



2021 Annual Report



SouthWest Edmonton - A Great Place to Be 55+

President's Report

Submitted by Josie Richardson

After a rough 2020 during the pandemic's first wave, 2021 showed signs of normalcy due to access to vaccines and high vaccination rates. This was soon followed by big setbacks after the emergence of the Delta variant in July and the Omicron variant in November. As an association with an at-risk population, we were on high alert. Many of our members expressed missing SWESA but were cognizant that COVID-19 continued to be a threat. In addition to being closed to in-person gatherings for most of the year, other challenges included staff recruitment. We were happy to welcome Linda Klatt as business manager and April Williamson as program coordinator in August.

SWESA operational expenses were kept to a minimum. From January to September, we rented only administrative space at Blue Quill Community League. The hall rental was covered by a grant from the Edmonton Community Foundation. Leases for Yellowbird East Community League and in the Terwillegar Community Recreation Centre commenced in September. This was the first year that SWESA offered full-time programming and activities in multiple locations. Thanks to staff and members who volunteered as Front Desk Volunteers and Activity Hosts, we were able to get all sites operational in no time. Work continues on streamlining procedures.

One of the Board priorities this year included keeping abreast of city and provincial initiatives. The Edmonton Seniors Coordinating Council has been tasked by the City of Edmonton to develop a framework to support the coordination of services for older adults. Key learning from this framework is that it is imperative that SWESA work on developing partnerships and collaborations. Reporting criteria to the City of Edmonton and other funders has changed to include the requirement of providing metrics that measure social return on investment. These measures are based on The Determinants of Healthy Aging as outlined in The Healthy Aging Framework, first developed in 2007.

In conclusion, I wish to express my heartfelt appreciation to the SWESA Board of Directors, as well as to all SWESA members and volunteers for their patience, support, and hard work during yet another challenging year. Thank you to our staff Linda, April, and Barbara for their perseverance and dedication. I would also like to express my gratitude to Catherine Hammond who was instrumental in navigating SWESA through a very turbulent 2021. In addition to her role as treasurer, she took on many of the administrative duties, applied for government subsidies, and prepared many grant funding proposals. I can't thank her enough.

Board of Directors



Josie Richardson
President



Catherine Hammond
Treasurer



Judith Abbott
Secretary



**Eustace (Tony)
Montrose**
Director



Thomas (Pat) Wren
Director



Vicki King
Director



Lynn Masters
Director



Jaques Magnan
Director
(Resigned)



Brian Neville
Director
(In Memoriam)

SWESA STAFF

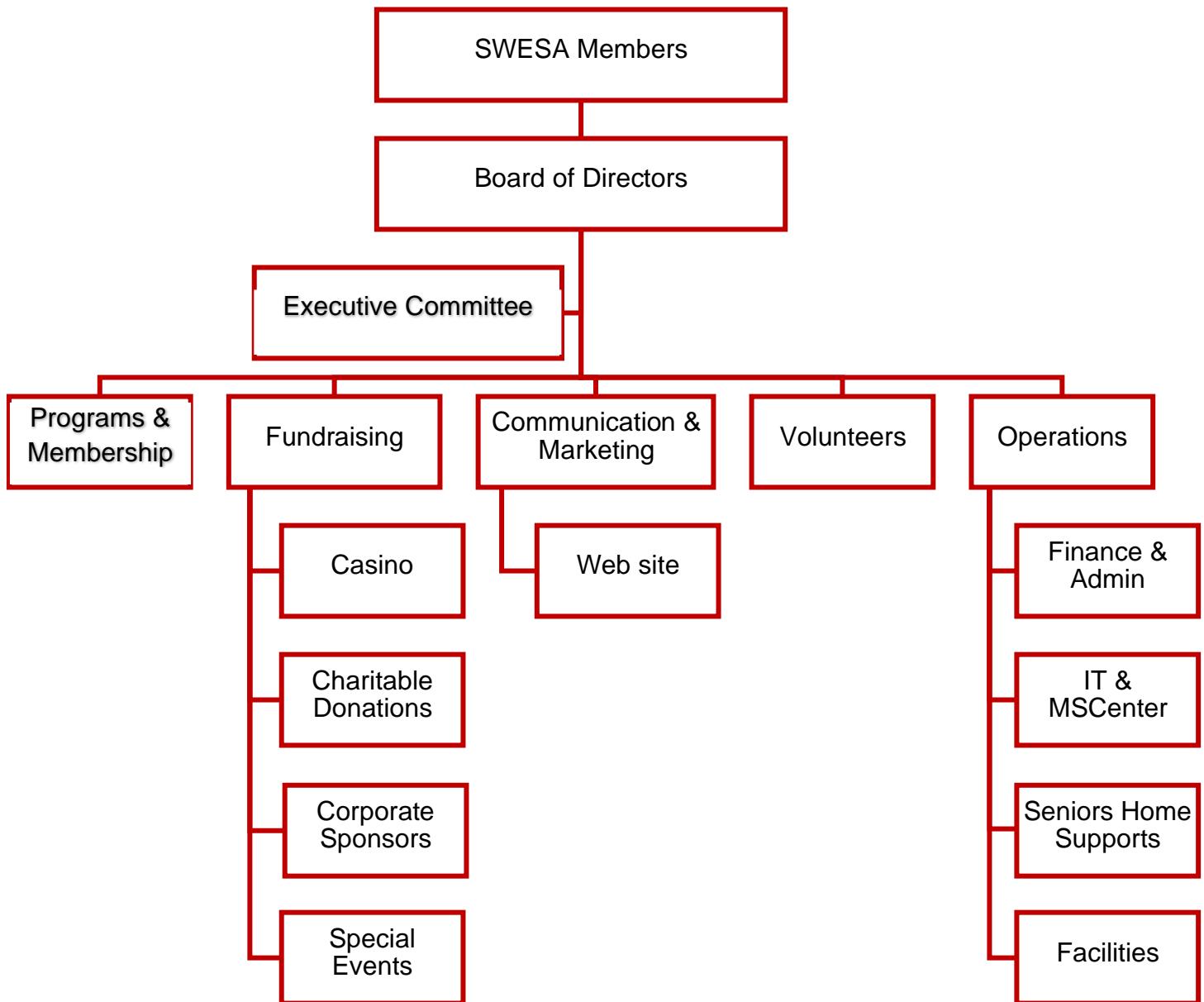


April Williamson
Program Coordinator
780-860-2856



Barbara Newell
Seniors Home Support
Coordinator
780-860-2931





Vision

SWESA is a progressive organization creating a vibrant, welcoming, age-friendly community.

Mission

As a member-driven organization, in concert with community groups and partners, SWESA empowers older adults in Southwest Edmonton to be active and to be socially engaged through quality programs and services.

Core Values

Collaboration: working with others to achieve mutually beneficial goals

Respect: valuing self and others

Inclusion: creating an environment of acceptance, engagement and connection

Accountability: responding to the needs of our members and communicating in a transparent manner

Innovation: exploring new ideas

Treasurer's Report

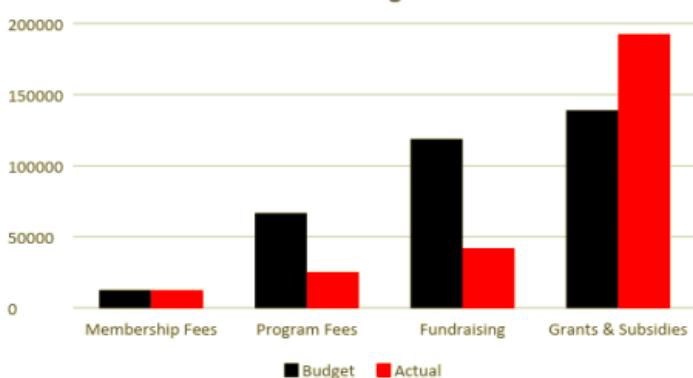
Submitted by Catherine Hammond

With the continuation of the COVID-19 pandemic, 2021 was another year of operational and financial uncertainty for SWESA. Budgeting was very difficult as we tried to be hopeful that programs would resume and cautious in our expenditures. Fortunately, SWESA qualified for a number of grants and subsidies from the provincial and federal governments which provided a financial cushion for 2021. An Operating Reserve fund was formally established and consists of funds invested in GICs. The initial target for the reserve fund is 6 months of normal operating costs and we are approximately 50% of the target.

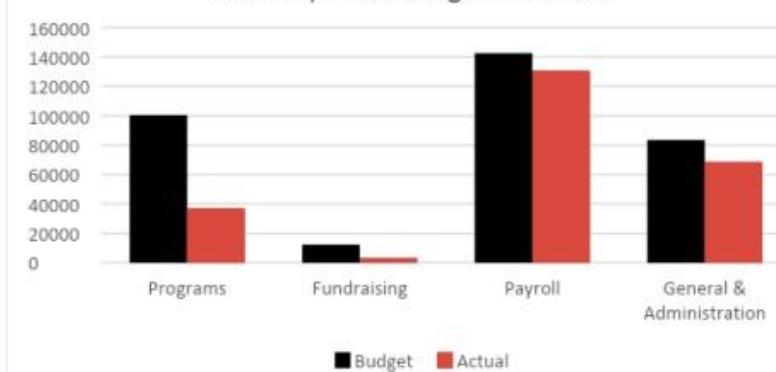
The audit was conducted by Doyle & Company; complete 2021 Financial Statements are on the website.

2021 Revenue and Expense Summary		2021 Financial Position Summary	
Total Revenues	\$276,422	Assets (Cash, GICs)	\$313,012
Total Expenses	\$244,197	Liabilities	\$122,801
Net Income	\$32,225	Net Assets	\$190,211

2021 Revenues Budget to Actual



2021 Expenses Budget to Actual



Programs & Memberships

Submitted by Judy Baker

Due to COVID-19 restrictions and shut-downs, programs were held virtually for most of the first half of the year. Virtual programs included webinars, Toonie Talks, coffee and chat, fitness programs and art classes.

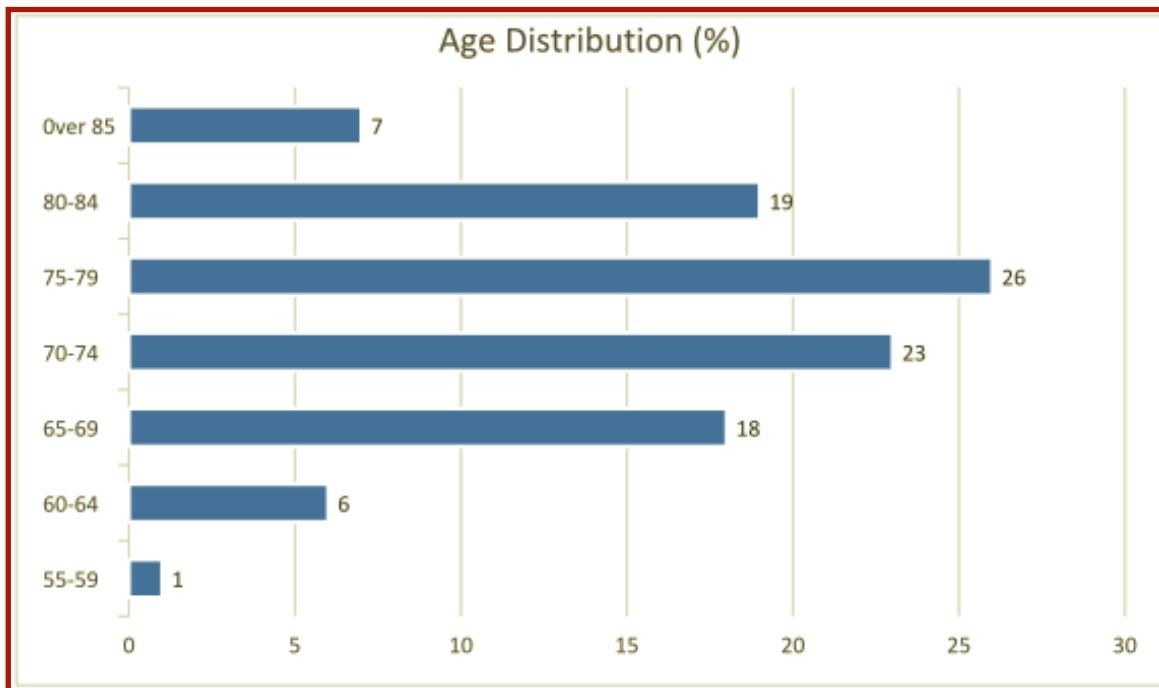
In June, in-person programs started at Blue Quill Community Centre with fitness, walking group, book club and coffee and chat. Programs were expanded in September to include more variety and to add programs at Yellowbird East Community Centre and Terwillegar Community Recreation Centre. In total, we were open for in-person programs for 29 weeks during the year.

The number of individuals who participated in any program during the year was 302, representing a 65% participation rate. Our busiest months were November and December, possibly because people felt safer in public by that time.

We offered a variety of programming: 11% arts, crafts and hobbies, 23% cards and games, 38% fitness, 2% general interest, 25% social.

Our membership was 80% female and 20% male, percentages that were mirrored in the age distribution of persons attending programs.

At the end of 2021, we had 467 members, down from the previous year. During the year we attracted 67 new members (92% female, 8% male). Age distribution is shown below.



Volunteer Report

Reported by Catherine Hammond

SWESA volunteers are the backbone of the organization. Without their enthusiasm, hard work and support, SWESA simply could not exist. From those who help set up for programs, greet people at the reception desk, act as volunteer hosts, work on committees and serve on the Board, all are volunteers who make SWESA a vibrant grassroots organization.

Despite the COVID-19 pandemic suspending most of our programs and social activities for half of the year, volunteers remained a vital part of what we were able to do. In 2021, 73 SWESA members volunteered 5,480 hours of their time.

In July, as we all started to come out of our cocoons, 33 SWESA members and friends participated in training and volunteered at Taste of Edmonton, putting in a total of 532 hours. This activity raised \$4,277 for SWESA.

Our front desk reception and activity host volunteers supported our staff by contributing 698 hours, largely in the last 4 months of 2021 – that's the equivalent of a full-time employee! Throughout 2021, the Board of Directors and Committees continued to meet through Zoom. Despite the limitations of the pandemic, these committees raised funds, hired and oriented staff, created newsletters, maintained our website, supported our staff in various program development, and so much more. A big thank you to all!



Fundraising Report

Submitted by Tony Montrose & Rob Agostinis

2020 and 2021 were very challenging years for SWESA's fundraising programs. We are pleased to report that in spite of all the COVID-19 restrictions of the pandemic in 2020 and 2021, SWESA did very well with fundraising. We were able to accomplish the following:

❖ Mother's Day 50/50 Raffle

SWESA Fundraising Committee had a Mother's Day 50/50 Raffle, which ran from March 17 to May 08, 2021, on Mother's Day. After all expenses, the winner got \$2,000.00 and SWESA got \$2,000.00

❖ Taste of Edmonton 2021

SWESA members volunteered at the Taste of Edmonton festival, as a fundraising project, for four days in July 2021. For the services provided by our volunteers, SWESA received the sum of \$4,277.00. Our members had a great time at the festival, and thoroughly enjoyed the experience.

❖ Annual Appeal 2021

The 2021 Annual Appeal campaign was held in October - November 2021. The Annual Appeal was yet again a success. 2021 had an anonymous donor who pledged \$10,000 as a matching gift. Our members responded to the challenge raising the first \$10,000 and continued to reach \$32,078.

Our thanks go out to the generous anonymous donor, the SWESA members who donated, the volunteers and staff who worked hard to make this a success, with a special thanks to Michael Bull the lead.



Mothers' day 50/50 Raffle draw
May 08, 2021

Tony Montrose, Bob Power, Eliza Encenarial and Rob Agostinis,
Fundraising Committee and Charity
50/50 representative



Taste of Edmonton 2021
SWESA Volunteers are seen here
in blue t-shirts.

Communications & Marketing Report

Submitted by Kathy Trepanier

The Communications and Marketing Committee (CAM) was chaired by Kathy Trepanier, reporting to the Board through Josie Richardson and linking to staff through Linda Klatt. The other ten committee members provided a wide variety of experiences and talents. CAM work in 2021 focused on Board priorities of: raising awareness among other organizations, supporting relationships with elected officials, recruiting a full board, supporting Board Committees, and supporting board communication back to members. Highlights of 2021 included:

- ❖ SWESA News was created as a means for the Board to communicate to members. The mail-out of the first issue in April 2021 was well received.
- ❖ Mastheads were developed for SWESA News and the SWESA Weekly Bulletin to strengthen organizational branding.
- ❖ Key messages (both descriptive and strategic) were developed and will be updated regularly. They were given to the Board, staff and Committees for use in written and messaging about SWESA.
- ❖ The SWESA Website continues to rate highly in terms of views per content and photo pages. Barry Headrick, SWESA Webmaster, converted the website to Block Editor, a move which was necessary to maintain editing support. Barry has been training all new staff in Block Editor and use of the photo library SmugMug.
- ❖ The SWESA pamphlet was revised (stock of the previous pamphlet was depleted). The pamphlet was designed for use when SWESA is raising awareness with other organizations. A printable PDF is on the website.
- ❖ CAM explored the potential of a SWESA poster to reach the general public, but because of the pandemic there was low to no interest in the places surveyed (physician offices, labs, senior's residences). This will be reviewed later.
- ❖ Through CAM writer Colleen Crozier, regular Seniors Columns, featuring SWESA, were written for the *Riverbend Ragg Times* and *Terwillegar Tribune*, reaching over 10,000 homes. We expanded to the *Duggan Details* newsletter and continue to seek other smaller community newsletter opportunities to reach out to seniors.
- ❖ CAM supported the Fundraising Committee campaigns through print and online materials to promote the first online 50/50 Mothers 'Day Raffle and the Annual Appeal.
- ❖ CAM developed a Stakeholder List with all the organizations and individuals with a potential interest in SWESA. It will be used as a tool to determine target audiences for various initiatives.

Seniors Home Supports Program

Submitted by Josie Richardson

The Seniors Home Supports Program (SHSP) continues to create a positive impact across a variety of demographic vulnerabilities for Edmonton seniors. The program offers all individuals aged 55+ referrals to vetted service providers.

The SHSP offers support in areas of the individual's physical environment, personal wellbeing, and referrals to social support services. It increases resiliency and the ability to age in place safely for a longer period of time.

In the summer of 2021, the Edmonton Seniors Coordinating Council (ESCC) engaged KRD Consulting Group to design and implement an evaluation and research project to better understand the impact of the SHSP on participants' lives. The data found that SHSP clientele experience multi-factor or intersecting vulnerabilities. The 80-99 years of age are frequently the largest segment of the user base. It is overwhelmingly utilized by females. Of these females, 59% reported living alone and 43% of females who live alone are also low-income.

One of the evaluation cohorts of the research project were repeat users of the program. The participants interviewed reported that they experienced a sense of inclusion, independence and most of all the peace of mind in being able to age well in their community. Working closely with the program coordinator and having access to outreach programs also improved the lives of the participants.

In 2021 there were increases in use of the program. The largest increase was in repeat users at 45% over 2020. Trust in the program and having a relationship with the home supports coordinator were identified as being a key to the program's success.

To address the challenge of the lack of affordable services for low-income seniors, especially snow removal services, the SHSP coordinators reached out to the community. In 2021 the SHSP connected with the U of A Campus UNICEF club. This group of students shovel snow for seniors for free or by donation. Another alliance is with Elders and Angels. In addition, ECSS advocated with the City of Edmonton to continue to provide snow removal grants to the SHSP and to community leagues.

The SHSP is funded by a grant from Family and Community Support Services (FCSS) and administered by the Edmonton Seniors Coordinating Council (ESCC). Thank you to Barbara Newell, our SHSP coordinator, for her hard work and commitment to the seniors of our community.

"I had no idea how to get help. Going to the SWESA centre and speaking with Barb, the Home Supports Coordinator gave me options. She made me feel like I was important, and that help was available. Grateful for this kindness. Thank you." E.G.

SWESA Operations Report

Submitted by Thomas (Pat) Wren

SWESA has made a number of improvements in the operations of the organization over the past two years.

MySeniorCenter (MSC) has become the base for support of our membership and the events we schedule each year. The database has been updated to include vital data that drives the best reports. Our staff and volunteers have spent many hours reviewing and enhancing information that allows the Board to prepare the most accurate and comprehensive reports.

A master plan has been developed to organize and store critical data for SWESA with appropriate controls for access and availability. Our focus continues on data security and encryption of critical data that is sensitive to our membership with controlled access. The plan includes a data backup structure to preserve historic information including data, pictures, documents, and reports.

In early 2021, we introduced the ability for members to enroll and pay online using a highly secure 128-bit encryption security protocol with MSC Support and Moneris (Canadian banking online system provider for secure credit and debit card payments). When a user selects an event, it is loaded into a personal “shopping cart” and when the user “checks out” they are transitioned to a payments page where they can securely enter their credit card information to process their payment.

As well as the system changes, we have spent multiple hours confirming our financial records and validating that the MSC System and our financial system are in sync to track all financial transactions we complete. Staff continue to update the operation manual and, with volunteers, focus their attention on data entry for new members. During 2021 the team validated membership information entered in the MSC system.

Overall SWESA continues to improve its operation through all of these efforts. In 2021 SWESA hosted over 7,900 hours in scheduled virtual and face to face events. As COVID-19 restrictions are eased we anticipate participation levels in 2022 to be similar to what we experienced in 2018 and 2019.