

Carers Victoria

ANNUAL REPORT
2008 - 2009

WHAT
CARERS
WANT



Carers Victoria is the statewide voice for family carers, representing and providing support for carers in the community.

OUR VISION

Caring is a shared community responsibility

OUR CORE BUSINESS

- ▶ Carer advocacy and representation
- ▶ Research and policy development
- ▶ Carer services and programs
- ▶ Education and training - for carers and for workers in the care system
- ▶ Influencing change in the services and institutions that support carers

THE CHANGES WE WORK FOR

Carers enjoy improved health, wellbeing, resilience and financial security

- ▶ Access to high quality and flexible services
- ▶ Choice in caring and support options
- ▶ Improved carer entitlements
- ▶ Choices and balance in work and family responsibilities

Caring is recognised as a shared responsibility of family, community, business and government

- ▶ Increased public awareness of caring and carers' issues
- ▶ Health and community care services are carer inclusive, responsive and well coordinated
- ▶ National carer legislation and policy
- ▶ Increased government, community and corporate support for carers

OUR BOARD



Trevor Aronson (Treasurer)

Board member since 2009.
Committee member: Business Management; Audit and Risk.
Principal of Positive Outcomes (financial services industry); Graduate Australian Institute of Company Directors.



Peter Kent

Board member since 2006.
Committee member: Marketing.
Managing Director of Porter Novelli, part of an international marketing communications group; Member Australian Institute of Company Directors.



Michael Beres

Board member since 2004.
Committee member: Marketing; Strategic Directions.
Carer; Business Manager at Good Shepherd Province Aust/NZ; Leadership Victoria Williamson Fellow.



Mary Anne Noone

Board member since 2005.
Committee member: Board Development; Rules Review.
Former carer; Senior lecturer, School of Law at La Trobe University.



Briony Dow

Board member since 2008.
Committee member: Rules Review.
Carer; Director of the Preventative & Public Health Division of the National Ageing Research Institute.



Anne Oakley (Vice-President)

Board member since 1997.
Committee member: Strategic Directions; Remuneration; Audit and Risk; Business Management; Rules Review.
Carer; Manager at Melbourne Citymission Palliative Care Service.



Sandra Hillard (Secretary)

Board member since 2007.
Committee member: Business Management; Audit and Risk.
Former carer.



Valda Pugh

Board member since 2000.
Committee member: Board Development; Business Management.
Former carer.



Helen Johnson

Board member since 2005.
Committee member: Board Development; Strategic Directions.
Carer; Parent Support Worker Association for Children with a Disability; Carers Australia Vice-President.



Anne Tuohy

Board member since 2001.
Committee member: Strategic Directions; Rules Review.
Former carer; Policy and Research Coordinator, St Vincent de Paul Aged Care and Community Services.

PRESIDENT'S MESSAGE

Last year we commented on the increased profile of family carers. This year it is safe to say that carers are now sitting at the table involved in all aspects of relevant Government policy. As a result carers have benefitted from direct financial support measures as well as the stimulus packages.

We all know that this is only one element of support for carers. The Australian Government's Inquiry into Better Support for Carers produced a voluminous report "Who Cares" with 50 recommendations providing a work plan for the next 4 to 5 years. Of the 1200 submissions to the inquiry, more than 600 came from Victoria and we thank all those who contributed including many of our members. Your stories and experiences have provided a rich tapestry for this report.

Our own submission to the Federal Inquiry proposed a way forward to make caring a more commonplace, manageable thing to do, one which doesn't leave you worn out, financially disadvantaged and isolated. This work was guided by the "Next Chapter", which outlines our strategic directions 2008-2012, with its emphasis on improving the health, wellbeing, resilience and financial security of carers as well as promoting increased recognition of caring as a shared responsibility of family, community, business and government.

Our work will continue to be guided by our vision for a sustainable future for caring.

While Carers Victoria has played a role in the increased profile of caring, it is also a reflection of the contribution of our partners in the National Network of Carer Associations and other relevant peak bodies as well as from individual carers. Our role has been to prepare formal submissions, provide briefings, facilitate and support carer involvement and continue advocacy at different Government levels.

The direction for our Association comes from the Board which has responsibility for good governance – ensuring not only that the Association remains true to its purpose but also meets its financial and legal responsibilities as well as supporting management in the discharge of its operational obligations. As our Association has grown, the demands on our Board have become significantly more complex requiring a high level of skills and attributes. My thanks go to the members of the Board who have risen magnificently to the challenge in the past year.

Consistent with our governance duties we have been working to update the Rules of our Association to reflect the changes which have occurred in both the size and scope of our organisation and its activities. We plan to consult with our members on these changes before submitting a proposal for adoption.

On behalf of the board, management and staff of Carers Victoria, I would like to thank our members for their continued support and encouragement.



Ben Chodziesner
President



Ben Chodziesner (President)
Board member since 1997.
Committee member: Business Management; Remuneration; Board Development; Audit and Risk; Strategic Directions.
Former carer; Former President Carers Australia.

CEO'S MESSAGE



"THE POWERFUL VIEWS AND EXPERIENCES OF CARERS ARE INCORPORATED INTO OUR COMMUNICATIONS WITH POLICY MAKERS AND GOVERNMENT – AND ADD STRENGTH AND CONVICTION TO OUR WORK".

The past 12 months could be summarized as "listening to and responding to carers". Some particular things come to mind.

Throughout the year, Carers Victoria has held many events: providing opportunities for carers to meet, share stories and enjoy a well-earned break from their caring responsibilities. As always, the stories about the day to day experiences of carers are brought back to the team at Carers Victoria to influence all of our work.

The leadership, conviction and peer support of the young carers who attended the "Bring It" young carers forum in Canberra inspired all in attendance and in particular the staff at Carers Victoria who returned with a strong determination to make a difference to families where someone has care needs and young people have caring responsibilities.

During this year we have increased the opportunities for carers to have their say. We have surveyed our members about our Board, our work, and our individual programs and services, and we have invited members to participate in research, focus groups and consultations.

Our Speakers Bank continues to engage with communities, government and media to raise awareness of carer issues. Our Victorian Young Carer Action Team (VYCAT) continues to advise, inform and shape policy and practice for young carers.

And finally, many carer members send letters, emails and contributions to our newsletter telling us about their personal experience of caring and what would

make the lives of caring families easier. Carers have spoken out about their needs and they have told us what they want.

The challenge for Carers Victoria is to ensure that our representation work, and the design and delivery of our carer programs and services accurately reflect the wishes, desires and needs of carers in Victoria.

Throughout this report we highlight the work and key achievements for the year that are informed by carers' stories, feedback and communication. The powerful views and experiences of carers are incorporated into our communications with policy makers and government – and add strength and conviction to our work. Carer consultation and feedback informs our service development and enhances our modelling of carer friendly practice.

We are proud of our achievements which have been inspired and guided by the strength of carers' voices.

It is energizing and fulfilling to lead this dynamic partnership between an active committed membership and the dedicated team of staff and volunteers at Carers Victoria. I look forward to new and greater opportunities for carer engagement, and to continuing our work as we respond to the needs and wishes of caring families.

Maria Bohan

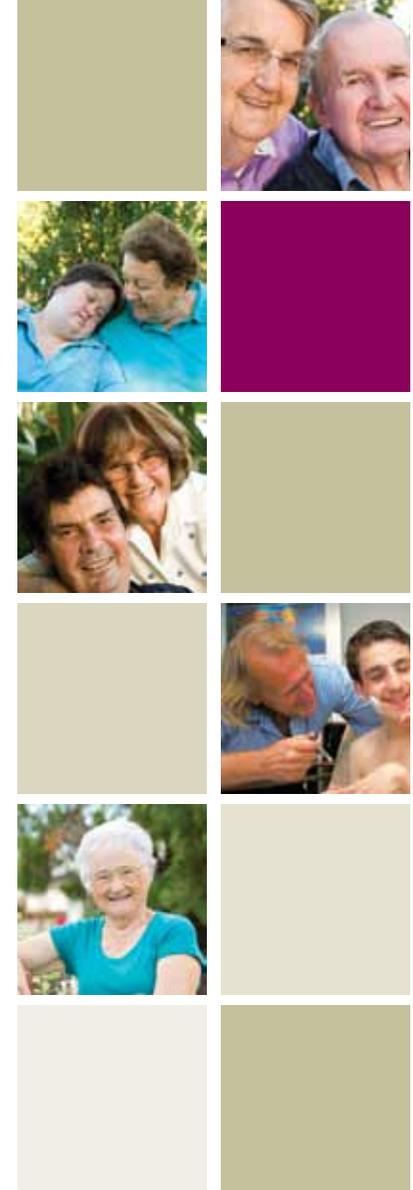
Maria Bohan
CEO

YEAR IN BRIEF

- Policy Team made a total of 16 major submissions and presented at four major government inquiries (at both Commonwealth and State level). We participated in 12 reference or advisory groups; seven working groups with partner organisations and reference groups; and provided advice and support to 14 organisations or post graduate students who were engaged in research or carer consultation projects.
- The freecall Carer Advisory Line provides a first point of contact to carers across Victoria. This year the line has responded to calls from more than 4,708 carers and 1,186 service providers and others, providing 88,870 information items and 143 guided referrals to other relevant services.
- The Carer Counselling Program provides individual and family counselling to carers by professionals within their local area. This year 1,388 carers were assessed, and 3,468 one-to-one counselling sessions were provided to 1,258 carers across Victoria.
- The Carer Education Program delivered 516 free workshops to over 9,601 carers, representing a 38% increase in the number of sessions delivered, and a 50% increase in the number of participants. A further 61 workshops (almost double the number of workshops from the previous year) were delivered to a total of 960 professionals and staff within organisations and services.
- Carers Victoria Respite Connections provides information, support and assistance to access respite for carers living in Melbourne's west. This year the service recorded 31,573 contacts with 2,708 carers,

and a total of 1,178 new carers received a service. Of these, 439 were born in a country other than Australia. Staff at Respite Connections coordinated a total of 25,987 hours of in-home respite and 130,550 hours of residential respite.

- A 35% increase in membership was recorded – with membership at 5209 at the end of this reporting period, reflecting the success of internal and external promotional activities.
- Our fundraising efforts raised \$149,729, with 98% of the funds going directly to programs and services for carers in Victoria. A further \$193,100 was received in pro bono support.
- 1,037 library items were borrowed by 160 library users (98 new borrowers were registered) and 784 reference queries were answered.
- The quarterly newsletter 'Carers in Victoria' continues to inform members and supporters; with circulation growing to 9,000 per issue. The Carers Victoria 'eBulletin' allows us to communicate more frequently with our supporters and provides greater opportunities for carer engagement. In 2008-2009, over 35,000 eBulletins were distributed – a 300% increase from the previous year and evidence of our increased commitment to online communications.
- Carers Victoria contributed to the Department of Human Services Victorian Bushfire Case Management Service. Two staff members from Respite Connections were released (and their positions backfilled) to work for six months providing case management to families affected by the Black Saturday Bushfires.



WHAT CARERS WANT

Show me the money!

Financial support and security for carers



The contribution of family carers in Australia has been valued at over \$30 billion per annum. Despite this, many carers are under serious financial stress. Many carers who have difficulties meeting the everyday costs of living face further strain through the increased costs of caring: aids & equipment, home modifications, higher utility costs, medicines and therapies. Many carers struggle with combining paid employment with their care responsibilities; and some are forced to abandon the workforce - and the opportunity to accumulate superannuation.

This year, a mere 10% of carers who were assessed for access to the Carer Counselling Program were in full-time employment – and of the general calls assisted by the Carer Advisory Line financial issues were frequently cited among the reasons for presenting. It is clear from listening to carers that they are doing it tough – and they need more than quick fix solutions.

To arrive at sustainable solutions carers need improved income support and taxation policies to reduce financial hardship. We need policies that allow and promote flexible work to encourage carers to participate in paid work. Where caring responsibilities

prevent workforce participation we need to ensure those who care have proper financial security for their future.

Carers Victoria, led by the Policy Team, has worked long and hard to address these issues.

After four years of intense work this year we saw a broadening of eligibility for Carer Payment (child). As a consequence of submissions by the Network of Carer Associations, the work of the Task Force on Carer Payment (child), FaHCSIA, and the Senate Community Affairs subcommittee, improved benefits will include a broadening of eligibility to include more care situations, a modified eligibility assessment process, recognition of care load and the needs of people with multiple care responsibilities, and a streamlining of eligibility for Carer Payment (child) with Carer Allowance. Implementation of reforms will commence in July 2009, and outcomes will be closely monitored.

We also worked with Carers Australia on a submission to the Pensions Review, which successfully advocated increases in base pension rate. It also advocated for: improving the option for carers to participate in paid work through reducing current disincentives such as the 25 hour rule and the impact of Effective Marginal

Tax rates; for allowances for the costs of caring and the costs of disability; and government sponsored superannuation for carers shut out of the workforce. We eagerly await the release of the Taxation Review report in December 2009.

In addition, considerable lobbying by carers, Carer Associations and other groups resulted in the following: a legislated base for carer bonus payments; modifications to the continence support payment with the introduction of the capacity to purchase continence products from a range of providers; and improvements to Special Disability Trusts (still in process).

Our continuing work with Centrelink provides Carers Victoria with opportunities to address operational issues that many carers experience when dealing with that service. Centrelink managers provide Carers Victoria with up to date information about changes in entitlements and how these may affect carers. Carers Victoria has been able to resolve a number of issues for carers by raising them directly at these meetings; and Centrelink officers make themselves available for direct contact and consultation by Carers Victoria about individual carers' issues.

Recent studies have shown that many carers want to work but the lack of workplace flexibility, combined with a shortage of alternative care arrangements, are considerable barriers. Reform of workforce policies and practices, and reform of the service system are required so that caring is compatible with paid work.

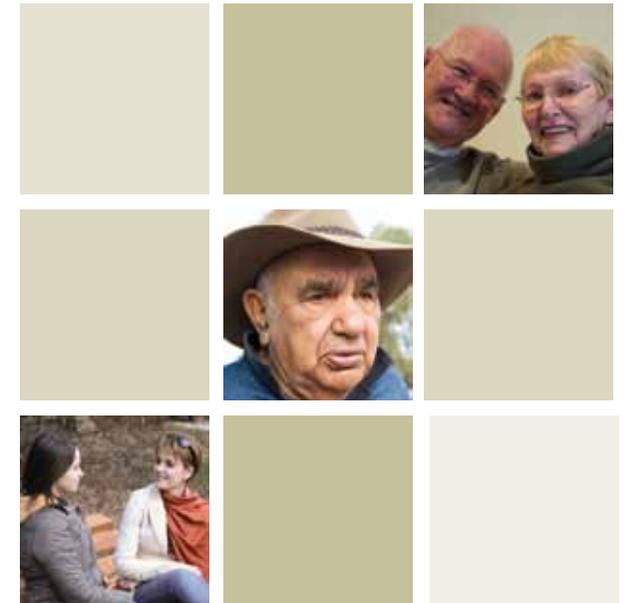
To address this, Carers Victoria has strongly advocated for carers on the issue of work and care. Outcomes include:

- Supporting changes to the Victorian Equal Opportunity (Family Responsibility) Act (2008), and the development and promotion of the "Family Responsibility Guidelines for Employers and Employees" which protect working parents and carers from discrimination;
- Contributing to national debate about the Commonwealth Fair Work legislation to ensure the right to request flexible work was extended from families with young children to families of children with a disability up to 18;
- The introduction of funding to support the development of a small number of Outside School Hours Care Programs for adolescents with a disability in Victoria;
- The completion of Ways to Work, a scoping study of the needs and experiences of parents of adults with a lifelong disability in participating in paid work;
- Extending the guidelines of the national Fresh Ideas for Work and Family Grants Program for small business to include workers involved in the care of family members who have a disability or frailty;
- Access for carers to the Back to Work Grants Program of the Victorian Department of Innovation, Industry and Regional Development.

This program will be rolled out through Community Colleges Victoria between September 09 and December 2010.

- The completion and evaluation of our pilot Employed Carers Project in partnership with Australia Post and Baptcare. This project identified and supported carers of older people in the workplace, with a particular focus on the needs of CALD families;
- The Carers@Work Program has funded respite opportunities for over 50 working carers living in Melbourne's west. In turn, care recipients have had the opportunity to socialise as part of a group in the safety of a day centre setting or benefited from one to one time with an in home respite worker. We have received positive feedback from working carers who have, with support from the program, gradually moved away from using their own sick leave and annual leave days to fulfill the demands of their caring role. The program has aimed to build the confidence of working carers in the respite services available to them.

"NO OTHER PENSIONERS ARE ASKED TO WORK FULL TIME! A SALARY COMMENSURATE WITH OUR COMMITMENT, HOURS, ETC. PLUS HOLIDAYS AND SUPERANNUATION MIGHT BE A START."



WHAT CARERS WANT

Caring makes me sick!

Improved health and wellbeing for carers

“CARERS DO WEAR OUT. I AM CLOSE TO THAT NOW – NOT PHYSICALLY, BUT THE MENTAL PRESSURE IS BECOMING ALMOST UNBEARABLE.”



While there is no doubt that caring brings many joys and rewards, this often comes at the expense of one's health and wellbeing. Studies have shown that carers are more likely to be in poor physical condition than the general population, and are more likely to suffer from a chronic condition or depression. This year, the Respite Connections Disability Program has reported an increase in the number of carers who have been hospitalised due to ill health.

Carers Victoria responds to the needs of carers through a range of carer specific programs and services.

The Carer Advisory Line provides a first point of contact to carers across Victoria, connecting callers to a range of services including: information and referral; support and counselling; carer education; and local services as appropriate. The Carer Advisory Line assesses and refers carers to professional counselling support through the Carer Counselling Program. This program provides episodes of six sessions of professional counselling within their local area.

Our Carer Education Program continues to focus on health and wellbeing, with “Caring for Yourself”, “Surviving Carer Stress” and “Humour and Caring” among the most frequently requested carer workshops.

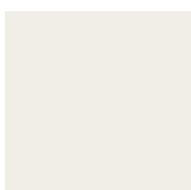
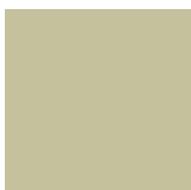
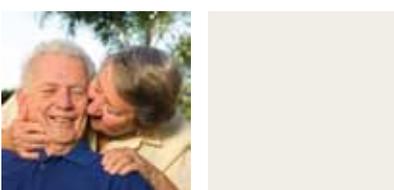
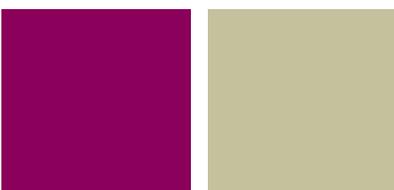
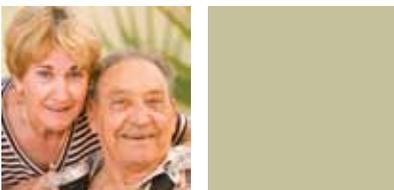
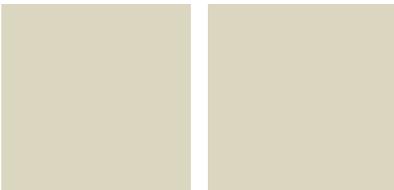
These programs have contributed to positive outcomes for carers through supporting them to manage and balance their caring role with their own health and wellbeing. These outcomes are evidenced by consistently positive feedback received directly from carers at the conclusion of their counselling sessions and carer workshops.

In November 2008, a delegation of nine staff attended the National Carers Conference in Queensland to present on three innovative programs: “Newly Arrived Program”, “Power on for Carers (mental health)”

and “Transitions into Residential Care”. At the 2008 Victorian Carer Services Network Best Practice Forum, eight of the 16 presentations were delivered by Carers Victoria staff; confirmation of the innovation and quality of our programs.

Throughout the year, Respite Connections programs have continued to model new, flexible and creative forms of carer support for families living in Melbourne's west, including:

- A trial of the “Community Recreation Program” a model which supports groups of carers who live locally to obtain respite from their caring role by linking into existing local community activities;
- In recognition that caring for an elderly relative is often a responsibility shared by couples, a carer retreat was held for couples under 65 years. This model of support was very successful as it acknowledged that this group of carers are typically more active than older (spousal) carers;
- Art and Music therapy programs have been expanded with the Mental Health Program's “Carer Art Lounge”. This eight week program offered respite and art classes for the purpose of relaxation and creativity;
- Older Families Support and Planning Program, collaborated with the Carer Education Program to develop a series of ‘Planning for the Future’ workshops for older carers; combining information and assistance with succession planning;
- Increased brokerage has been spent on high level day respite within Aged Care Facilities. Ten facilities within the western metropolitan region are now offering this type of respite – despite the absence of government funding;
- Recent funding rounds have provided the opportunity to consider optimum service delivery



models. For example, Dementia Carer Training and Education Grants have prompted the Respite Connection Aged Program to develop an innovative model of carer support that includes carer home safety assessments, support with altered behaviours, and recreation and leisure assessments.

In addition to this, the Residential Respite Program continues to promote the benefits of regular respite to carers of the aged. During the reporting period, 39 aged care facilities in Melbourne’s west offered regular residential respite, with 36 of these listed on Vacancy Seeker, an initiative of the Victorian Carer Services Network. The high level of listing reflects the ongoing efforts by our aged program staff to promote the site, and to educate providers about its use and benefits.

It is clear that respite can provide the break that carers need to recharge their batteries, and maintain their health and wellbeing. The Respite Connections 2009 Carer Satisfaction survey showed that of service users surveyed, 91% indicated they felt better after talking to a professional staff member and 92% of carers indicated that respite or practical support made a difference to them or made their job easier.

But what about the hidden carers in the community? Our programs and services are only effective if carers can access them – and we know that many family carers are unaware of services and supports available. Carers Victoria has worked to reach these hidden carers and promotion of our services is fundamental to this work:

- The “About us – Carer Services” workshop accounted for almost 20% of all workshops booked and were delivered to organisations who were previously unaware or unfamiliar with Carers Victoria. In addition, new promotional products were developed and distributed through

Centrelink and Royal District Nursing Service. The end of the financial year also saw the development of targeted brochures and posters for distribution at General Practice waiting rooms and medical centres.

- Our Speakers Bank program continues to support our work to raise awareness of carers and carers’ issues. This year, highlights include participation in: the public hearing of the Federal Inquiry for Better Support for Carers; a focus group to comment on the Department of Human Services Carers Charter; and several media interviews relating to the Carer Inquiry, Carers Week, and the Federal Budget.
- An awareness campaign targeting metropolitan commuters promoted our Carers Week message via two 9-metre banners at Flinders Street Station, displayed for a two week period to an estimated daily audience of 100,000 commuters. A further 200 posters were displayed at stations across the metropolitan railway network, and five daily advertisements were placed in the popular MX newspaper, distributed to around 90,000 commuters daily.
- Seven young carers from across Victoria participated in a Carers Week photographic project which culminated in “Pictures of Young Carers”: a digital exhibition displayed in the projection space at the City Library raising awareness of young carers in the heart of the city;
- Market research commissioned by Carers Victoria and conducted by Quantum Market Research has measured the level of awareness of our organisation, and tested community perceptions about carers and caring. The results provide an opportunity for benchmarking and will inform future marketing and promotion activities.

WHAT CARERS WANT

My place in society!

Social inclusion for carers



Lower income, fewer opportunities for workforce participation, and reduced health and well-being are a recipe for social exclusion. Family carers tell us that caring reduces their access to social activities; many are isolated, with limited means and opportunities to fully participate in the community.

Our carer events continue to be popular among carers: enabling opportunities for respite, social interaction, and peer support:

- Nine Mingle events were held for members (four in August 2008, and five in May 2009). These events were held in Geelong, Bendigo, Ballarat, Traralgon and Melbourne and a total of 702 carers attended. Some members travelled from much further afield: Warrnambool, Colac, Natimuck, Horsham, Stawell, Swan Hill, Bairnsdale, Cowes and many places in between;
- During Carers Week in October, 203 Carer Support Groups participated in activities funded by Carers Victoria. A total of \$31,066.50 was distributed to groups with an estimated 4,265 carers participating in a range of activities from quiet group lunches to mystery bus tours and river cruises. A further \$16,000 was provided

to support Carers Week events held by the Commonwealth Carer Respite and Carelink Centres in the metropolitan region. Over 800 carers participated in these events;

- Carer retreats continue to provide opportunities for carers to meet with others, with overnight stays (and subsequent reunions) allowing adequate time and opportunity to develop lasting friendships.

A particular focus for 2008/2009 has been our work with culturally and linguistically diverse (CALD) communities, where lack of identification as a carer, and lack of information about supports can result in higher risk of social exclusion. Some of our work includes:

- In partnership with Alzheimers Australia Victoria, the delivery of "Songs from Life", a music workshop for Greek speaking carers of people with dementia;
- The "Newly Arrived Program": liaison, networking and partnerships with a range of community groups from the Horn of Africa and the Burmese communities where complex issues around the self-identification of caring families combined

with a mistrust of government services create additional barriers for carers needing supports;

- The Carer Education Program presented 45 workshops and has worked collaboratively with a number of organisations and services to identify, recognise and support carers in CALD communities;
- Using best practice principles, information flyers promoting Respite Connections services were translated into 14 community languages to better promote our services in the diverse communities of the western metropolitan region.

Young carers are another focus for our work, with studies showing that young people with caring responsibilities are likely to experience social, educational and economic disadvantage. Our program highlights this year include:

- Young Carer Scholarships were distributed to 106 young carers from all regions in Victoria – double the number of recipients from the previous year. The WCF Thomas Charitable Trust has made a commitment to support the scholarship program with \$30,000 per year until 2011. The Rotary

Club of Mt Eliza and Portland House continue as key supporters of the program. This year we also welcomed the additional support from the Lord Mayor's Charitable Trust bringing the total value of scholarships awarded to \$67,967. Recipients received awards of up to \$700 to assist with direct education expenses, extra curricular school activities or recreational activities.

- The Respite Connections Young Carer Program continues to provide supports for young people at risk of leaving school and this year has responded to increased demand for the "Young Carer Tutoring Program". This year the program has also responded to an increase in referrals from the newly arrived communities of Sudan, Ethiopia, and Iraq by creating opportunities for young people from these communities to meet other young people who have caring responsibilities and to participate in recreational activities that are new to them. A young carer reference group has been established to engage with young people about the services delivered by the program, and will allow opportunities for participants to build skills and provide input on program improvements;
- The Paying Attention to Self (PATS) program was offered for the first time in the western region for young people who have a parent with a mental illness. This will be an ongoing program, as will the monthly group activities and excursions for young carers to meet regularly and develop friendships;
- The statewide young carer program continues its work with the Department of Education and Early Childhood, Catholic Education Office, Association of Independent Schools Victoria and the Australian Catholic University to highlight the impacts and needs of our young carers at school; and continues to successfully link young carers

with community volunteers through the Mentoring Program;

- The national young carer forum "Bring It" was held in Canberra in November with a Victorian delegation of four young carers and six Carers Victoria staff who participated in two days of meetings and discussion panels. Held at Parliament, and opened by The Hon Jenny Macklin and The Hon Bill Shorten, the forum concluded with recommendations for four key areas: access to government services, identification, respite and education.

Another highlight of work has been our input towards the Victorian Carer Card for recipients of Carer Payment or Carer Allowance, or carers who have been endorsed as eligible by a General Practitioner or Allied Health professional. Benefits will include discounts on a range of government and community venues, activities and services, and free travel on public transport on Sundays. Carers Victoria will continue to work closely with the Victorian Department of Human Services to define eligibility and to advise on implementation and promotion.

It is important to also highlight our work which focuses on housing and accommodation. This year, Carers Victoria, led by the Policy Team, has:

- Prepared a submission to the Family and Community Development Committee, Victorian Parliament for the Inquiry into Supported Accommodation for Victorians with a Disability or Mental Illness. We also presented at a hearing of the committee arguing strongly for improved investment by the Victorian Government into housing and support options which are desperately needed by carers. The committee is due to report in December;

- Commenced strong advocacy on the need for a disability and mental health housing strategy which includes better targeting of housing resources for our most vulnerable groups;
- Liaised with the Department of Human Services concerning the development of 100 Shared Supported Housing Services for ageing parent carers, an outcome of years of lobbying;
- Lobbied that the Victorian Mental Health Reform Strategy included high priority investment into Prevention and Recovery Care, and high intensity Home Based Outreach Support for people with a mental illness.

"AS A CARER OF 30 YEARS, I FIND NOW, AT THE AGE OF 64, I AM ISOLATED. I CANNOT PARTICIPATE IN THE WIDER COMMUNITY – OR ESTABLISH FRIENDSHIPS THAT WOULD CONTINUE WHEN INEVITABLY MY SON GOES INTO HIS OWN HOME.."



TREASURER'S REPORT



Despite a year when Victoria was battered by bushfires and the global financial crisis, our turnover increased by some 5%. This increase reflects the higher profile of caring and caring issues in the wider community.

Our prudent policy of holding our assets in cash and cash equivalents ensured that our business was not impacted by the dramatic fall in markets that affected many other businesses. This prudent policy will ensure the continued sustainability of our business.

Carers Victoria continues to demonstrate a sound balance sheet with current assets exceeding current liabilities at balance date by a ratio of 1.58 to 1 (a slight increase on last year). Our gift fund grew by more than 50% through donations and other fund-raising activities.

As foreshadowed last year, this year we drew down on the reserves that we had set aside in previous years to enable us to continue to increase our services. This increase is reflected in the 20% increase in staff costs

(our largest expense) and the 12% increase in other expenses for the twelve months to 30 June 2009. Our staff numbers have also grown in this period. After drawing down on reserves, the accumulated surplus of \$22,445 was a small reduction on the previous year.

The diversification of funding sources remains a key financial objective to sustain many important activities which are not directly funded such as policy development, advocacy, and contribution to the National Network of Carers Associations.

A handwritten signature in black ink, appearing to read 'Trevor Aronson', written over a white background.

Trevor Aronson
Treasurer

AUDITOR: KPMG ASSURANCE AND ADVISORY

**INCOME STATEMENT
YEAR ENDED 30 JUNE 2009**

	2009 \$	2008 \$
Income		
Grant Income	9,158,414	8,710,386
Income Generation	311,161	289,995
Other Income	101,222	121,669
	<u>9,570,797</u>	<u>9,122,050</u>
Expenses		
Salaries, Wages and Oncosts	5,396,168	4,496,229
Carer Discretionary Expenditure	2,352,354	2,055,625
Other Expenditure	1,988,677	1,804,744
	<u>9,737,199</u>	<u>8,356,598</u>
Net Operating Result for the year	<u>(166,402)</u>	<u>765,452</u>

**STATEMENT OF APPROPRIATIONS
YEAR ENDED 30 JUNE 2009**

	2009 \$	2008 \$
Net Operating Result for the year	(166,402)	765,452
Accumulated Surplus at the beginning of the financial year	<u>43,407</u>	<u>32,398</u>
Surplus available for appropriation	<u>(122,995)</u>	<u>797,850</u>
Fixed Assets Reserve Allocations		
Equipment Purchases	(71,599)	(57,906)
Equipment Disposals	18,465	6,720
Depreciation	101,011	121,685
	<u>47,877</u>	<u>70,499</u>
Other Reserve Allocations		
Specific Purpose Reserve	97,563	(754,942)
Equipment Replacement Reserve	-	(70,000)
	<u>97,563</u>	<u>(824,942)</u>
Accumulated Surpluses at the end of the financial year	<u>22,445</u>	<u>43,407</u>

**BALANCE SHEET
AS AT 30 JUNE 2009**

	2009 \$	2008 \$
Members' Funds		
Accumulated Surpluses	22,445	43,407
Total Reserves	<u>1,531,821</u>	<u>1,677,261</u>
	<u>1,554,266</u>	<u>1,720,668</u>
Represented by:		
Current Assets		
Cash at Bank and On Hand	3,808,369	3,774,645
Sundry Debtors and Grants Receivable	90,626	634,674
Prepaid Expenses	25,501	30,912
Shareholdings	5	5
	<u>3,924,501</u>	<u>4,440,236</u>
Non-Current Assets		
Fixed Assets at written down value	<u>201,785</u>	<u>249,663</u>
Total Assets	<u>4,126,286</u>	<u>4,689,899</u>
Current Liabilities		
Sundry Creditors and Accruals	1,145,702	1,001,948
Staff Leave Provisions	512,085	466,206
Grants Received in Advance	680,659	1,310,359
Gift Fund	148,293	97,424
	<u>2,486,739</u>	<u>2,875,937</u>
Non-Current Liabilities		
Staff Leave Provisions	<u>85,281</u>	<u>93,294</u>
Total Liabilities	<u>2,572,020</u>	<u>2,969,231</u>
Net Assets	<u>1,554,266</u>	<u>1,720,668</u>

ACKNOWLEDGEMENTS

Caring is a shared community responsibility



Even in these challenging times, with global financial insecurity and numerous environmental disasters, Carers Victoria is privileged to maintain (and grow) our network of supporters, partners and friends, who add incredible value and much needed resources to our work.

But more importantly, our supporters are proof of our vision – communities taking action to ensure that caring is recognised, supported and shared.

For their ongoing commitment to a sustainable future for caring, we express our heartfelt thanks to the following:

- Our members - for their input into, and continued support for our work. This year we registered 1,826 new members and 72% of our members have opted in to support research.
- Blake Dawson - for \$87,200 in pro bono legal services in the areas of intellectual property, copyright, contract law, corporate law and litigation; for assistance in reviewing our constitution, our contracts and service agreements with government; and for preparing a memorandum of understanding for the National Network of Carers Associations.
- KPMG - a long-time pro bono supporter, for continued support in an auditing capacity. This year KPMG also took on the role of Returning Officer for our first contested election at the AGM. Their contribution is valued at \$35,000.
- Freehills - for sponsoring our AGM. Their in-kind contribution of \$4,000 provided us with a venue and catering that was beyond what we could otherwise have offered our members.
- Sparke Helmore Lawyers - for pro bono legal support in the area of copyright and intellectual property regarding our “Surviving the Maze” series of information sheets.
- Tobin Brothers - a long-time supporter of Carers Victoria, who this year provided pro bono printing services to the value of \$1,000.
- Rotary Club of Mt Eliza - who have taken a lead role in promoting the Young Carer Scholarship Program within Rotary networks, at conferences and within the local community. In November, they held the fifth Rotary Young Carers Race Day to raise vital funds, contributing \$14,000. Their collaborative approach has enabled us to jointly secure additional funds (\$30,000 per year for three years) from the W.C.F. Thomas Charitable Trust, to help build and expand the program.
- Lord Mayor’s Charitable Foundation - which contributed \$10,000 to the W.C.F. Thomas / Rotary Young Carer Scholarship Program, enabling us to provide an additional 14 scholarships.
- Portland House Foundation - their significant annual contributions have totalled \$50,000 to support the development of our Young Carer Scholarship Program, as well as peer support and mentoring for young carers.
- Connex - for in-kind sponsorship of Carers Week to the value of \$38,000. Other Carers Week support included Andrew Firn The Good Guys which donated nine digital cameras as prizes for our Young Carer Photographic Exhibition.
- Australian Unity - continued its strong support for carers and Carers Victoria by partnering with us to deliver five Mingle events across Victoria in May. Their in-kind support was valued at \$15,000, involved 30 of their staff, and the provision of transportation assistance for staff and members.
- Quantum Market Research - for their generous pro-bono support, as we embarked on our first piece of marketing research.
- V.V. Marshman Charitable Trust - for their continued support and generous donation of \$13,650 for phase 2 of the “Promoting Sustainable Caring” workshops. Their contribution enabled the delivery of 33 workshops in the Grampians region and 27 workshops in the Barwon South West region.

- Greatconnections - for mentoring of our Executive Team, and support to enhance organisational reporting.
- Roland Rocchiccioli - for generous support of our 2009 Mingle events. As guest speaker, Roland gave a truthful but humorous account of the time he spent caring for his mother Beria.
- Helen Garner - for donating her time and sharing stories of her caring experience as guest speaker at our Annual General Meeting.
- Sue Oakley of Susan Oakley and Associates, for offering her fundraising and communications knowledge and expertise pro bono.
- Marie and Neil Lloyd - for donating short breaks for carers at their self-contained accommodation, Tessenna Villa. Provided as a member prize in our quarterly newsletter, the respite was highly valued by the carers who won.
- Judy Jacques and True Blue Decorative Artists - who for the third consecutive year, have donated a Christmas tree and hand-painted decorations, for use as a fundraiser.
- CG Publicity & Musica Viva - for the generous donation of movie and concert tickets for members.
- Peter Clark, Cynthia Mayne, Danielle Hitch, and Natural Beauty Care Pty Ltd for in-kind donations.
- Patricia Cameron-Hill and Shayne Yates for their humorous contributions to the newsletter.
- Our volunteers - our thanks to the following for their generosity, commitment and support: Daria Barbiak, Prue Bretherton, Joan Cannizzaro, Betty Clayton, Theresa De Gabriele, Veronica Hassing, Anna Healey, Rick Massese, Zelma Riddell, George Rozensteins, and all the members of our Speakers Bank.
- Our staff - our work is made possible through the commitment and dedication of our staff. We give our thanks for their outstanding effort and contributions to caring families in Victoria.

And finally, our thanks to all our community partners:

Action on Disabilities in Ethnic Communities • ACTU • Aids & Equipment Alliance • ALSO Foundation • Alzheimer's Australia Victoria • annecto • Arthritis Victoria • Association for Children with a Disability • Association of Independent Schools Victoria • Australian Catholic University • Autism Victoria • Baptcare • Bendigo Health Care Group • BrainLink • Breacan • Brotherhood of St Laurence • Cancer Council Victoria • Canteen • Care with Quality • Carers Australia, and the National Network of Carers Associations • Carers Network (Carers of people with a mental illness) • Catholic Education Office • Centre for Cultural Diversity in Ageing • Chronic Illness Alliance • Coalition for Disability Rights • COASIT • COTA Victoria • Deakin University • Department of Education and Early Childhood Development • Diabetes Australia Vic • Down Syndrome Victoria • Epilepsy Foundation • Ethnic Communities Council of Victoria • Forensicare • General Practice Victoria • Greek Welfare • Headway • Heart Foundation • Huntington's Victoria • Industrial Relations Victoria • Inspire • Kidney Health Australia • Leadership Victoria • Leukaemia Foundation • Mercy Health and Aged Care • Mesothelioma Foundation • Migrant Resource Centres • MND Victoria • MS Australia • Myeloma Foundation • National Disability Services • Our Community • Ovarian Foundation • Palliative Care Victoria • Parkinson's Victoria • Prostate Foundation • Royal District Nursing Service • Scope • St Vincent's Health • Stroke Association Victoria • Uniting Care Aged Care Network • Uniting Care Community Options • URCOT • VCOSS • Veteran Affairs Network • Veterans and Veterans' Families Counselling Service • Victorian Aboriginal Health Service • Victorian Carer Services Network • Victorian Electoral Commission • Victorian Equal Opportunity and Human Rights Commission • Vietnam Women's Association • Vision Australia • Western Suburbs Indigenous Gathering Place • Yooralla



WE RESPECTFULLY ACKNOWLEDGE THAT THE WESTERN METROPOLITAN REGION (WHERE CARERS VICTORIA'S OFFICE IS LOCATED) IS ON COUNTRY WHERE THE KULIN NATION PEOPLE AND THEIR ANCESTORS HAVE BEEN CUSTODIANS FOR THOUSANDS OF YEARS. WE ACKNOWLEDGE AND PAY OUR RESPECTS TO THE KULIN NATION PEOPLE, TO THEIR ANCESTRAL SPIRITS AND TO ELDERS PAST AND PRESENT.



ABOUT US

Carers Association Victoria Inc (Carers Victoria) is incorporated under the Associations Incorporation Act.

Incorporation Number: A0026274M

ABN 12533636427

Carers Victoria receives funding from the Victorian Department of Human Services, and the Australian Departments of Health and Ageing; Families, Housing, Community Services and Indigenous Affairs; and Veterans Affairs.

SUPPORT US

We are grateful for the generosity of individuals, trusts and foundations, businesses and corporations who value and support our work with family carers.

For caring to be recognised as a shared community responsibility of family, community, business and government - much work needs to be done.

If you would like to find out more about how you can get involved in our work, please contact us.

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