appointments, our volunteers passionately serve for the good of our community.

This National Volunteer Week, we honour the volunteers of our **Community of Helping Hands** who are making a difference in the lives of neighbours-in-need. Their kindness and commitment make an impact each day throughout the District of Oak Bay. We thank them for their service to the community they love.



Oak Bay Mayor Kevin Murdoch thanks John Hurlburt for his 35 years of volunteering with Oak Bay Volunteer Services Society (Christine van Reeuwyk/News Staff)

## Oak Bay volunteers mark 45 years of giving time, talent to connect community

Over the year, 200 volunteers helped 500 clients, delivering 4,500 services over 10,200 hours

CHRISTINE VAN REEUWYK / Jun. 19, 2022 5:00 a.m. / COMMUNITY



**TRANSPORTATION**

**BREAD, BUTTER, AND SOCIAL CONNECTION**

Prior to the pandemic, the Oak Bay Volunteer Services Society was a well-utilized resource for the Oak Bay community, delivering groceries, pharmaceuticals, and rides to necessary appointments. When the pandemic hit, the society became an essential link between those isolated at home and the rest of the world, delivering over 10,200 hours of service to a community with complex needs: primarily seniors and folks with physical and mental health challenges who were locked down and reliant on the kindness of volunteers to bring them groceries, medications, and personal contact.

"In Oak Bay, there's always been this sense of generosity," said Renee Lormé-Gulbrandsen, Executive Director of the Oak Bay Volunteer Services Society. "We've been fortunate with our efforts to recruit volunteers because people really love this community. Between April 2021 and March 2022, we had 188 volunteers assisting 511 clients. This is our 45th year of service to the community, and through the generosity of organizations like the Victoria Foundation and the kindness and dedication of our volunteers, we're able to ensure people get the support they need, especially during the most challenging times."

11 VITAL SIGNS CITIZEN SURVEY GRADE

32 // VICTORIA VITAL SIGNS | 2022

# IN THE NEWS CONTINUED OAK BAY VOLUNTEER SERVICES

W2 Thursday, June 16, 2022

Oak Bay News

www.oakbaynews.com

www.oakbaynews.com

Oak Bay News

Thursday, June 16, 2022 W3



## Get behind your community. **Get Behind The Wheel.**

One of the most important services we offer is drives. Whether the drive is for a medical appointment, a food hamper pickup, grocery shopping, or a drop-off for a recreational program, drives help our clients remain physically active and meet their needs for continuing to live independently in their homes. This service provides door-to-door transportation to and from a location in Greater Victoria, the ability to accommodate mobility aids such as walkers and wheelchairs, and is delivered by a caring volunteer who provides companionship during the trip. If you enjoy meeting new people and love to drive, join our roster of Volunteer Drivers!

## Peace of Mind for Someone Living Alone **Reassurance Phone Calls**

While some OBVS services are for companionship or convenience, some are for the health and safety of a client. Reassurance Phone Calls provide peace of mind through scheduled check-in phone calls from a dependable volunteer to someone who lives alone in their home. These calls follow a protocol to ensure the well-being of a client is maintained and should an emergency arise, a plan is in place to help that individual get the care he or she needs.

Residents interested in this service can contact the OBVS office at (250) 595-1034 for more information.

## Nutritious Meals, Valuable Social Connections **More Than Meals Program**

Receiving fresh, healthy meals can make such a difference in the life of a senior. OBVS is a proud partner of the **More Than Meals Program** which provides weekly meals to seniors throughout Greater Victoria. Clients receive three fresh, nutritious meals delivered by one of our caring volunteers. Participation is on a sliding scale based on personal income. If you are interested in receiving fresh meals, contact OBVS at (250) 595-1034 to learn more.



## Client Services and Volunteer Opportunities

- Drives to medical appointments, recreation and shopping
- Companionship through home visits and social phone calls
- Walks in the community
- Reassurance phone calls
- Home support: Light gardening, minor home repairs and technology support
- Income tax return preparation



## Helping Neighbours Live Independently Since 1977

Oak Bay Volunteer Services Society provides free services to the residents of Oak Bay. Serving the young to the 'young at heart', we offer services to help maintain independent living and provide a connection to the community. Services are delivered by dependable, caring volunteers who share their time and talents with those they serve.



- Drives to medical appointments, shopping, recreation and errands
- Companionship through visits or phone calls
- Walks in the community
- Fresh meal delivery for seniors
- Minor home repair and light gardening
- Income tax preparation



We always welcome new clients and new volunteers.  
Contact us today!

(250) 595-1034 | [info@oakbayvolunteers.org](mailto:info@oakbayvolunteers.org)  
[www.oakbayvolunteers.org](http://www.oakbayvolunteers.org)

## THE YEAR IN PICTURES





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THANK YOU  
TO OUR FUNDERS AND DONORS

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Government  
of Canada

Gouvernement  
du Canada



VICTORIA  
FOUNDATION

ST. PATRICK'S KNIGHTS  
OF COLUMBUS



United Way  
Southern  
Vancouver Island



United Way



Better at Home is funded by the Government of British Columbia.  
In partnership with James Bay Community Project

THE TONY AND MIGNON  
FENTON TRUST

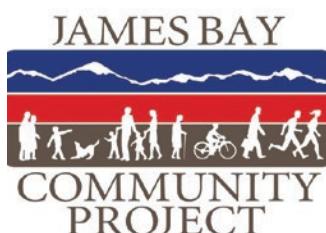


A special thank you to the businesses and residents of Oak Bay  
for their generous donations and legacy giving

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**THANK YOU**  
TO OUR COMMUNITY SPONSORS & PARTNERS

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**virtualwave media**  
web design & consulting



**Capital City Volunteers**  
connecting generations / enhancing independence



**E P I C U R E**™



**BC ASSOCIATION OF  
Community Response Networks**

*Stopping Adult Abuse and Neglect ... Together.*





*A Community of Helping Hands*

## Be a Part of Your Community.

Volunteer, Donate or Leave a Legacy so we can continue to provide free one-to-one services to those in need.

Oak Bay Volunteer Services  
1442 Monterey Avenue  
Victoria, BC V8S 4W1

[info@oakbayvolunteers.org](mailto:info@oakbayvolunteers.org)  
(250) 595-1034  
[www.oakbayvolunteers.org](http://www.oakbayvolunteers.org)

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Follow us on social media



VolunteerOakBay



@oakbayvolunteer