

It was a particular struggle this year to get to an AGM. As you all know the purpose of an AGM under ONCA is to approve the annual audited statements. We can only do this if the audit is done in a timely manner and the auditor needs a couple of months to do this work. If materials from the branches are not received in a timely manner, it sets the entire process back. This year, although the deadline for materials was February 18, branches were still sending paperwork to us up to two weeks ago (!). As you know ACO was under a supervision order with CRA because we were not getting things done properly and in a timely manner. CRA will only allow ACO to continue to operate if we continue to meet all the requirements within that contract.

Thanks to Marie and Tai who worked very hard along with me to get this done. Also, thanks to the many branches who got their information in to us in a timely manner. Your work makes things so much easier for us at audit crunch time.

We continue to try to improve our processes and have received much praise from the auditors and from CRA for some of our innovations. I'm proud of the work we have done to move this organization forward.

Other reports from staff:

Programs:

For the year 2024, Alex planned, coordinated and did follow-up for Heritage Action Day and the Heritage Awards. For the latter this included creating and managing content for the Awards website and social media. Alex produced the monthly Acorn in a Nutshell and the ACO Branch year in review. Alex supported the meetings and work of the Policy, GCR and Education committees, including for the campaign to extend the listing deadline. Alex worked with Richard Longley to update Interventions to Protect for the ACO website. As well as managing the volunteers and questions about PreservationWorks!, Alex regularly responded to requests and questions from ACO members and the general public.

Membership

Tai So, Membership Coordinator and Marie May, Bookkeeper, will continue to meet with branches virtually again this year. This creates an opportunity for branches to ask questions, discuss membership and set up training sessions for the database and DropBox. DropBox has created an efficient

and convenient system for gathering information that is easily accessed by the branches and the auditors.

One of the biggest challenges of working remotely is creating manual tax receipts. (The process includes, gathering the transaction information from the branch including the bank statement, uploading to DropBox for the auditors, creating the manual tax receipt, printing a copy. driving it to the COO to have him sign it, then driving to the Bookkeeper and if they are no errors she will upload it to DropBox for the branch membership coordinator to distribute to the member.) This process can take upwards of 4 weeks whereas, the ACO website sends out an automated tax receipt within a minute directly to the member once the transaction is complete.

Tai will continue to encourage branch membership coordinators to have their members renew using the ACO website.

Fundraising:

Adrian sent the annual appeal letter by email in 2024 as Canada Post was on strike. This saved money and was opened by more recipients than the previous year's direct mailing. Receipted donations for the year slightly topped \$15,000, while outreach for Heritage Awards sponsoring raised \$22,000 – more than triple the previous year's pledges. The ticket sales were also good, and we recouped several thousand dollars more than the event cost. Adrian ensured the sponsors were recognized through quality ads in Acorn, although ad sales were minimized by delivery uncertainty. Also for the magazine, Adrian wrote a tribute to all friends of heritage conservation, with a plea to ACO members to recruit new allies. Other tasks were researching and applying for several grants, and were won new OAA support. Other documents included a website overview on planned giving and gifts of securities.