Welcome to the Excel Society Community Report for 2013. Each year we take our readers on a journey through the year past as viewed from a particular theme. “Growth and Sustainability” is the theme for this report.

In 2013 we increased our capacity with new residential care homes both in Edmonton and in Calgary. Our 5 year commitment to expansion of the Grand Manor on 97th street is moving forward toward an additional 58 beds. Our plan is to be in the ground with construction in 2014. This expansion will be another substantial achievement for Excel and a major milestone for our 50th year of operation.

Looking back our focus has never wavered. We exist to help vulnerable Albertans deal with mental illness, developmental delay and a complex number of medical and brain injury issues. Growth has always been with us having started with 12-15 clients and now serving some 500. There are always people looking to help family or friends with their challenges.

Sustainability is quite another matter. Excel is a very flat organization with almost all resources focused on staff and facilities for our clients. We are a not for profit organization and as such it seems there is never enough money to do all the things we would like. At the same time all our staff are keenly aware of how much our clients depend on us to improve their lives.

The Alberta Government has increased its focus on its vulnerable citizens and we commend their commitments toward increased funding. On the community side we have the MK Group of Companies who have adopted Excel as a charity worth supporting. They are sponsoring their fifth annual golf tournament in support of our work. For the Excel Society sustainability is a day by day process involving prioritizing, planning and continuous awareness of our cash flow. Our 50 year history shows we have managed well and also demonstrates our need to maintain our focus.

Please enjoy our submission this year and we always enjoy hearing from you!
PRESIDENT’S INTRODUCTION

As Excel Society looks back over the past 50 years, the Board and Staff can be proud of the many accomplishments attained. From a simple beginning with fifteen clients and two staff, the organization has flourished and now supports over 550 clients with a staff of close to 600.

Changing needs and expectations have taken Excel Society through many iterations. The section on Milestones will give you an idea of how important it is for a human services organization to be able to adapt to meet client needs and government expectations.

As a not for profit, the greatest challenge is sustainability, balancing the desire for excellence in service and facilities and the cost of doing business. Excel relies heavily on our funders to ensure staffing is adequate to support the clients served, many of them complex needs clients. The relationship with Alberta Health Services, Persons with Developmental Disabilities, Children’s Services, and Northwest Territories is important to Excel and critical to our future.

“Success has always been easy to measure. It is the distance between one’s origins and one’s final achievement.”

Michael Korda

Partnerships in the community and with businesses provide the necessary support to enhance the quality of life for clients. The generosity of individuals and companies allow Excel to build new specially designed facilities and offer safe housing options.

However, the ‘raison d’être’ is the clients we serve. They have been and continue to be the centre of all that Excel Society is and does. Reading the many success stories enclosed will give you an idea of why the staff are so dedicated and committed, and why Excel strives to be the service provider of choice and the employer of choice.
BOARD CHAIR’S GREETINGS

A review of the Board’s activities during 2013 is evidence of a focus on growth, adaptation, and risk management. Two new members joined the Board of Directors to enhance the depth of knowledge and expertise of existing members. We were pleased to welcome Tracy Henebury, Barrister and Solicitor, MacPherson, Leslie & Tylerman, and Colleen Scott, Business Analyst, Telus. Excel Society is fortunate to have such a diverse and experienced Board of Directors who understands board governance and the related responsibilities.

The demand for client residential options spurred the opening of a new barrier free home for clients with medical conditions in Edmonton, and the opening of a special care home for clients with complex needs in Calgary. As well, the Board has been exploring financing options for the expansion of Grand Manor.

Due to the growth within Excel, the Board has been involved in ongoing review and approval of changes to policies and procedures, development of a Certificate of Compliance, and examination of the top ten areas of risk and strategies to mitigate the risk. Board practices including role of the Chair and roles and responsibilities of Board Members has been discussed, all with the purpose of better preparing the Board for future opportunities.

Some difficult decisions were required including the closure of Built to Learn, a retail kindergarten furniture store with roots to our beginnings in the 1960’s. In consort with the Senior Management Team, every area of Excel Society was scrutinized looking for savings and streamlining of operations.

The highlight of the year was the Strategic Planning Session in preparation for the next three year Corporate Plan. It was a time to reflect on past successes and how Excel Society has managed the growth and demands of increasing needs, as well as look to the future and what the next 50 years may hold for Excel.

Thank you to my colleagues on the Board for their professionalism and dedication.
EXCEL SOCIETY 2013 - BOARD MEMBERS

Left to Right
Jeff Dumont – Director
Brenda Schmermund – Director
Brad Perkins – Chair
Sharon Read – President/CEO
Jesse van der Werf – Director

Missing Board Members:

Chad Langager – Secretary Treasurer
Colleen Scott – Director
Tracy Henebury – Director
Mariesa Carbone – Vice Chair
Gary Rentz – Director
Dr. Tammy Hopper – Director
During 2013 the management team at Balwin Villa has introduced a new method for transferring knowledge to the staff that is making a difference in the quality of care provided to the residents’. It is called “Learning Circles”. This is a model for adult learning that has been in practice in the business field for some time and more recently has been adopted for use in seniors’ care centers across North America. The primary use has been as a form of stimulating discussion with dementia patients and as a mechanism for engaging residents in the day to day decisions that affect their quality of life.

At Balwin Villa we have taken a different approach based on research in which the circles are used with staff groups to improve teamwork, problem solving and day to day quality of care delivery. Other supportive living organizations including Excel Society are working with the research body ICCER (Institute of Continuing Care Education and Research) located at the University of Alberta, to take Learning Circles to the next level as an effective tool for knowledge transfer and quality improvement.

The definition used at Balwin Villa for Learning Circles is – “A formal gathering of a group of people utilized to “give a voice” to all participants in order to solve problems, make decisions, keep lines of communication open and/or to simply provide an opportunity for pleasant conversation. Once established on all pods and shifts, Learning Circles will be used to the greatest degree possible to determine the pod’s day to day operations and support the daily activities of the residents.”

In addition several guidelines were developed that included use of well-defined questions, clear objectives for each circle meeting, ensuring everyone has a chance to speak without interruption, and affirming the feelings of each participant. The members of the group are encouraged to listen carefully and actively, maintain an open mind, be understanding of others point of view, value your own experience and be prepared to disagree with respect in a spirit of collaboration.

The outcomes so far indicate that Learning Circles are an effective tool to open up discussion, build stronger team work, and ensure that knowledge obtained is understood and applied. The next step is to transfer the Learning Circle concept from a formal tool used by management to a daily method trusted and used by the staff to deal with day to day life issues at Balwin Villa.
Excel has operated a “harm reduction” program for more than 5 years and has learned what creates success and the infinite possibilities to assist clients to achieve their potential. Sustainability for these types of ongoing programs comes with research and an active sharing program with those who will build on the knowledge foundation. Our partnership in this case is with ICCER and with students from the University of Alberta. Basically we learn, we share and they learn to transfer knowledge into practice.

Becky Elkew, Director of Care at Grand Manor has been working with ICCER for the last three years on an Inter D Course which ICCER facilitates at the University of Alberta. The Institute for Continuing Care Education and Research (ICCER) is a collaborative network of post-secondary institutions and continuing care provider organizations.

Inter-professional Health Team Development (IntD 410) offers students the opportunity to develop the inter-professional team skills that will prepare them to meet the challenges of future work environments. The topics covered are:

- Bariatric Health Care
- Community Health
- Complementary & Alternative Medicine (CAM)
- Continuing Care
- Immigrant/Refugee Health Care
- Palliative Care
- Private Practice/Primary Care
- Rural Health Care (Online Distance Education)

Becky assisted in updating the curriculum and facilitating the course in 2012 and over the last three years she has given the students a presentation on alcohol harm reduction and information on the harm reduction program which is currently running at Grand Manor.
Looking back, people are asking how did Excel make it to 2014 and the 50th anniversary? How did we grow to some 600 employees and 500 clients? It would be self-serving to say “we are good people, doing a good job, for folks who need us.” The real truth is that the need for our services in our community is continually growing. Couple that with a strategic decision almost fifteen years ago to change to a “Business Focus” rather than just a social service focus and you are getting closer to the answer.

When The Excel Society began, it was to meet the needs of a few client/patients from Alberta Hospital Edmonton who’s doctors felt could return to the community with support. Our growth since then has seen immediate need planning, then short term planning until we began strategic planning.

Since 2001 we have gone through four major three year strategic planning cycles. Unlike many organizations that sequester board and management members for a planning retreat we went all in. We have used the services of a facilitator Mr. Scott Vaughan from the Community Development Unit of Alberta Culture for each of these sessions. His commitment and continuity has been of great assistance. Attendees for the sessions have been from throughout our organization. The people who make Excel function, front line staff, kitchen staff, maintenance staff, program managers and directors were all pressed into service in groups of 30-35 to examine the present and to determine our future direction.

Discussion was facilitated, keeping us on track, inputs were all recorded and a final report was shared with our Board of Directors all in an effort to sharpen our strategic direction and to help us sustain a critically needed service in our community and our province. Relationships between functions, operating policies and procedures have all seen polish and improvement as a result. Client benefit has been the continuous focus leading to very strong commitments.

The pictures demonstrate the input process and the commitment made by all the attendees for the 2013 session.
CORNERSTONES OF OUR BOARD

While lots of Excel employees contribute to the three year plan (strategy and ideas) the group that oversees or governs us is the Board of Directors. They are a volunteer group who take what they do seriously. What follows is a snapshot of the Board’s thinking and the cornerstones of their governance.

Vision, Mission, Values, Purpose and Mandate Statements are shared with all staff and contribute to the general strength of the Excel Society.

Core Businesses
Excel Society will focus on the following areas as their core business in support of its vision and mission:

- Providing safe and healthy housing options
- Enhancing life, social, and employment skills
- Providing supportive care
- Promoting staff and client lifelong learning

Operating Principles
Excel Society will administer and operate all programs/activities and conduct its core business based on the following principles:

- Recognition and respect for the uniqueness of all individuals
- Ethical and professional conduct
- Supportive of client choice, independence and the ability to take risks while ensuring health and safety is not compromised
- Innovation, flexibility, and responsiveness to needs
- Fiscal responsibility

Principles for Decision Making

- Always remember who we serve
- Be proactive whenever possible
- Know what business we are in and determine if/how ancillary services or businesses are complimentary
- Take difficult short term positions for long term gains
After six years we have finally launched a new website. This website comes just in time for celebrations of our 50th anniversary.

Our previous website was developed based on our perspective of what the public needed to know about us as service providers. The goal of the new website is to better serve the user whether you are browsing for information about your loved one, looking for information about Excel Society or browsing for job positions. We have attempted to make it user friendly and simplified definitions and vocabulary to ensure everyone looking for Excel Society has the chance to understand who we are.
5 Features we like…

1. A Story Banner—we have stories to tell and we have clients that exceed our expectations everyday! We truly deal with some of the most challenged clients but that fact has never stopped Excel staff from achieving success with our clients. We make differences in people’s lives everyday!

2. Side Banner—Do you see all the butterflies or origami on those buttons that you can click? Those art pieces are directly from our Gerard Raymond Centre (art program). They are colourful and remind us the beauty and capability of the clients. The sky is the limit.

3. Staff Pictures—If you scroll to the bottom of the page you will see five staff members, each time you refresh the page you will see five new faces. These people are some of our best and we like to hear what our employees say about us as we are excited to have the ability of recognizing them on our new website.

4. Navigation—we are a company dedicated to helping people so our navigation should be easy to use. Our website developers utilized drop down menus up top with a fully displayed menu footer. No need for scrolling, no need for guessing, and no need to be shy from our website if you are not tech savvy. We have truly attempted to make this process user friendly and minimal hassle to the user.

5. Social Media—we are looking to be more CONNECTED! Our social media icons/links are on the very top of our website. We are now managing our Linkedin, Facebook and Twitter! Connect with us! See what we are up to regularly and see pictures of our events.

We have upgraded and hopefully made it BETTER! Tell us what you think at www.facebook.com/excelsociety or tweet us @Excel_Society!
Terry lives with a brain injury resulting from a bad decision and a passing truck that totally changed his life. We met not long after he transferred from Excel’s Brain Injury Unit at Balwin Villa, to a Supportive Living Residence, a move that demonstrates his progress in recovery.

My first impression was that of a big bear of a young man with a warm smile and a solid handshake. A very likeable person Terry seems to be managing the changes in his life quite well. He has had help along the way, both from Excel staff and some specialized assistance from staff from WJS Canada, Acquired Brain Injury Division. Initially Terry was described as having a short temper with difficulty remembering appointments and DATS bookings. His freedom was limited to the brain injury unit where he could only leave using DATS; and being met by someone, his freedom was based on his dependence on others.

An Individual Service Plan was developed for Terry that focused on community access, increased independence and better decision making. Throughout the course of WJS service, Terry demonstrated continual improvement. His memory significantly improved and he began demonstrating increased responsibility in decision making. In time, Terry demonstrated that he had improved to a degree that transition to a group home was preferable and that was where we met.

Terry’s WGS worker takes him out to Peter Hemingway Recreation and Leisure Centre and has set up an exercise plan that he enjoys. He likes to spend lots of time at the gym and a couple of times a week he uses Luminosity to help his memory. He mentioned that while he likes the WGS worker, he knows he will fade away just as the last one did. But he also knows that they and the Excel staff have all helped him in his recovery.

Terry comments on the change to his Support Home. “Mom came to help me move. I have a nice room and it does the trick!” He jokes, “I even brought my alcohol……only now… it’s my coffee maker.” Clearly his mother plays a big role in his life and she was a real hit as she brought an ice cream cake! Terry went home for Christmas and quickly pointed out about his sister’s husband making great turkey stuffing!

Excel’s vision of “Enriching Lives by Enabling Potential” continues and in Terry’s case it has truly brought Recovery, Freedom and Increased Independence.
ON FULFILLMENT AND REWARD!

Emily and Marv have retired to a full time job! In fact it seems they are working harder, yet not noticing it. Emily is a Support Home Operator (SHO) who has taken two clients from the Excel Society into their home, providing guidance and support along with some big doses of love, caring, and acceptance. But she is not alone, “Behind every successful woman there is a supportive man!” Jokes Marv.

“Our family has grown, and have their own lives”, says Emily “so we decided we have more to give.” And give they do so by helping special individuals through the SHO program. They have taken Dahlbert and Kevin into their home and work to expand their skills and to make them part of their family. Emily comments, “We encourage them to sit down to meals and actually talk with us, about their day, their goals and we work to help them get past barriers and limitations.” In fact, Emily finds books and games that work as teaching aids to raise skills and build confidence where needed.

Emily is the first one to say it takes patience to help adults to learn to tell time, to write their name, to read, and to use their manners like please and thank you. The return though is huge! “We get more than satisfaction, it’s a kind of fulfillment,” Emily comments, “there is such excitement at the end of the day when they show off a project or share the events of the day.”

“Receiving a Father’s Day Card or a heart-felt Thank you for supper reaches right inside of you so we get a lot of appreciation for our efforts.” Says Marv.

Bill Walker, their Creative Support Coordinator from Excel says, “Emily and Marv are the best in the world when it comes to genuinely helping “their boys” as they call them, and it is reflected in the positive results. There is a lot of satisfaction to be gained here and I believe they get it. As for “The Boys” they are both happy and healthy!”

Fulfillment may in fact be it’s own reward!
ACTIVE PARTICIPANTS IN OUR COMMUNITY AND UTILIZING COMMUNITY RESOURCES.

Over the summer in 2013 our day programs had many activities planned. Clients were able to experience nature and the joy of canoeing at Kirk Lake. For some of our staff and clients it was their first time canoeing, participating in another demonstration of Excel’s commitment to community involvement.

Comments from staff and clients attest to a successful venture:

“Four Excel day program clients and two staff [members] got the opportunity to give canoeing a try at Kirk Lake this August! It was an awesome experience for all of us!”

~ Leanne

“Let me know when I can next go again okay? I really liked canoeing!”

~ Michael

“I enjoyed canoeing. It made me happy & wet!”

~ Willy

“I really had fun canoeing! I was scared at first but then it was fun when I got the hang of it! I want to go again!”

~ Janet C

“I was very happy to join the group in canoeing! It was my first time ever. I must confess I was scared of being near a large body of water! But when I saw all the fun the group was having, I was determined not to miss out on the fun & excitement! So I challenged my fear & joined in. I’m proud of myself & am happy to say, my fear of water is gone!”

~ Sophia

“I enjoyed learning how to canoe & playing games before & after we went. I liked listening to my Allan Jackson CDs on the way to & back from Kirk Lake. It was nice when we went to Tim Hortons for lunch on our last canoeing day. I saw my friend Karen there. I hope I can go canoeing again!”

~ Larry
EXCEL ACADEMY

The theme for this year’s annual report is “Growth and Sustainability”, and that certainly has been the case at the Excel Academy this past year. It has proven to be an exciting year of significant changes to our programs. Our Health Care Aide (HCA) program ran three full time classes in 2013. We had fourteen graduates from the September intake class, six of whom achieved Graduation with Honours. The program welcomed Instructors Kimberley Stewart and Barbara Stephen, both of whom are committed to the highest level of quality instruction for their students.

Our Community Support Worker certificate program, under the leadership of Instructor Janet Bauer, was completely updated during the fall of 2013 and unveiled in January 2014. This revised program was developed with significant input from various stakeholders, including parents, behaviour specialists, educators, and leaders from other Service Provider agencies. It fosters a strengths-based approach to providing support. Additionally, a stronger emphasis on leadership, creative thinking and self-reflection supports the development of community support staff that can meet the increasing demands of this vital role in the disability services sector.

I would be remiss if I didn’t mention Deborah Viallet, who continues to provide amazing administrative support and is usually the first person you meet when you first come to the Academy. She was the 2013 recipient of the prestigious Excel Society President’s Award.

If January is any indication of what the rest of the year will be like, then 2014 will be an exciting one indeed. The Excel Academy, along with eight other community-based organizations, has partnered with Alberta Health Services, Addictions and Mental Health to be a community partner in the new Wellness Network. This new initiative is aimed at supporting Edmontonians who are dealing with mental health issues and/or addictions, though it is open to anyone that feels they would benefit from improved wellness. The Excel Academy is offering four courses to community members that are designed to support development in a number of wellness dimensions.

This January we also started a part-time Health Care Aide class, have moved towards offering several mandatory training courses online, and have developed a Community Support Worker Prior Learning Assessment & Recognition (CSW-PLAR) program. These new opportunities will be coming online this spring.

We are genuinely excited about the possibilities available to us here, and look forward to all that the coming year holds for us.

Chris Thomson
Director – Excel Academy
“Giving back to the communities where we live, work, and play is good business,” is MK Group of Companies’ philosophy. MK Group of Companies truly does give back to the community in every manner. They are not only involved with Excel Society but with hockey tournaments, Ukrainian Shumka Dancers and many other non-profit groups. The continuing support from Dave Menard, Morris Kadylo, Dale Roy and their team is the key to Excel Society’s success.

MK Group of Companies hosted the 4th annual golf tournament and as 2014 is approaching we are looking forward to the 5th Annual Charity Golf Event. Candace Stewart, part of the MK Group pulled everyone together and helped make the event a success. Candace gathered names, auction items as well as constructed the layout of teams for this golf tournament.

In 2013 the golf tournament was held at the Northern Bear Golf Course. We had beautiful weather with the sun shining and luscious green grass for the golfers. There were over a hundred golfers with various prizes raffled off. Each year the number of attendees grows with the continuing support of MK Group of Companies.

MK Group is known for their Experience, Expertise, Excellence and Leadership in the construction industry. MK Group is available for services in a variety of constructions tasks – from foundations to millwork. They continue to be our go-to experts in regards to Excel’s potential upcoming construction projects.
5th Annual Excel Society Golf Tournament
Saturday, June 7th 2014, 1pm Shotgun.

Hosted by: Sharon Read & Morris Kadylo, P. Eng
www.sturgeonvalleygolfclub.com

Tee Up for Charity!
At $300.00 per person or $1100.00 for four people, your Golf Tournament includes:

1. 18 Holes at the Sturgeon Valley Golf & Country Club start at 1pm shotgun.
2. Lunch available at 11:30am and 8oz New York Striploin steak AAA Canadian Beef dinner starting at approximately at 6pm.
3. All proceeds go to the Excel Society.

Win!

1. Three (3) Hole in One prizes.
2. Fabulous prizes for all participants.
3. A vacation for two at the 5 Star Hard Rock Hotel & Casino or Palace Resorts in Mexico or Punta Cana.

Book Today!

To Register, please call Candace at 780.459.4777 or candace@mkgroupofcompanies.com
Or Charlie at 780.455.2601 ex. 243 or cvermeeren@exelsociety.org
Registration Deadline: Friday, May 16, 2014.
Donations, sponsorships, and gifts are welcomed.
Excel Society sincerely appreciates the grant of $6000 from the REALTORS community Foundation. This grant will go towards a brand new SuzyQ cart for Grand Manor on 97th. This SuzyQ cart will help ensure clients receive hot, fresh and tasty meals for their meal time.

The Realtors Community Foundation has helped the Edmonton and surrounding area charities for over 25 years. This organization is comprised of many realtors and donors with big hearts who make an impact by contributing through each real estate sale or participation in their fundraisers. They encourage charities and donors to “Think Big, Dream Big”. This year they call their grants the “Big Give”.

The Realtors Community Foundation – Edmonton has been a proud supporter of Excel Society for the past 5 years now. In 2013, Excel Society was one of 47 charities who were recipients of grants from the Realtors Community Foundation totalling over $395,000. This foundation provides support for charities working in areas of shelter, homelessness, and other special projects.

Thank you from Excel Society’s board members, staff, and clients! Thank you for making a difference in the community!
One Highlight of 2013 for JMEO was winning the Mayor’s Award for the “Abilities in Action” project. Here are the highlights:

The Excel Society is a non-profit organization that encourages persons with disabilities to achieve personal and community-based goals, while promoting their potential for independent living and community-based employment. The City of Edmonton partnered with the Excel Society for an “Abilities in Action” Employment Experience Program in an effort to increase workforce diversification in the Edmonton Area. Fleet Services Branch staff involved in this program was enriched by the interaction, gained better understanding, and perspective of the challenges facing employees with disability issues in the workplace, as well as learning about the contributions these workers can make.

Another highlight was the Abilities@Work project, also with the City of Edmonton. The City has a strong commitment to supporting a diverse and inclusive workforce and it is working.

Mark Farr, Disability Outreach Consultant for the City comments, “The program is working and we are filling jobs where there is meaningful work that needs to be done!” “The program is really successful and it works well for the City and for Excel!”

Having talked to our clients participating in the program, they are both happy and proud to be working members of their community. That in itself shouts success!
K-DAYS PARADE

The Excel Society has participated in the K-Days parade for the past 10 years. Each year we bring together about 30 clients, each with their own supporting staff and our volunteers for the parade adventure of an hour and a half journey in the Edmonton downtown area.

In 2013, we were given an opportunity from the balloon company affiliated with Northlands to carry an air filled balloon for the parade. For the Excel Society, we had chosen Nemo the little clownfish with a gimped fin. Nemo shows us the enormous potential anyone can have despite their differences from the norm, true spirit of Excel Society – “Enriching Lives by Enabling Potential”.

This balloon was the highlight of the parade for many children and observers. The float was also built to an aquatic theme with fish balloons, majestic paper mache oysters, a live mermaid waving at observers, bubbles rolling off the back of the trailer and the song ‘Under the Sea’ in Little Mermaid playing.

We would like to thank all our lovely volunteers for helping us put together this float, especially the volunteers who carried Nemo the full length of the parade, our very artistic staff member Lorette and our clients whom assisted Lorette and accompanied us for the float ride. Our clients are truly the main focus here at Excel Society and we are very happy having them ride on the float. Client feedback is that they enjoy participating in the parade.

Thank You to Wizard Trailers Ltd., Continental Cartage Inc. and Lil Johns Sign Shop for their continued support and assistance with our entry in this fun event!
December is the month of sharing and joy. The month of December is always a busy month for employees and clients of Excel Society.

Each year, clients and staff look forward to the festive parties and activities around this time. Each residence has their own party celebrating the end of the year as well as the holiday season. Two of our largest activities include our annual GRC Christmas Lunch as well as Balwin Villa’s Family Dinner.

The Gerald Raymond Center is normally a busy place but with the Christmas lunch it is extremely busy. The facility spends days in advance planning for the meal and preparing activities to make this event amazing! Clients sing in choirs, listen and tell stories, and meet Santa. Santa sat down with each client and asked what they wished for in this festive season and handed out small gifts to them.

The management team participated in each event and got their hands dirty by helping to carve the roast and turkey. It was an amazing experience with our senior management team sitting down and getting to chit-chat with families and getting to know our clients personally. Sharon Read, our president/CEO even learned how to sign ‘Merry Christmas’ from one of our deaf clients.

The Balwin Villa family dinner was also spectacular. There were six groups for dinner starting at each half hour point beginning at 5:30pm. The gymnasium was packed with food and guests. The kitchen never fails to surprise with crab legs, lobster tails and many more extravagant items. A mother daughter duo even danced to the festive music and many others took family photos for memories.

For employees with children as well as our child and youth clients we had a Children’s Christmas party. Small gifts for each child attending the event were given by Santa and we had many games like musical chairs and ‘I Spy…’ to keep them entertained. We also had gingerbread cookie making stations where children had the chance to decorate their cookie of choice with sprinkles, icing and candy of choice.

Staff Appreciation also played a large part in our Christmas season. We had staff nomination awards as well as anniversaries for our staff during the Staff Appreciation/Christmas Party. It was a tight scheduled day for the social committee setting up and decorating at the Century Casino. A short game session of ‘The Gong Show’ similar to the X-factor brought out the hidden singing talents of our employees. A night dedicated to the staff to show our appreciation.

December, the month of family gatherings and festive activities was a fantastic way to end 2013. May the events in the future be more exciting and each year top the next!
RESIDENCE 48, COULD IT BE THE FUTURE?

Built by Caliber Master builders Residence 48 is a barrier free home design and knowing the wear and tear that our homes get Excel’s maintenance team upgraded things like wall coverings to help in corridors and hallways. This is a Persons with Developmental Disabilities (PDD) home with 8 clients some of whom are having medical issues that come with aging. We are seeing increases in aging issues involving heart, cancer, diabetes and COPD. These issues are not at the stage where hospital care is needed but they are requiring varying degrees of medical support.

Based on the changing health issues we have now staffed house 48 differently making it a ‘hybrid home’. Where at one time, Health Care Aides were not available in PDD homes, the extra care requirements have brought them in on a pilot project basis. The 8 client rooms make 48 our biggest PDD home. The clients in this home are peer matched (assessed as being able to get along together) and there are no complex needs or behavioral issues. Being high functioning they are active out in the community, they are involved in menu planning and making arrangements for special birthday parties together. These clients have substantial involvement in the running of their home.

There is extra staffing to handle the client needs and the team works well together in what is not your typical home. It helps that the Residential Care Coordinator (RC) Denise Monson is nearing completion of her training as a Registered Nurse. “When we started looking at the needs of our clients it was clear that they would benefit from a higher level of care.” Says Denise. She continues, “What started out as a planning step has evolved into a pilot project with PDD, as a test case for aging in place for some of our clients.”

Is this the residential care model of the future? Excel’s care of clients has always evolved to meet our client’s needs and over the past 50 years we have learned that if it is good for our clients it will probably come to be. Especially as we enter our next 50!
YOU MAY SEE OUR BIRTHDAY VANS!

Everyone at Excel is proud as we approach our 50th Anniversary and Excel’s Maintenance department is no exception. The attached pictures show one of our vans decked out for our 50th. They are making a mobile statement to that effect to all of Edmonton as they drive around providing maintenance to our 36 residences, two Designated Living Sites, and the Gerard Raymond Centre.

Back in March 2013 our contract maintenance company decided not to renew their contract so we made a strategic decision to tackle our day to day maintenance internally. Director of Facilities, Dawne Lonsdale and Ray Dorfman, Maintenance Administrator began to recruit capable trades people and we were off to the races so to speak. Today we have three trucks and six people dedicated to fixing problems in plumbing, electrical, carpentry, flooring, locks, windows and many others as they say in the commercials.

After our first year of internal maintenance we have responded to 2000 calls for repairs and it seems they are performing well. Sue Kovich, Director of Community Services for Excel says,

“Our maintenance people are doing an excellent job of keeping us running and doing the preventative things that save us money!“ Congratulations to the Maintenance Team and hey guys you have great looking trucks!!
The year 2013 marked many milestones in Excel Society’s history. One of these milestones include an addition of a facility called Clubhouse 55, a day program developed for seniors.

This program was developed to focus on the unique needs of the 55+ community. Interests of younger adults are not the same as adults whom are 55+, music interests may be different, hobbies and habits may be different.

This facility focuses on community based recreation and leisure opportunities which features a more mature and relaxed environment. This program’s main focus is to connect in meaningful ways to the larger community. It includes making and keeping friends, participating in meaningful recreational & leisure pursuits and/or contributing back to the community through volunteering.

The grand opening of Clubhouse 55 was in December 2013. Invitations went out to neighbors, friends, family as well as government officials to join us in celebration of the event. The opening ceremony was filled with many snacks and drinks.
If there was one word to describe the application of technology as a tool at Excel, it is the word “change”. If there were two words to describe technology use in Excel, they would be change and growth. We have come a long way at Excel with the adoption of technology as a tool for improving service delivery. Like many in the health industry, we had modest beginnings with skeptical staff many years ago using desktops for paper work and data storage. Staff has now come to accept and even embrace the use of technology, recognizing it as a key tool in improving their ability to provide better care.

Excel’s technology network now spans over 45 different job sites in 2 cities, servicing more than 400 staff with over 200 pieces of computing equipment ranging from servers, network appliances, desktops, laptops, tablet and mobile devices, over 10 software applications, multiple websites, payment systems, security systems, nurse calls systems, telephone systems and backup systems. All this equipment is combined to provide the technology backbone that helps Excel staff accomplish their day to day service delivery in a successful and efficient manner.

With the leadership and vision of senior management, Excel has been able to adopt industry leading new technology such as Catalyst, an online medication administration and tracking tool, virtualize its server backbone for a more stable and reliable computing environment, and continuously view technology as a necessary tool in service delivery. In the future, the adoption of other software tools will reduce physical paper documentation and improve therapeutic outcomes as data is tracked more efficiently.

Over the past year, Excel has been able to expand its deployment of Catalyst medication administration software to all of its facilities, replace key networking hardware, upgrade workstation operating systems and hardware, designed, developed and deployed a new Academy website and replaced the phone systems for 2 of our office facilities to IP based systems. These improvements have enabled our staff to work more efficiently, enhanced the stability of our backend systems, and expanded the robustness of staff communication. At the end of the year, we were also fortunate to be able to start on the project of developing a new updated website, a project that is part of our 50th anniversary celebrations.

All this improvement wouldn’t be possible if not for the support of our board of directors, senior management, funding sources, consultants and most of all, our staff who are always willing to learn and be open to change. Thank you and we hope to have another great year!!!
Excel’s Recreation and Leisure Department mission is to inspire, engage, and validate individuals through positive experiences by utilizing their skills and talent, empowering them to discover what makes their lives meaningful. Our overall vision is cultivating well-being through meaningful experiences.

Therapeutic Recreation and Leisure Services helps our clients see their potential, and improve their quality of life through Recreation and Leisure. We increase our client’s quality of life through social support, and community involvement within Edmonton and within the Excel Community.

Currently we offer Recreation and leisure programs to our Community Living Residents, Day Program clients and Designated Assisted Living (DAL) residents. Besides in house programs, Excel also partners with other Edmonton organizations to offer wonderful and exciting activities for clients.

2013 has been another fantastic year full of fun adventurous opportunities for the Excel Society day program clients & staff thanks to a great partnership that the Excel Society formed with the Canadian Paraplegic Association’s Adapted Adventures program! A handful of Gerard Raymond Centre clients with a variety of barriers (ie. legally blind, autism, etc.) reached great heights in rock climbing both literally & in terms of pride in themselves during our beginner & intermediate level rock climbing courses. As staff, we enjoyed encouraging, assisting & motivating clients on their climbs & a few times clients asked us to race them in climbing up the wall! What fun that was! It was amazing to see just how far each of them came, the excitement they had in reaching the top & also the drive they had to continually challenge themselves to more difficult walls or to time their ascents when they wanted to challenge their own times! One client even learned how to belay (take care of ropes) as I climbed the wall! Another program highlight of the year was our canoeing class at Kirk Lake. A few Clubhouse 55 clients teamed up with some clients from the Gerard Raymond Centre to try canoeing for the first time! The fear was unnerving at first for some clients & one of our staff members but it wasn’t long before they each found their stride & were gliding along Kirk Lake with ease, utilizing the paddling skills they learned. All of us had a great time on the water canoeing & one from our group even ventured to give kayaking a go & just loved it! Encouraging people is rewarding, it helps remove barriers and increase confidence all within the scope of “fun”.

![Canoeing at Kirk Lake](image1.jpg)

![Rock Climbing](image2.jpg)

![Kayaking](image3.jpg)
Excel’s Human Resources department ensures that there is appropriate staffing for all services and programs that Excel provides. We have continued success with our job fairs each bringing in approximately 150 applicants. From these we typically hire 35 Employees. Written and spoken English is important in our field and this is often a stumbling block for some applicants.

We continue to receive feedback from our employees through New Employee Feedback Sessions and survey’s. Human Resources has started a new project, Employee Engagement Sessions, that involve employees who have been with Excel for over two years. The following topics are discussed during the Employee Engagement Session:

- Strengths of Excel Society
- Training
- Recognition
- Work environment
- Opportunities for growth
- Areas of improvement

Over the year, we have heard from our employees that Excel Society provides excellent training for staff. Employees have also mentioned that there is diversity, appreciation, and team work.
EXCEL KEY MILESTONES

1964
Excel Society began as The Sheltered Workshop, a pilot project of Alberta Hospital Edmonton. Fifteen patients and two staff established a work and life skills program in the basement of Robertson United Church.

1968
“Sheltered Workshop Society” was incorporated as a non-profit society. Fifty clients were active in the program.

1991
The “Sheltered Workshop Society” was renamed the “Excel Resources Society.”

1995
Residential Services began with the acquisition of 8 homes from the Inner-city Crisis Services Centre. Deaf Support Services, Avenues to Community Inclusion, and the Excel Discovery Centre were initiated.

1997
Kedros Furniture Inc. was established to oversee the furniture manufacturing as a For-Profit Commercial Trust with Excel Society as the Beneficiary. Excel Programs were awarded Full Accreditation with the Alberta Association of Rehabilitation Centres (AARC).

2000
The Excel Academy was established as a Private Vocational School registered with Alberta Learning, offering training through the Community Support Worker Certificate Program. Excel Residential Services expanded to 36 homes in Edmonton and surrounding areas. Supported Independent Living Placements grew to 65 throughout Edmonton and area.

2002
Excel opened a new barrier free home. Excel Society adopted a formal Risk Management Plan. Excel received CET certification through AARC. Grand Manor residential project, a 56 unit apartment hotel with support services for clients with mental illness, began construction. Person Centered Planning creates renewed focus on client choice and involvement in decision-making.

2005
Opening of Grand Manor on 97th, a 56-unit apartment hotel for people with mental illness and in threat of becoming homeless. Opening of two group homes in Calgary funded through the Calgary Region PDD Community Board. Pharmacy Services tendered with Nolan Drugs receiving the contract for services. First phase of NAIVISION finance software implemented. Employment Training and Placement Centre renamed the John McGee Day Options Program. Excel Society receives Creating Excellence Together Certification and three year Accreditation through the Alberta Association of Rehabilitation Centres.
Excel Society signed a contract with Children’s Services for a Youth Program.
Excel held its first major fundraising event, the EXCELErator in partnership with Northlands.
The Calgary office was opened.

2007

Construction of Balwin Villa began, a 105 unit enhanced assisted living facility for people with brain injury and early onset of dementia with Canadian Western Bank financing.
Homeward Trust contributed $200,000 towards the building of a special care home for individuals with a mental illness which opened in June.
A Children’s services home was opened.

2008

The lease to purchase agreement for the North Edmonton School site was finalized with the Edmonton Public School Board, and contracts signed off for the redesign and building of Balwin Villa, a 105 suite enhanced designated assisted living site for brain injury and early onset of dementia.
Ground breaking ceremonies for beginning of construction of Balwin Villa were held in August with several MLA’s and City Aldermen attending.
Excel began construction on a new special care home for clients with mental illness at risk of homelessness.

2009

2010

Excel Society received $7.1 million through the Alberta Seniors Living Initiative (ASLI) grant and opened Balwin Villa in September 2010.
The President’s Award was initiated for the first time at the Staff Appreciation.
A new fundraiser golf tournament was initiated by Shearwall Triforce.
Excel Society invited to join the Institute of Continuing Care Education and Research (ICCER).
Strategic Planning sessions with staff and Board developed three year business plan.

Implemented a Catalyst Medication Administration System at Balwin Villa.
Purchase a new home in Calgary.
Acquired a new contract with Northwest Territories.
Received two year licensing in a number of the personal and special care homes.
Opened a Clubhouse 55 for clients who are seniors.
Received approval for the expansion of Grand Manor.
Received Accreditation through the Alberta Council of Disability Services for Persons with Developmental Disabilities funded programs for another three years.

2011

Implemented Catalyst at Grand Manor, an electronic medication administration system.
Grand Manor celebrated their fifth anniversary.
Completed upgrades to the main floor of the Gerard Raymond Centre.
Launched the “Excel at Home” – Home Care and Home Support Program out of Grand Manor.
TN Active Care was successfully implemented at the Gerard Raymond Centre.
Excel Society received three year Accreditation from Alberta Council of Disability Services for the PDD funded program areas.
Excel Society passed all reviews and inspections by Alberta Health Services on all homes and Grand Manor.
John McGee Day Options signed an agreement with the City of Edmonton for clients to work in the Bus Barns.
Excel Society reached a milestone of 500 employees.
FINANCIALS - 2013

REVENUE

Persons with Developmental Disabilities ........................................................ 29%
Alberta Health Services ................................................................................... 41%
NWT ................................................................. 6%
Children’s Services ............................................................................................ 3%
Rent and Food Services .................................................................................. 16%
Other Grants, Sales, Fundraising ................................................................. 5%

EXPENSE BY STRUCTURE

Community Support Services ................................................................. 91%
Built to Learn ............................................................................................... 2%
Excel Academy .............................................................................................. 1%
Administration ............................................................................................. 6%

EXPENSE BY CATEGORY

Service Delivery Manpower ................................................................. 71%
Facility ............................................................................................... 15%
Program ............................................................................................... 7%
Education and Training ................................................................................ 1%
Administration ............................................................................................. 6%
DONATIONS LIST

PLATINUM SPONSORS - $25,000+
Nolan Drugs – Zaher & Mohib Samnani

GOLD SPONSORS - $10,000+
Dale Corse
Natasha Stenzel-Bourbeau Real Estate
Realtors Community Foundation

SILVER SPONSORS - $5000+
Edmonton Castledowns Lions Club – Michael Danilowich
Order of Eagles #4241 Club – Janet Berg
MK Group of Companies – Dave Menard

FRIENDS OF EXCEL– $1000+
McNish Steel – Betty Tyshe
McGee Richard LLP – John McGee
Ethos Engineering Inc. – Jason Bykewich
Procor Limited – Anna Lazaroff
The Co-operators – Jesse Bjounson
Rose Mandelin
Sharon Read

KINDNESS OF HEART - $500+
ACS Framing – Chris Goodleaf
All Construction Solutions – Stephen Susakakis
Alliance Ready Mix Concrete – Steve Gosby
Triforce Construction – Dalton Kadylo
Cuthbert Smith Group – Soug Moller
Muttart Foundation
Reed Jones Christoffersen Ltd. – Loretta Scobey
Mary Marshall LLP
ATB Financial – Ryan Stark
Blanket Insurance Ltd. – Gloria Anderson
Careers in Transition – Garry Rentz
Gyro Club of Edmonton – Gary Campbell
Heavy Metal Equipment & Rentals – Jesse Van der Werf
Interscape Interior Design – Mary Gerrard
Paragon Mechanical Ltd. – Cindy Rose

Peterson Walker LLP – Tom Gee
PharmaCare – Ryan Stempfle
Raywalt Construction Co. Ltd. – Ron Johnson
Sheppard Insurance Service Inc. – Scott Zurfluh
Storage Solutions – Patricia Long
Wawanesa Mutual Insurance Co.
Kaye Langager

SUPPORTERS
Global Wealth Builders – Bruce Sansom
Caliber Master Builders – Jill Lovelock
Backstreet Gifts & Antiques - Shelagh Slater
Kompleat Building Services – Miguel Chocair
McLean & Shaw Insurance Inc. – Cheryl Talbott
The Rock Salon and Spa – Chantelle Christensen
Alberta Benefits Ltd. – Jim Burns
Carol Blair & Associates – Carol Blair
Black Bull Golf Resort – Judy Wyley
The Brick – Charlene Lalonde
Manshield Construction – Lisa Schwind
Natcon Construction – Kevin Pytel
Smith & Anderson – Donald Fox
Paragon – Dave Holland
Country Sampler Home Décor – Teresa Thompson
MNP – Samantha Alexander
Coinamatic – Angelo Santucci
RBC Foundation
Simplex Grinnell – Kim Facey
Bella Casa Design Centre Ltd. – Karen Visser
CIBC – David Purcell
Milestone Insurance – Alwin Slbilo
Stuart Ross
Jeff Grobman
Marshall Tittemore Architects - Gordon Franklin
Chris Rymer
Osmond Auction Co.
The Excel Society will be reaching the half century mark in 2014 and to say we are proud is a huge understatement! Literally, Excel had small beginnings in the area of human services, with only a few clients on a day program basis back in 1964.

The idea of a Not for Profit agency would evolve, but the initial identification of need came from Alberta Hospital Edmonton. Doctors there felt it was time for some of their patients to reintegrate back into the community. At first it was a day-by-day program model that would develop and grow into today’s Excel Society with more than 500 staff and a tremendous variety of choice for clients in accommodation, services and care.

While formal recognition plans are developing under wraps for 2014, you can rest assured that those plans will see involvement by clients, staff, our neighbours, our community and funding partners. We will be reaching out in all directions thanking those who have helped. At the same time, we will be inviting others, interested in our work with vulnerable Albertans, to join our team in supporting and caring for this sector of our community.