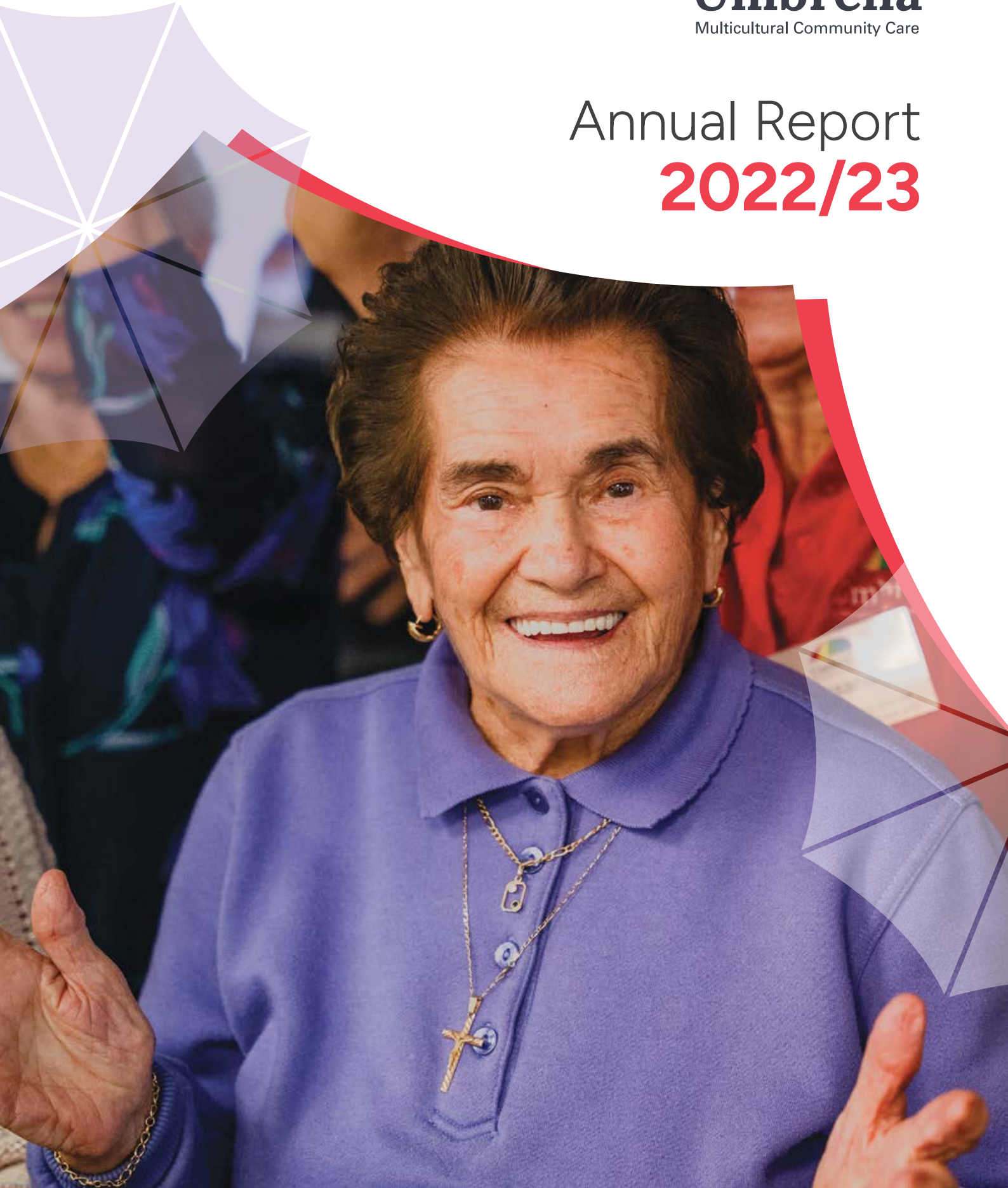




# Annual Report **2022/23**





# Kaya!

Hello Aloha Ahoj 你好  
Salve

Kia ora HOLA Γειά σου  
Dia dhuit

Guten Tag Ůdv Bonjour

Namaste Dzień Dobry

Olà Selamat Siang Sveiki

Zdravo Xin chào Привіт

مرحبا Shalom Salut

Merhaba こんにちは

ЗДРАВСТВУЙТЕ

Ciao

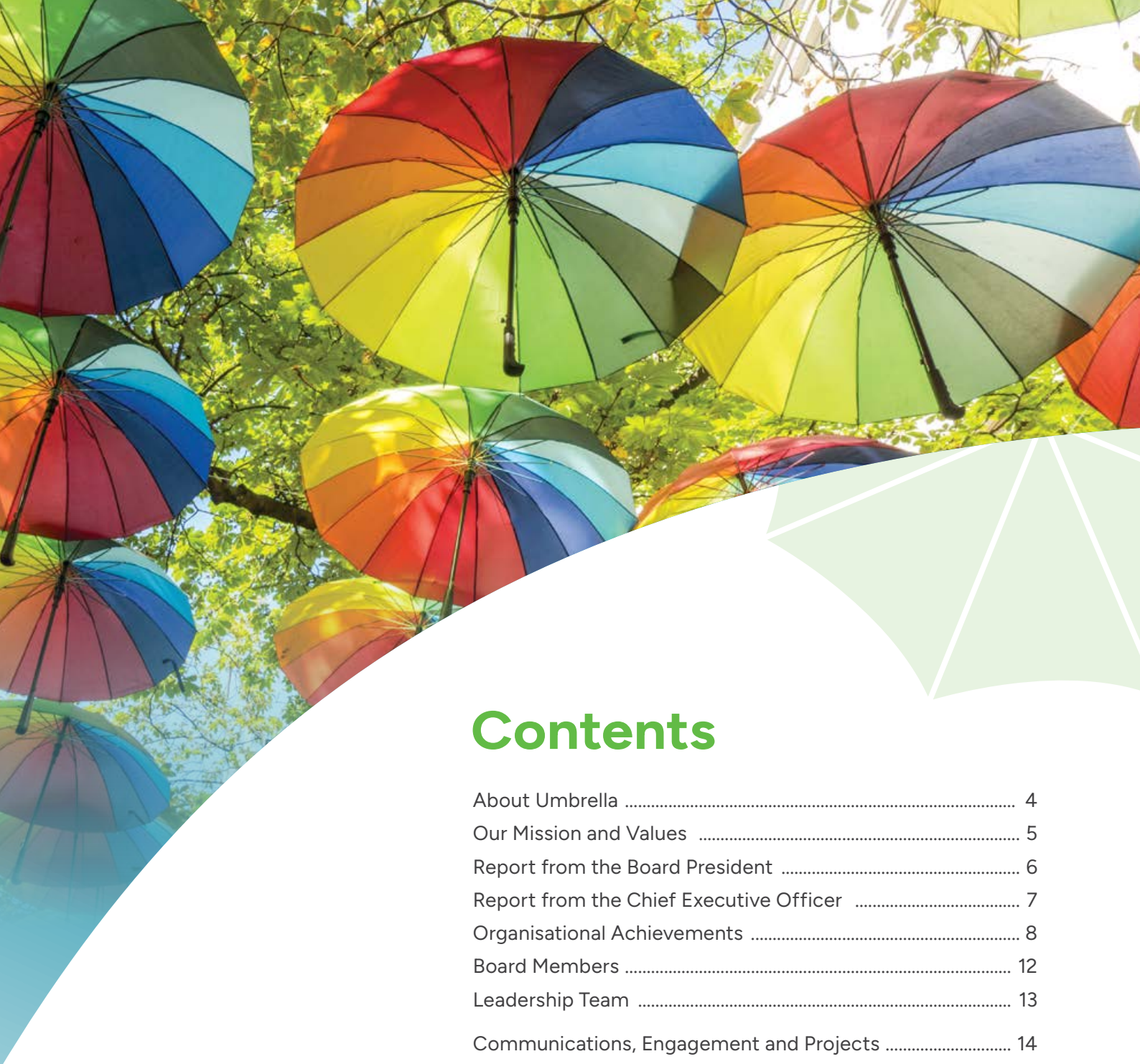
## Acknowledgment

We acknowledge the Noongar nation and the Whadjuk people as the traditional custodians of the land on which our services are based. We pay our respects to their elders past, present and emerging.

We acknowledge the LGBTIQ+ elders and we express our gratitude for the recognition and acceptance that the LGBTIQ+ community receives today.

We also acknowledge the elders of the multicultural, multilingual and multifaith communities who serve as the inspiration for our mission and values. As we stand on their shoulders today, we celebrate diversity and continue to promote respect and inclusion for all.





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## About **Umbrella**

Australia is one of the most culturally diverse nations in the world and migrant communities are ageing at a significantly faster rate than the general population. According to the most recent census, over 30% of the Australian population aged 65 years and over are from Culturally and Linguistically Diverse (CaLD) backgrounds.

Despite this, people from CaLD backgrounds remain under-represented in aged care services and struggle to find providers that are responsive to their needs.

This need gave rise to Umbrella Multicultural Community Care Services Inc. being created in 2000 and today Umbrella is a leading not-for-profit organisation with 167 staff, 80 volunteers and over 1,000 clients from 70 countries.

Umbrella is funded by the Commonwealth Government to deliver home care services to seniors across the Perth metro area and in the Peel region.

Our programs are designed to assist people to live independently in their homes for as long as possible.

Our services are provided by support staff who speak more than 40 different languages and are from migrant backgrounds themselves.

Our multicultural volunteers speak 27 different languages. Clients are matched with carers based on religious, linguistic and cultural compatibility.

We have representatives on national and state advisory groups and we partner with a variety of other organisations to deliver successful programs and projects such as care finder, home support services, social support services, Carer Gateway and the Aged Care Volunteer Visitors Scheme.

We also run one of 12 Village Hubs in Australia, funded by the Department of Social Services, providing social support and information to residents of Bayswater and Belmont aged 55 years and over, to help them prepare for retirement and remain socially connected.

Another successful project, funded by the Western Australian Office of Multicultural Interests, is focusing on the gap in support services for LGBTIQ+ migrants arriving in Perth from countries around the world. We are helping to raise awareness of the challenges they face amongst service providers, including government departments, agencies, private companies and other not-for-profit organisations.



Umbrella has serviced thousands of seniors from CaLD communities over the past 23 years and provided advice regarding culturally appropriate care delivery to the Royal Commission into Aged Care Quality and Safety and numerous other research projects around Australia.

We are members of the Aged & Community Care Providers Association (ACCPA), the national association for providers of age services across residential care, home and community care and retirement living.

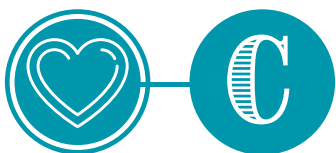
Our innovation in the delivery of high-quality services to seniors from diverse backgrounds has resulted in us receiving several awards such as:

- 2016 ACSWA Excellence in Care Award
- 2016 COTAWA Award
- 2017 HESTA Aged Care Award finalist
- 2018 Excellence in Service Delivery at the Cultural Diversity in Ageing Excellence Awards
- 2019 ACSA Employee of the Year Award
- 2021 ACSA Provider of the Year Award and Employee of the Year Award
- 2022 CaLD Community Organisation Award from the Office of Multicultural Interest
- 2023 Volunteering WA Awards finalist.

## Our Mission

At Umbrella, we believe everyone has an equal right to enjoy their golden years. We believe that language, gender identity, culture or financial status should not be a barrier to accessing quality services. We believe that Umbrella's ethos of respect, passion and commitment to our mission, and our staff's hard work, can change someone's life.

## Our Values



### Compassion

- We are passionate about helping people
- We work in a supportive, caring and culturally appropriate way
- We value our differences, like family



### Accountability

- We do what's right and learn from mistakes
- We take responsibility
- We lead by example



### Respect

- We are open and honest
- We embrace diversity
- We celebrate achievements



### Excellence

- We provide quality and safe services
- We actively seek to improve
- We are dynamic, inclusive and collaborative



## Report from the Board President

The year in review saw changes to our Board as Umbrella prepared itself for the aged care reforms that lie ahead.

The new national accreditation requirements for aged care service providers have required Umbrella to develop new policies and procedures around quality and continuous improvement, workplace health and safety, training and reporting mechanisms.

The strategic role of the Board has become more demanding, and new levels of skills and experience have been called for.

We welcomed new Board members Ann Rial, Beata Larcombe, Helen Elliott and Dr Anna Golab, all of whom have extensive experience in clinical care, social support, community engagement, strategy development, governance and financial management.

Despite the challenges, I am proud that our focus remains on the reason we are volunteer

Board members: to serve our culturally and linguistically diverse seniors who came to Australia for a better future. They need our support to remain connected to their communities and to stay independent and well, for as long as they can.

Social isolation and loneliness are becoming one of the biggest threats to the health of our seniors. We offer them a place to call home, friendly faces and support workers who speak their language.

Thank you to my fellow Board members and to Anna Harrison AM JP for your commitment to Umbrella. I am privileged to serve as your President.

**Marika Krstevska**  
Board President





## Report from the Chief Executive Officer

I would like to thank everyone in our Umbrella family for another wonderful year of challenges met and overcome. Not only did we navigate our way through a changing national aged care landscape, but we also underwent several organisational changes of our own.

Change is nothing new at Umbrella. We would not have survived for the past 23 years and become the biggest multicultural aged care provider in Western Australia if we were afraid to change.

I am so proud of every client, employee and volunteer who has stayed with us on this incredible journey. Some clients have been with us since we began in 2000. Today, we have over 1,000 clients from 70 different cultural backgrounds, 167 staff members and 80 volunteers. Since we began, we have taken care of over 10,000 clients.

Our balance sheet is healthy, thanks to funding from the Department of Health and Aged Care to deliver our home and social support services. However, we are carefully managing our cashflow, as costs are on the increase.

We are also grateful to continue to receive funding from the Department of Social Services, the Department of Communities, the Western Australian Office of Multicultural Interests, and the WA Primary Health Alliance.

I was honoured to be asked by the Board to return as interim CEO to lead our Umbrella family and chart a course forward, until Umbrella is ready to search for a new CEO. I am excited for what lies ahead as we embrace the future of aged care. I am also grateful for the government reforms, which will help ensure that all Australian seniors, regardless of cultural, linguistic and gender identity, have the opportunity to enjoy their golden years.

**Anna Harrison AM JP**  
Chief Executive Officer



### Highest honour in Australia awarded to our founder and CEO

*Congratulations to our CEO Anna Harrison AM JP on her investiture as a Member of the Order of Australia for 2023.*

*Governor of Western Australia, His Excellency the Honourable Christopher Dawson AC APM, invested 107 outstanding West Australians this year.*

*It was the first ever King's Birthday Investiture since the inception of the Order of Australia in 1975. It was also the first time in history that more women than men were invested in Australia.*

*Anna was cited for her significant service to multiculturalism and to aged care.*





*Excursion to the  
Giants of Mandurah*

## Organisational achievements

The 2022/2023 financial year was another successful year for Umbrella, with several continuous improvement initiatives implemented. Here are the organisational highlights of the year in review:

### Financial systems

We continued to improve our financial systems and processes to enhance transparency, cost allocation, reporting and compliance for audit purposes.

We prepared for the rollout of a new payroll system from 1 July 2023, and we completed the implementation of a new client information and rostering software program and application.

This has resulted in a completely paperless client information management system.

The practice of collecting cash payments for home care services ceased in July 2022. All clients were transferred to direct debit to eliminate cash handling practices and EFTPOS machines were introduced for social support group clients in late 2022.

### Quality and safety audit results

After a four-year hiatus, we were notified by the Aged Care Commission of an external audit in September 2022. We achieved 80% compliance and we are working on continuous improvements. This was truly a team effort and many additional hours of work were devoted to achieving this result.





*Congratulations to CEO Anna Harrison AM JP on her investiture as a Member of the Order of Australia*

In response to the audit, we developed an array of support and care plans for clients using our home support and social support services. We also developed a clinical care plan with validated clinical assessment forms and risk assessment tools and established an internal quality clinical care working group to manage the coordination of services for high-risk clients.

In addition, we rolled out an organisational continuous improvement plan. Out of 47 action items, we had completed 41 by 30 June 2023.

We are confident we will achieve 100% compliance when we are audited again, given all the improvement measures that have been taken in response to the audit report.

### **My Aged Care specialist verification**

Umbrella Inc. is now verified as a specialist on the Australian Department of Health and Aged Care's My Aged Care portal for:

- People from culturally and linguistically diverse (CaLD) backgrounds; and
- Lesbian, gay, bisexual, transgender, intersex and queer (LGBTIQ+) people.

### **Work Health & Safety Committee**

We established the inaugural Umbrella Work Health & Safety Committee which meets monthly and appointed health and safety representatives from across the organisation.

### **Pricing reform**

We restructured pricing for some of our services to ensure financial sustainability and to comply with changes imposed by the Aged Care Commission. No clients left because of the pricing reform.

## National Aged Care reforms

Leading up to the implementation of the Commonwealth's new streamlined Support at Home program due in mid-2025, we have implemented new reporting processes and managed significant changes to funding mechanisms.

A series of new policies around service delivery have been developed such as the Code of Conduct and Certificate III training requirements for support workers.

We also developed an information and communication plan; a fee for service plan and a recruitment, retention and succession plan.

## New funding

- We were awarded 350% growth funding from the Commonwealth Government for the new Aged Care Volunteer Visitors Scheme that replaces the Community Visitors Scheme (CVS).
- We were awarded over \$1.2 million in funding over three years from the Commonwealth Government for the new care finder service which we are delivering across the Perth metro region to help people get started on their aged care journey and access the support and services they need.

## Professional development

The following industry training was conducted in the year in review:

- 30 employees were prepared for the introduction and implementation of the Aged Care Reform Code of Conduct for Aged Care and the Serious Incident Response Scheme
- 2,551 Aged Care Learning Information System (ALIS) courses were completed by 254 employees registered as users with the Aged Care Quality and Safety Commission (as of 6 June 2023)
- 39 employees attended preventing bullying and harassment training.

A total of 300 staff also attended the following external training programs:

- Certificate III Individual Support (Ageing) facilitated by registered organisation Healthlink Training
- Dementia Essentials (CHCAGE005 – provide support to people living with dementia) facilitated by Dementia Australia
- Enabling Edie facilitated by Dementia Australia
- Let's Talk Grief facilitated by the Australian Centre for Grief and Bereavement
- Stay on Your Feet fall prevention training facilitated by Injury Matters
- First aid training to support staff and clients in the event of an incident
- Manual handling training facilitated by BodySmart
- Fire warden and practical fire equipment training facilitated by WA Fire
- Food safety training.

## New Incident Management System

The Incident Management System was revised to support the implementation of the Serious Incident Response Scheme (SIRS) in December 2022. As a result, we upgraded documents and the management of data to ensure Umbrella will comply with mandatory reporting timeframes for SIRS.

## Contractor compliance

To identify and address gaps in the management of contractors delivering home care package services, we established a new external contractor compliance system.

This has resulted in increased compliance by contractors servicing clients that request or require specific services not offered by Umbrella. The new framework will give us better oversight and management of contracted client services.





*The Multicultural Village Hub Strength and Balance participants with the program's Injury Matters Award*

## Awards

We were proud to have received the following awards:

- Injury Matters WA – Outstanding Achievement in Empowering WA to Prevent Injury or Support Recovery – for the Multicultural Village Hub Let's Get Moving project
- Finalists for the Belmont and the Western Australian Small Business Awards 2022 in the Community Spirit category
- Office of Multicultural Interests Western Australian Multicultural Award 2023 Finalist for Outstanding Individual Achievement - Henrietta Podgorska
- Volunteering WA – WA Volunteer for Multicultural Communities Award - Karla Benitez.



*Henrietta Podgorska – finalist in the Outstanding Individual Achievement Award from the WA Office of Multicultural Interests*



## Board **Members**

Umbrella's Board is a supportive group of committed professionals with extensive experience in fields such as aged care, health services, advocacy, government relations, information and communication technology, law and public policy.



**Marika Krstevska**  
President



**Dorota Pietowska**  
Secretary



**Dr Anna Golab**  
Treasurer



**Dr Rita Asfar**  
Board Member



**Ann Rial**  
Board Member



**Beata Larcombe**  
Board Member



**Krzysztof Wozniak**  
Board Member



**Helen Elliott**  
Board Member



# Leadership Team

We are a team of experienced professionals with a wide range of skills, experience and cultural backgrounds. We share a passion for making a difference to the lives of seniors from culturally diverse and LGBTIQ+ communities.



**Anna Harrison AM JP**  
Chief Executive Officer



**Henrietta Podgorska**  
Operational Programs  
Manager



**Robert Wilhelm**  
Social Support Groups  
& Transport Manager



**Theresa Ng**  
Finance Manager



**Carol Bosman**  
Human Resources  
Manager



**Karla Benitez**  
ACVVS & Volunteers  
Manager



**Fiorda Kule**  
Multicultural Manager



**Donna Gibson**  
Communications,  
Engagement &  
Projects Manager



**Magda Wojcik**  
Social Support  
Programs Assistant  
Manager



**Barbara Kozok**  
Social Support  
Programs Assistant  
Manager



**Dominic Toczyski**  
Information  
Technology Manager



**Sue Pike**  
Clinical Team Leader



*At Karaoke with an Accent*

## Communications, Engagement and Projects

Formerly known as the Marketing Department, this team underwent a name change in May 2023 to better reflect its core function and its multi-faceted approach to working with clients, volunteers and external stakeholders.



*At the Care & Ageing Well Expo*

Its primary responsibilities are external communications, stakeholder and community engagement and short-term community projects.

The projects it is responsible for are the three-year Multicultural Village Hub, funded by the Australian Department of Social Services, and the Rainbow Migrants project funded by the Western Commonwealth Government's Office of Multicultural Interests.

### External communications

Significant achievements in the year under review included the revamping of the Umbrella website to ensure it is more user-friendly, informative and representative of the organisation. This was completed in-house with support from an external graphic design agency.





*Visit by Hon Donna Faragher MLC, Shadow Minister for Seniors and Ageing*

Another focus was producing new communications collateral for various Umbrella programs such as the Commonwealth Home Support Program, Home Care Packages, the Aged Care Volunteer Visitors Scheme and the care finder program. The generic Umbrella brochure was also updated and a new induction booklet produced for onboarding staff.

Umbrella's social media strategy was reviewed and relaunched with an emphasis on sharing events and activities, focusing on our clients, staff and significant milestones.

External communications support was provided to the Multicultural Village Hub and the Rainbow Migrants projects to ensure project events and activities were well-publicised and participants and stakeholders kept informed.

Future initiatives will include a new external newsletter for stakeholders and clients, planned for early 2024, as well as a targeted media strategy for Umbrella to raise its profile.

## Engagement

Umbrella continues to participate in government and agency project advisory groups, sector committees, networks and advocacy groups. We also participate in various exhibitions and forums to assist seniors navigate the aged care system.



*City of Mandurah Mayor Rhys Williams and CEO Anna Harrison AM JP*

We are currently part of the Cancer Council's cancer resource development project, which is developing communications material, both print and digital, for culturally and linguistically diverse cancer patients in Western Australia.

Numerous engagement opportunities were leveraged with aged care, multicultural and LGBTIQ+ service providers, government funders, academics and research organisations to ensure Umbrella remains at the forefront of the sector and fulfills its service delivery and funding commitment obligations.

Our approach to engagement is one of meaningful collaboration to build the capacity of the multicultural, aged care and LGBTIQ+ communities to participate in decision-making and funding distribution at state and national level and access the services they need.



*Excursion to Sepentine Falls*

## Multicultural Village Hub

**Umbrella's Multicultural Village Hub targets residents in the City of Belmont and the City of Bayswater aged 55+, including those from culturally and linguistically diverse backgrounds.**

Umbrella's model is based on three pillars – Connect, Learn and Share - and includes a mix of new and established social, cultural and educational activities and events to accommodate the interests, capabilities, and cultural backgrounds of participants.

The Hub is funded by the Department of Social Services as part of a Village Hub pilot programme, with 12 Hubs across Australia funded until June 2024, three of them in Western Australia. It was established with the goal of building community capacity to enable it to transition to a volunteer-led programme at the end of the funding period.

### Women's Grant for Stronger Futures

In March 2023, the Hub was awarded a \$10,000 grant from the Department of Communities to promote health and wellbeing, financial literacy and social confidence amongst culturally and linguistically diverse women (55+) through educational workshop and nature-based social activities.

Run in partnership with Co-Connect and a range of other community service providers, the three-month program supports Vietnamese and Mandarin speaking women.

### Injury Matters Award

The Hub was awarded Outstanding Achievement in Empowering WA to Prevent Injury or Support Recovery from Injury Matters in May 2023.

The award recognises the exceptional efforts of our Let's Get Moving project, which offered strength and balance activities for falls prevention for older adults from multicultural backgrounds.

### First birthday celebration

The Hub celebrated its first birthday on 24 June 2023 by hosting a community event for our extended Umbrella family, including clients, friends and volunteers. Over 80 people attended.

Performers showcased traditional music and dance from countries such as China, Japan, Italy, Spain, Russia and Ukraine. Special guests included the Chinese Deputy Consul-General Mr Wang Fengzhong, Mayor of the City of Belmont, Cr Phil Marks and Umbrella Board President Marika Krstevska.





Bus trip to Collie

### Quick Snapshot:



**10** volunteers

**176** registered participants

**50+** unidentified participants

**15** programs

**125** events

**1190** sessions

#### Age

Most participants are aged 60 to 74.

- 23% aged 60-64
- 25% aged 65-69
- 23% aged 70-74

#### Gender

- 30% male
- 70% female

#### Living arrangements

A total of 43% of registered participants and support people have provided this information.

- 44% live alone
- 43% live with a partner.

#### Deliverables

Of the sessions, 57% have been run by bilingual volunteers or had interpreters present.

- Average of 19 participants per program
- Average attendance of 9 per session.

#### Cultural background

80% of participants are from culturally and linguistically diverse backgrounds.

#### Highlights

- *One-on-one technical support program*
- *Polish strength and balance group*
- *Social day trips*
- *Bush walking group*
- *Community education workshops*
- *Two intercultural music events run in December 2022 and June 2023*

## Client Feedback

### First Birthday Multicultural Concert

We received 29 responses to our feedback survey distributed to attendees, all of which were very positive. All respondents selected strongly agree (SA) or agree (A) for the following statements:

- Today's event helped me feel more socially connected (62% SA, 38% A)
- The event celebrated different cultures (66% SA, 34% A)
- The event recognised and celebrated seniors (45% SA, 55% A)
- I learned about local programs and activities (38% SA, 62% A).

A total of 97% of respondents were born overseas and 69% spoke a language other than English at home.

Of those born overseas, 41% were Polish and others were from Burma, China, France, Hong Kong, India, Indonesia, Ireland, Japan, Malaysia, Netherlands, Philippines, Scandinavia, Sri Lanka and the United Kingdom.



First birthday concert performance

### What lies ahead

We are currently developing a program for Eritrean and Afghan seniors experiencing social isolation. We are co-designing this with volunteers from these communities.

This is the final year of Village Hub funding. A Community Working Group has been established and is meeting monthly for 12 months to develop a plan for a sustainable Multicultural Village Hub project after the completion of the grant in June 2024.

### Client quotes

#### Stay on Your Feet program participants:

*"Participating in this program was wonderful. I met new friends and was able to learn new skills."*

*"With my age and me exercising in the pool (five times a week), I highly recommend strength and balance exercise to everyone. It's great for my physical and my mental wellbeing exercising with other people."*

#### Bridge the Gap program participants:

*"Great fun and varied activities - well done!"*

*"Enjoyable, colourful, great food, bright room. Thank you!"*

*"A wonderful afternoon of cultural diversity, delicious and fun."*

*"Loved the interaction! Great incentive for the local community."*

*"Beautiful performance, food, and people."*

*"It was brilliantly organised and very informative."*



Injury Matters Grant group at their end-of-year celebration



Walking group at Mundaring Weir





## Multicultural Library

The Umbrella Multicultural Library provides a safe and supportive space for seniors from culturally and linguistically diverse and LGBTIQ+ backgrounds to enjoy more than 3,000 books in over 30 different languages.

It is located at the support centre in Belmont and is easily accessible to clients who are brought to Umbrella for social groups during the week. Umbrella clients, staff, volunteers and board members are eligible to use the library and to borrow items for free.

Seniors living in the City of Belmont who are not clients may also join the library for free while seniors not residing in the City of Belmont can join the library for a \$5 life membership.

More than 500 books were borrowed in 2022/2023 and, during the last 12 months, the library has received several donations of books, mostly in Polish, Italian and English. Borrowing activity has varied throughout the year, with Polish, English, Italian and Macedonian books being the most popular.



The library is also used as a meeting space for a one-on-one digital support program and upcycle and repair group and offers a space for smaller groups to gather. Currently, the library has books in:

- English
- Polish
- Spanish
- Italian
- Czech
- German
- Dutch
- French
- Slovak
- Hungarian
- Danish
- Thai
- Chinese
- Japanese
- Tamil
- Vietnamese
- Serbian
- Hindi
- Serbian
- Macedonian
- Swedish
- Portuguese
- Croatian
- Indonesian
- Russian
- Maltese
- Ukrainian
- Hebrew
- Malay





## Rainbow Migrants

**Rainbow Migrants is not just a project; it's a movement to create a more inclusive, supportive and vibrant community for all LGBTIQ+ migrants in Western Australia.**

Funded by the Office of Multicultural Interests and administered by Umbrella, it is exploring the profound impact of diverse migration experiences on self-perception, perception of others and their implications.

These experiences, unique even among migrants from the same country, contrast with those of local LGBTIQ+ individuals. Their enduring influence impacts lives and informs public health policies in Australia, as LGBTIQ+ individuals continue to arrive in greater numbers.

### Goals

The Rainbow Migrants project, the first of its kind in Australia, is dedicated to empowering and supporting multicultural and multilingual LGBTIQ+ communities in Western Australia. Our mission is to help them navigate their unique LGBTIQ+ experiences and settlement successfully.

We are committed to enhancing self-reliance, increasing access to services, and expanding professional and social networks. Our project is designed to address the distinct needs of LGBTIQ+ migrants, recognising their heightened vulnerability to social and economic exclusion and exposure to various forms of discrimination.





Pride Fest at the University of Western Australia

## Objectives

### Community Intervention

We engage our community through mapping, co-designing and piloting community interventions. Activities include individual consultations and co-design workshops.

These initiatives actively involve 64 Rainbow Migrants in Western Australia. The activities encompass befriending, peer support, service navigation and training sessions on crucial topics like intimate partner violence, housing, equal opportunities and employment.

### Intersectional model development

Our project aims to pioneer an intersectional service design model. This model will provide invaluable guidelines for designing inclusive services that cater to the diverse needs of our vulnerable and underserved populations.

### Awareness raising

We actively promote intersectional approaches as an effective means of recognising and addressing the unique needs of diverse and hard-to-reach populations. Through training and awareness-raising workshops, we've reached out to 42 culturally and linguistically diverse LGBTIQ+ and mainstream service providers and community organisations.

These activities have unveiled a pressing need for targeted support for multicultural, multilingual, and multifaith LGBTIQ+ individuals.

We run weekly legal information sessions for migrants in partnership with the Northern Suburbs and Green Circle Community Legal Centres on a range of topics, including tenancy laws in Australia, intimate partner abuse and employment rights.

### Community of practice

Our ultimate objective is to establish a Rainbow Migrants community of practice, using resources from the pilot phase of the project. This community will serve as a hub for shared knowledge, experience and support.

Our exploration has revealed a strong preference for tailored engagement and participation. We are committed to providing gender-specific services, conducting workshops in diverse locations and ensuring online participation for accessibility.

We also offer individual consultations, maintaining confidentiality through a cultural safety and risk management plan overseen by a dedicated cultural safety consultant.

We have increased visibility through participation in pride awareness events and our innovative Karaoke with an Accent event in partnership with Connections Nightclub.

# Home Support Services

Umbrella is funded by the Commonwealth Department of Health and Aged Care to deliver Commonwealth Home Support Program services (CHSP) and Home Care Packages (HCP).

We provide home support services across the Perth metro and Peel regions. Our mission is to help clients stay in their homes as they age and enjoy the best quality of life possible.

Our home support workers are trained to provide clients with support in their own homes. They are assigned clients in accordance with their individual levels of expertise.

They also speak a variety of different languages and, where possible, they are matched with the clients' cultural and language preferences.

In the year in review, we had 82 support workers who spoke 27 different languages.

## Types of support

Once clients are registered with the Commonwealth's My Aged Care program, each client is individually assessed to determine the level of support required.

Two different types of support are funded by the Commonwealth Department of Health and Aged Care and are currently delivered by aged care providers such as Umbrella.

**The Commonwealth Home Support Program (CHSP)** is the entry-level program offering essential services to clients of 65 years or older who have been assessed as requiring support with everyday living.

**Home Care Packages (HCP)** are designed for clients of 65 years and older with more complex care needs. They provide a coordinated approach to delivery of support at home. Clients can design their own services in consultation with us and in accordance with the level of government funding they qualify for.

Eligibility for HCP support is not affected by a client's financial situation. However, clients may need to have an income assessment through Services Australia to determine how much they may be asked to contribute.

There are currently four service levels for government-funded home support. Depending on the level of funding per client, we develop individualised care plans to assist with a range of daily activities from bathing and showering to toileting and dressing, mobility, preparing and eating meals, laundry, home help/housekeeping tasks, and light gardening.

We offer rehabilitative support and transport to shops, social activities, and medical appointments. For those needing respite care, we provide temporary respite in the home.

We also assist in arranging social activities and providing transport to social functions for clients who select social support as part of their home care package.

Umbrella works closely with other community care services on a contractual basis. These include community nurses, meals on wheels, community transport, community day centres, home modification services, podiatry, physiotherapists, and occupational therapists.

In 2022/2023, significant changes were announced to the Social, Community, Home Care and Disability Services Award (SCHADS) which were implemented on 1 July 2023.





*"The gardener is very professional. Once he gets here, he gets on like a machine. He always makes sure my access to my garden is safe."*

– Umbrella CHSP client



The home support services team were required to make changes to the payroll, the client management system and the scheduling process to ensure that Umbrella was ready to implement the new award.

The team also updated each client's individual care plan, working with clients directly to focus on achieving overall wellness and mitigating health risks. These updated plans were uploaded to the new client management system to ensure all home support workers can access client documentation easily via a mobile phone application.

From 1 July 2024, the Commonwealth Department of Health and Aged Care will be combining the CHSP and HCP services into one, streamlined home support program. Umbrella has provided input into the consultation process as part of the Australian's Government extensive stakeholder engagement strategy surrounding the aged care reform that is underway.

## Commonwealth Home Support Program (CHSP)

The CHSP program is run by one coordinator who reports to the home support services manager and is assisted by three home support schedulers who manage the client rosters.

In the year under review, our CHSP team supported 510 clients. They were assisted with a range of daily activities from bathing and showering to toileting and dressing, mobility, preparing and eating meals, laundry, home help/ housekeeping tasks, and light gardening.

We also offered rehabilitative support and transport to shops, social activities and medical appointments. We also provided temporary respite for carers in the home.

## Hours dedicated to CHSP

In 2022/2023, the following hours were dedicated to delivering the CHSP program:

Type of support	Staff	Contract
Domestic duties	6,724	8,422
Social support	1,785	7,735
Respite	497	284
Personal care	541	945
Home maintenance	1,825	1,206
Transport to social support groups	19,060	18,264
<b>Total hours</b>	<b>30,432</b>	<b>36,856</b>
<b>Total combined hours</b>	<b>67,288</b>	
<b>Average total hours per client</b>	<b>132</b>	



### Client quotes

*"I am really happy to have someone to talk to me in my own language and to have help around the house. My washing machine was not working. My support worker was able to work out how to get it working again."*

Umbrella CHSP client

*"Today's service was wonderful. The support worker did her usual tasks, but also kindly cooked a cultural dish for my dad. Your support workers are very kind."*

Umbrella HCP client

## Home Care Packages (HCP)

Individualised home care packages for clients are developed and delivered by the HCP team, which was led by a team of six coordinators and one administration officer. The coordinators report to the home support services manager.

They were supported by a clinical care team of three registered nurses for clients needing higher levels of care in the home, as well as the three home support schedulers who are shared with the CHSP team.

In the year in review, we provided 158 clients with HCP services on the following package levels:

Level 2: 35

Level 3: 64

Level 4: 59

## Hours dedicated to HCP

In 2022/2023, the following hours were dedicated to delivering HCP services:

Type of support	Staff	Contract
Domestic support and meal preparation	13,285	745
Social support (individual)	17,727	0
Social support (group)	15,403	0
Respite	95	0
Personal care	6,032	226
Home maintenance	1,627	492
Transport	100	31
Nursing	1,049	0
Allied health services	0	1,759
<b>Total</b>	<b>55,318</b>	<b>3,253</b>
<b>Total combined hours</b>	<b>58,571</b>	
<b>Average total hours per client</b>	<b>371</b>	

## Umbrella HCP client map







## Social Support Group

**Our social support services are what sets Umbrella apart from many other aged care providers. Our extensive social support program is renowned across the Perth metro and Peel regions.**

Once a client visits our social support centre at Belmont in Perth's eastern suburbs, they become part of our colourful Umbrella family.

Our program provides an opportunity for seniors to actively participate in a range of activities including half-day and full-day excursions, concerts, physiotherapy with music, arts and crafts, picnics, barbecues, information sessions and more.

Clients who attend these programs appreciate spending quality time with other people from the same cultural background. Some clients don't speak English and these programs protect them from social isolation.

Clients report that being a part of a social support group is like having a second family. They also get the opportunity to meet new people.

They are supported by a team of very special social support workers who speak their language, come from the same cultural backgrounds as they do and look after them as though they are their own family members.

In the year in review, over 100 individual care plans were completed for social support clients, including clients who are receiving home support from other aged care providers, but come to Umbrella for social support under brokerage agreements between Umbrella and other service providers.

Our social support staff are all completing their Certificate III in Aged Care and underwent accredited dementia support training.



### Golden Age Clubs

These are based at our support centre and run Mondays to Fridays. Clients are collected from home and brought to our support centre. They enjoy a three-course lunch cooked in our very own commercial kitchen and they are dropped back at home in the afternoons.

### Home @ Home

These are outings to various local and regional locations in our fleet of buses and vans with lunch provided and we have four different groups: Italian, Macedonian, Polish and Multicultural (all nationalities).

### Party at Basia's

Every second Friday, we host a Party at Basia's at our support centre with lunch, music and dancing. We invite guest musicians to entertain the clients with music from their countries of origin and they dance the afternoon away.

### Internet café

We offer clients digital skills training at our support centre using our own computers. We provide transport to the centre and light refreshments.

### Local excursions

- Sculptures by the Sea in Cottesloe
- Kalamunda Historic Village
- Crown Casino
- Hillary's Boat Harbour
- Mundaring Weir
- Araluen Botanic Garden
- Caversham Park
- Pirate Ship Tours Mandurah
- Fremantle Ferris Wheel Adventure
- Parliament of WA Tour
- Herdsman Lake Wildlife Discovery Centre
- Matagarup Bridge
- Woodbridge House
- Swan Valley
- Various parks, galleries and museums.

### Special celebrations we held

- Valentine's Day
- Easter
- Diwali
- Melbourne Cup
- Christmas
- New Year's
- Australia Day
- ANZAC Day
- Chinese New Year
- Halloween
- Ferragosto
- World Dumpling Day
- Oktoberfest
- International Women's Day
- Have a Go Day Festival
- Grandma's Day and Grandpa's Day
- Anniversary of Home @ Home
- Independence Day (Polish, Italian, Macedonian)
- Client birthdays (including one 100th birthday)



## Quick facts:



We provided social support to over **400** clients a week.



We welcomed over **100** new clients.



We provided **52,922** hours of social activities.



We provided **19,060** client trips.



We have a fleet of **25** vehicles including **12** buses.



## Client quotes

*"Umbrella is the best medicine for my mum's depression."*

*"I am always waiting for the driver in the morning with excitement as I can't wait to come to Umbrella and attend activities."*

*"Do you know how much I love coming to Umbrella? It is time to put a lipstick on and I am ready."*

*"When I go to Umbrella on Wednesdays, nothing hurts."*

*"I want to let you know how much I appreciated the Umbrella driver coming to get mum from my house. When he pulled into the driveway, it started to rain very badly. He got an umbrella and came to get mum. This is a very good gesture. It made mum feel very important. This is why she loves coming to the centre."*





## Aged Care **Volunteer** **Visitors Scheme**

**The Aged Care Volunteer Visitors Scheme (ACVVS) was formerly known as the Community Visitors Scheme (CVS) and is a nationwide program funded by the Commonwealth Government.**

It is designed to facilitate volunteer visits aimed at providing companionship and friendship to seniors living in isolation.

Our focus at Umbrella is on seniors from culturally and linguistically diverse (CaLD) backgrounds and those who identify as gender diverse (LGBTIQ+), whether they reside in their own homes or in residential care facilities across the Perth metro.

The ACVVS offers a free service that significantly benefits seniors by:

- Improving self-esteem and wellbeing
- Increasing their sense of purpose
- Maintaining and increasing independence and their sense of belonging
- Reducing loneliness and isolation
- Increasing longevity
- Developing social connections.

Our dedicated volunteers visit our clients at least once every fortnight. During these visits, they engage in activities that both the volunteer and the client enjoy. This may be simply having a friendly chat, sharing a cup of tea, playing board games, strolling through the garden, enjoying music together, or exchanging life experiences.

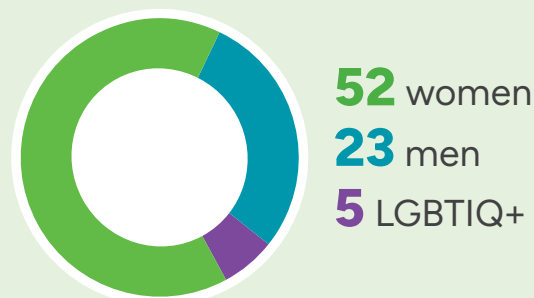
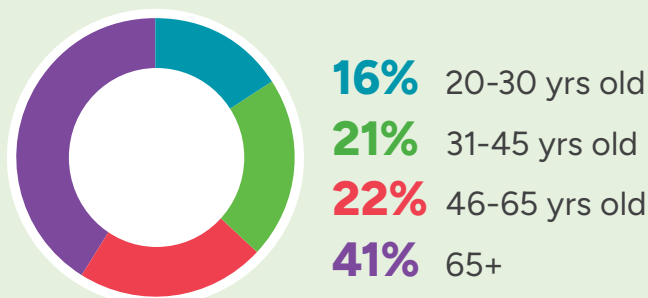
Towards the end of the year under review, we were granted a substantial increase in funding from diverse sources, including Commonwealth and State Government grants. This funding will be instrumental for the next three years in not only sustaining our program, but also expanding its reach and impact.

It has also resulted in Umbrella's program becoming the largest and most diverse in Western Australia. In the year in review, we provided services to 95 clients across the north, east, southwest, and southeast metro areas.

Our devoted team has witnessed remarkable growth, welcoming new members who fully embrace our mission. This expansion has enabled us to enhance the scope and efficiency of our services.



## Demographics of our volunteers



## Our volunteers

The volunteer team comprises 80 volunteers from many different cultural backgrounds including Australia, Poland, Italy, Croatia, Russia, Spain, Macedonia, Hungary, Mongolia, China, Iran, Vietnam, Greece, Burma, Germany, Taiwan, Indonesia, Egypt and Ukraine.

Collectively they speak multiple different languages including English, Polish, Italian, Spanish, Portuguese, Serbian, Russian, German, Ukrainian, Mongolian, Dutch, Arabic, Hindi, Macedonian, Greek, Croatian, Dutch Mandarin, Afrikaans, French and Japanese.

In addition, 20% of our volunteers identify as LGBTQ+ and they visit LGBTQ+ seniors.

We attained a 95% volunteer retention rate in 2022/2023.

Umbrella works with the following volunteer resource centres in Perth:

- Swan Volunteer Resource Centre
- Armadale Volunteer Service
- Bassendean Volunteer Resource Centre
- Belmont Volunteer Centre
- Joondalup Volunteer Resource Centre
- Murdoch Volunteer Hub
- Melville Volunteer Resource Centre
- Volunteer Southwest
- Rockingham Volunteer Centre.

We have also established strong partnerships with over 40 residential aged care facilities and the following home care package providers:

- St Basil's Aged Care Services
- Rise Network
- Silver Chain Group
- Southern Cross Care WA
- Avivo Australia
- Juniper
- Echo Community Services
- KinCare
- Bethanie Aged Care
- Melville Cares
- St Vincent Day Therapy Centre
- Enrich Living Services.

We provide ongoing training and development opportunities for our volunteers. Here is a snapshot of the training our volunteers received in the year in review:

- Ongoing digital skills training
- ACVVS program online training
- Umbrella work health and safety training
- Mindfulness training
- Understanding Dementia by the University of Tasmania
- The Many Faces of Dementia by University College London
- Caring for Older People: A Partnership Model by Deakin University
- Internet of Things for Active Ageing by Taipei Medical University
- Maintaining a Mindful Life by Monash University
- Understanding anxiety, depression, and physical illness by King's College London.

We are committed to making a positive impact on the lives of more seniors in our community into the future and we plan to intensify our efforts to reach out to underserved communities in the Perth metro to identify seniors and volunteers who may benefit from our program.



### Client quotes

**Irma**, a senior from a CaLD background who recently turned 100, had been feeling isolated for years. Since joining the program, she has formed a strong bond with her volunteer, Nilda. *"Nilda's visits have given me a new sense of belonging for the last 10 years. We talk about our cultures and laugh a lot. I don't feel alone anymore," says Irma.*

**Gary**, a gender-diverse senior, struggled with acceptance throughout his life. Through the Umbrella program, he connected with Daniel, a supportive volunteer. *"Daniel has been a true friend. He listens without judgment, and I finally feel seen and accepted for who I am," says Gary.*

**Maria**, originally from a CaLD background, had been battling loneliness and depression. The regular visits from her volunteer, Sophia, have brought significant positive change. *"Sophia's visits have lifted my spirits. We enjoy cultural exchanges, and I've started painting again. My self-esteem has soared," says Maria.*



### Volunteer quotes

**Valentina**, originally from Italy, joined the program to connect with seniors from similar backgrounds. She vividly recalls her first meeting with Tindara, an elderly woman from the same region. *"When I first visited Tindara, her eyes lit up, and she started speaking Italian. It felt like we had known each other forever. Now, our visits are filled with laughter and shared memories," says Valentina.*

**Rene**, a bilingual volunteer, uses his passion for music to bridge language barriers. He recalls a heartwarming experience with his client Mr. Walter, who spoke limited English. *"I brought my guitar to our visits, and music became our universal language," says Rene. "Mr. Walter and I would strum along, and he taught me some beautiful tunes from his homeland."*

**Kristina**, a young volunteer of Macedonian descent, formed a unique bond with Mrs. Zorka, an elderly woman from Macedonia. *"Our visits often involve storytelling and sharing experiences from our two different generations. Mrs. Zorka has become like a grandmother to me, imparting wisdom and cultural insights," says Kristina.*



# Care finder program

The new care finder program was created as a direct response to the recommendations of the Aged Care Quality Commission's investigation into the standard of care provided to older Australians.

It targets seniors of 65 years and older who are eligible for aged care services and require intensive support to interact with My Aged Care, access aged care services and link in with other relevant support services in their communities.

The program is offered free of charge to clients as it is fully funded by the Commonwealth Department of Health and Aged Care and is managed by the Primary Health Networks. In Western Australia, it falls under the Western Australian Primary Health Alliance. It offers face-to-face visits with clients to support them in navigating the aged care system and to educate them about the support services they are entitled to once they are registered with My Aged Care.

While care finder has been co-located with various aged care providers across Australia, it runs independently, with care finder staff offering individual consultations and independent referrals to various providers.

Umbrella is one of several aged care providers in Western Australia to have received funding to offer the program and it is the only multicultural aged care provider providing the care finder service across the Perth metro region. Our care finder program was launched in April 2023, will run until May 2025 and has received \$2 million in funding from the Australian Government.

## Communities we service

### North metro

This includes areas like Bassendean, Bayswater, Cambridge, Claremont, Cottesloe, Joondalup, Kalamunda, Mosman Park, Mundaring, Nedlands, Peppermint Grove, Perth, Stirling, Subiaco, the Swan and Wanneroo.



### South metro

This includes Armadale, Belmont, Canning, Cockburn, East Fremantle, Fremantle, Gosnells, Kwinana, Mandurah, Melville, Murray, Rockingham, Serpentine-Jarrahdale, South Perth, Victoria Park and Waroona.

## Progress to date

In the first few months of the program, our care finder team has attended numerous aged care networking events and presented to a number of Councils to raise awareness of the services offered to marginalised seniors.

Training sessions have also been conducted for frontline staff of partner organisations. The program has been promoted through a marketing campaign including newspaper adverts and articles in aged care sector publications and service directories.

Currently, care finder is providing services to a diverse group of clients, with 90% of them coming from culturally and linguistically diverse backgrounds including the Philippines, India, Italy, the United Kingdom, Hungary, Vietnam, Germany and South America.

Wherever possible, clients are provided support in their own language by a team member of the same or a similar cultural background.

An outreach program in the Shire of Waroona is in its early stages, in partnership with the Council and other service providers in the area.

# Human Resources

**The proposed Aged Care Quality Standards to be implemented on 1 July 2024 will ensure that aged care staff understand and value seniors, including their gender identities, cultural diversity, beliefs and life experiences.**

The way they engage with older people to support them and make them feel safe will be paramount. Care and service needs will be required to be met by skilled and competent workers who hold relevant qualifications and have relevant expertise and experience to provide safe and quality care.

The provider must maintain records of staff pre-employment checks, qualifications and experience. Staff must have access to supervision, support and resources.

The provider must ensure training programs are in place to provide staff with the necessary skills and competencies to effectively perform their roles.

Umbrella is represented on the North Metro TAFE's Care Community Industry Advisory Group. The role of the group is to provide guidance in relation to human resources matters such as attracting and retaining staff in the home care sector; managing induction and training programs; supervision and mentoring models; work placements; evaluation; employment pathways and continuous improvement.

Two Umbrella employees were recognised for their outstanding contributions to the organisation in December 2022. Both were home support workers and were nominated by their fellow employees. They were Jerzy Rembiasz and Shamali Karunarathna Mudiyansele.

## Overview

The key responsibility of the Human Resources team of just three staff is the management of the employee life cycle. This incorporates the following seven stages:

- Recruiting
- Onboarding
- Training
- Managing performance
- Record keeping
- Exit
- Cessation

The main achievements for the team in the year in review were:

- Implementing a new support worker recruitment procedure
- The updating of policies and procedures including Code of Conduct, Mobile Phone Policy and the First Aid Policy
- Developing a new staff induction manual
- Introducing a new performance management system including annual performance appraisals being moved from July each year to each individual's work anniversary
- The holding of a Recruitment Open Day for support workers
- The contracting of a new Employee Assistance Program for all staff
- Contributing to successful accreditation inspections at Umbrella.

Key challenges relating to the new Fair Work legislation and the new Aged Care Standards (to be implemented in July 2024) were addressed in the following ways:





## Fair Work legislation

- Minimum wage increases were effected
- Paid family and domestic violence leave was introduced
- Policies were aligned with new sexual harassment laws
- Procedures were put in place to comply with new pay confidentiality and job advertisement laws
- Changes to parental leave entitlements were made
- Protections for migrant workers were complied with
- Policies and procedures were amended to align with industrial relations reforms.

## Aged Care Standards

- Training in the current aged care standards was mandatory for all new staff members
- Briefings on the new standards to be introduced in July 2024 were held internally
- Management team members attended external briefings and participated in industry consultation sessions on the new standards
- New recruitment and governance guidelines were developed
- Staff qualification and skill requirements were revised to comply with the new standards.

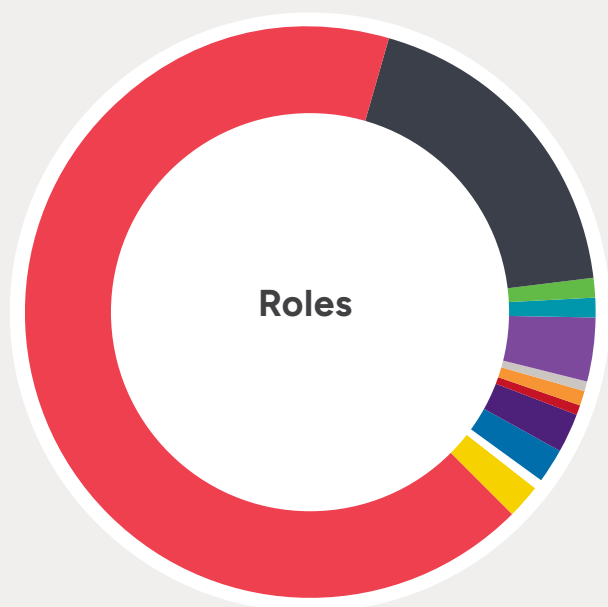
## Employees recruited in 2022/2023

### Administration staff

Department	Number	Culture
Executive	1	Singaporean
Human Resources	2	Dutch; French
Care finder	2	Bhutanese; English
Home Support Services	5	Dutch; Croatian; English
Commonwealth Home Support Services	1	Indian
Social Support Services	1	Polish
Finance	1	English
Compliance & Training	1	English
Communications, Engagement & Projects	1	Polish

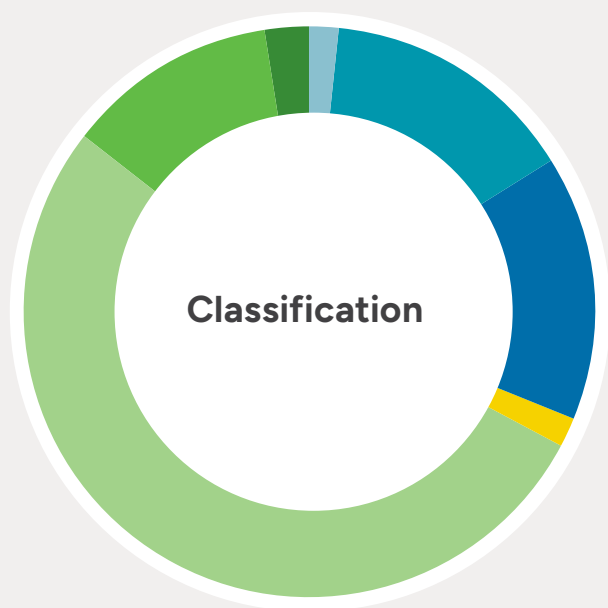
### Support workers

Department	Number	Cultures
Home Support Services	36	Somalian; Ukranian; Spanish; Portuguese, English; Polish; Japanese; Indian; Pakistani; Kenyan; Congolese; Sudanese; Hungarian; Croatian; Italian; Bhutanese
Social Support Group	3	Italian; English; Spanish



### Employee breakdown by role

Support workers	112
Office workers	31
Human Resources	2
Information Technology	2
Finance	6
Payroll	1
Comms, Engagement & Projects	1
Compliance & Training	1
Customer Service	4
Scheduling	3
Executive	1
Clinicians	3
<b>Total employees</b>	<b>167</b>



### Employee breakdown by classification

<b>Administration</b>	<b>52</b>
Casual	3
Part-time	24
Full-time	25
<b>Clinicians</b>	<b>3</b>
<b>Support workers</b>	<b>112</b>
Casual	88
Part-time	20
Full-time	4



# Training and Compliance

The training and compliance function encompasses quality management; training; policies and procedures; workplace health and safety and compliance.

The Aged Care Quality and Safety Commission conducted an audit to assess the quality of our home care services against the eight aged care quality standards in late 2022.

The audit involved a site assessment, observations of staff providing care, a document review and interviews with staff, clients, and their representatives. The audit finding was a score of 80%, with recommendations made to focus on continuous improvement against the following standards:

## **Standard 3: Personal care and clinical care**

- Demonstrating the delivery of safe and effective clinical care that is best practice
- Evidencing referrals to health professionals are consistently sought when issues are identified.

## **Standard 8: Organisational governance**

- Demonstrating information management systems include for the social support centre
- Providing adequate information for staff to understand client needs and preferences
- Evidencing that incidents are being consistently reported and followed up in a timely manner.

## **Aged Care Reform**

The Aged Care and Other Legislation Amendment (Royal Commission Response) Act 2022 required all home care services from 1 December 2022 to strengthen their governance requirements and implement a new Code of Conduct for aged care workers.

This included banning orders for serious offences and incident management





and reporting obligations for home care services under a new Serious Incident Response Scheme (SIRS).

This required Umbrella to identify incidents and near misses, take reasonable and timely action to assess and respond to incidents and support those affected.

We improved our systems, processes and practices to prevent further incidents and we notified the Commission of all reportable incidents. All incidents were resolved and required no further investigation.

There are eight types of incidents that are required to be reported to the Commission:

1. Unreasonable use of force
2. Unlawful sexual contact or inappropriate sexual conduct
3. Psychological or emotional abuse
4. Unexpected death
5. Stealing or financial coercion by a staff member
6. Neglect
7. Inappropriate use of restrictive practices
8. Missing consumer.



"A total of 38 staff attained their dementia essentials certificates which increased their knowledge and confidence."

*Home Care Package Coordinator Vitor da Silva taking part in virtual reality training facilitated by Dementia Australia.*

## Training

Umbrella delivered a diversified training program to ensure our staff can safely and competently meet the needs and preferences of our clients.

Over 300 opportunities for training places were filled and included staff being upskilled in priority areas including first aid, food safety, manual handling, responding to grief and loss and fall prevention.

Staff were encouraged to keep up to date with their qualifications to ensure Umbrella continues to deliver high quality of care. This year, we particularly focused our efforts on building a dementia friendly workforce to better support our clients.

A total of 38 staff attained their dementia essentials certificates which increased their knowledge and confidence. This investment in training has supported the establishment of a highly successful social support dementia program at Umbrella.

Training was also provided to all staff on the new Conduct of Conduct for Aged Care which enhances client protection and includes the ability to ban staff from working in the aged care sector.

## Continuous Improvement

Umbrella conducted an internal audit to identify opportunities for continuous improvement and innovation which included quality audit recommendations, resulting in 47 actions being implemented to increase consumer outcomes across the Aged Care Quality Standards as follows.

- **Standard 1** - We introduced training to increase understanding of consumer risk and the aged care standards by subscribing to the Aged Care Quality and Safety Commission Aged Care Learning Information Solution.
- **Standard 2** - We implemented an effective response to risks for social support clients with special needs by introducing a colour-coded name badge system.



- **Standard 3** - Clients receiving clinical care are assessed using a validation assessment tool that is tailored to their needs and optimises their health and wellbeing. Assessment documentation is now available via the digital client management system.
- **Standard 4** - To ensure we prepare meals that meet clients' nutritional requirements and hydration needs there is now clear information about dietary preferences in the client care plans.
- **Standard 5** - To ensure that the service environment is safe and well-maintained, we established a Work Health and Safety Committee and a regular workplace inspection program to identify hazards, including electrical testing and tagging.
- **Standard 6** - We updated our communication process to ensure consumers and their representatives were advised about aged care reforms by letter and given the opportunity to provide feedback.
- **Standard 7** - We provided access to training to enable support workers to increase their qualifications, resulting in 33 workers enrolling to attain their aged care qualifications.
- **Standard 8** - We developed new organisational values of Compassion, Accountability, Respect and Excellence (CARE) which support our mission statement.

## Lookahead

### Quality

A new Quality Advisory Board and Consumer Advisory Panel will be established to support the Umbrella Board of Management and suggest improvements to enhance the quality of care and services Umbrella provides. We will keep our clients and their representatives up to date with opportunities to share our progress as we strive towards best practice.

### Policy and procedures

We will be working diligently to update all our policy and procedures to ensure compliance with the new Aged Care Act and strengthened quality standards which come into effect on 1 July 2024.

## Work Health and Safety

We will engage a risk assessment contractor to carry out an audit on our Work Health and Safety management system to ensure compliance with legislation and promote a healthy, hazard-free workplace.

Our Work Health and Safety Committee will continue to identify issues and progress and prioritise safety in our workplace, including client homes.

## Compliance

Contractors such as allied health professionals that are being utilised to support clients on home care packages will continue to be monitored for performance quality.

## Training

As our workforce continues to grow, we will roll out a revised induction program for new staff to assist them to settle into the Umbrella way.

We will continue to encourage professional development, learning and growth to ensure staff have appropriate skills, qualifications, experience and opportunities to provide high quality client care and services.



*IT Manager Dominique Toczyski has been kept busy this year.*

# Financial Report 2022/23

Umbrella recorded an operating surplus of **\$282,562** in 2022/2023. Total income for the year was **\$10,506,293** and expenditure was **\$10,223,731**.

A total of **\$1,039,228** in growth and ad hoc funding was realised. These funds greatly assisted to cover the initial forecasted deficit and were pivotal in ensuring that we ended the financial year in a surplus position.

## New client management system

A key achievement was the implementation of a purpose-built client management software program called Sandwai, designed specifically for the home care industry. It provides task automation, smart workflows and schedule optimisation.

Benefits to the organisation were as follows:

- Exporting of support worker hours from Sandwai directly into payroll
- Automatic invoicing
- Grant reporting was reduced from four days of manual data entry to 30 minutes
- Accurate data for financial reporting and acquittals
- Paperless process
- Accurate home care packages generated for clients
- Well-presented customer statements
- Modelling of service plan changes with accurate budget calculations and forecasts
- Automatic update of rates and fees in line with Medicare changes
- Reconciliation of Medicare payment summaries and automatic adjustments.

## Cashless client fees

The practice of collecting cash payments for home care services ceased in July 2022. All clients were transferred to direct debit to eliminate cash handling practices. EFTPOS machines were introduced for social support group clients in late 2022 and many clients are successfully using this new payment facility.

## Financial system changes

We implemented a new financial management reporting system called Calxa. This has made our management reports more accurate and provides information in a professional, understandable format. This enables Umbrella to make better business decision-making.

We are also implementing MYOB in 2023/2024 which will eliminate the need for manual time sheets and leave applications and approvals.

The financial audit was completed in record time and auditors noted the improvements in the reporting and the internal controls.

## Home care pricing changes

In line with Commonwealth Government changes, we will be reviewing and restructuring our home support and brokerage fees to ensure we are compliant, financially sustainable and competitive.

## Lookahead

Our focus in 2023/2024 will be to ensure we remain financially sustainable by increasing our efforts to secure ongoing grant funding.

We will also be closely following and participating in the aged care reforms that are underway nationally so that we can respond with agility.



**Umbrella Multicultural Community Care Incorporated Special Purpose**

**Statement of profit or loss and other comprehensive income**

**For the year ended 30 June 2023**

	2023 \$	2022 \$
<b>Revenue</b>		
Grant Income	10,453,455	8,876,551
Other Income	52,838	32,688
Total Revenue	10,506,293	8,909,239
<b>Expenses</b>		
Administration Expenses	(587,230)	(529,408)
Operational Expenses	(1,072,056)	(1,136,476)
Transport and Travel costs	(141,100)	(396,331)
Salaries and Related Expenses	(8,032,013)	(6,775,418)
Depreciation/Amortisation	(364,620)	(259,669)
Lease Interest	(26,712)	(31,496)
Total Expenses	10,223,731	9,128,798
(Deficit) / surplus before income tax	282,562	(219,559)
Income tax expense	-	-
(Deficit) / surplus after income tax	282,562	(219,559)
Other comprehensive income	-	-
<b>Total comprehensive (loss)/income for the year</b>	<b>282,562</b>	<b>(219,559)</b>



## Umbrella Multicultural Community Care Incorporated Special Purpose

### Statement of financial position

30 June 2023

	2023 \$	2022 \$
<b>Assets</b>		
<b>Current assets</b>		
Cash and cash equivalents	1,403,550	1,461,244
Trade and other receivables	722,091	710,998
<b>Total current assets</b>	<b>2,125,642</b>	<b>2,172,242</b>
<b>Non-current assets</b>		
Motor Vehicles	398,555	525,226
Office Furniture & Equipment	145,498	118,672
Lease Bonds	39,987	39,971
Leases (Right of use)	471,468	577,137
<b>Total non-current assets</b>	<b>1,055,508</b>	<b>1,261,006</b>
<b>Total Assets</b>	<b>3,181,149</b>	<b>3,433,247</b>
<b>Liabilities</b>		
<b>Current liabilities</b>		
Trade and other payables	607,948	525,225
Employee benefits	428,108	470,936
Unexpended grants carried forward	272,659	748,614
Lease Liabilities	106,620	98,288
<b>Total current liabilities</b>	<b>1,415,337</b>	<b>1,843,063</b>
<b>Non-current liabilities</b>		
Employee benefits	18,941	19,254
Lease Liabilities	384,393	491,013
<b>Total non-current liabilities</b>	<b>403,334</b>	<b>510,267</b>
<b>Total liabilities</b>	<b>1,818,670</b>	<b>2,353,331</b>
<b>Net assets</b>	<b>1,362,479</b>	<b>1,079,917</b>
<b>Equity</b>		
Retained Earnings	513,495	733,055
Reserves	448,984	346,862
<b>Total Equity</b>	<b>1,362,479</b>	<b>1,079,917</b>



# Independent Auditor's Report

## DIRECTORS:

ROBERT CAMPBELL RCA, CA  
VIRAL PATEL RCA, CA  
ALASTAIR ABBOTT RCA, CA  
CHASSEY DAVIDS RCA, CA

## ASSOCIATE DIRECTOR:

SANTO CASILLI FCPA PFIIA

AUSTRALIAN  
AUDIT 

## INDEPENDENT AUDITOR'S REPORT

To the members of Umbrella Multicultural Community Care Services Incorporated Association

### Report on the Audit of the Financial Report

#### Opinion

We have audited the financial report of Umbrella Multicultural Community Care Services Incorporated Association (the Entity), which comprises the statement of financial position as at 30 June 2023, the statement of profit or loss and other comprehensive income, statement of changes in equity and statement of cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies and the statement by the Members of the Committee.

In our opinion the accompanying financial report has been prepared in accordance with requirements of the *Associations Incorporation Act 2015 (WA)* and Division 60 of the *Australian Charities and Not-for-Profits Commission Act 2012*, including:

- a) giving a true and fair view of the Entity's financial position as at 30 June 2023, and of its financial performance and its cash flows for the year then ended; and
- b) complying with Australian Accounting Standards to the extent described in Note 1, and Division 60 the *Australian Charities and Not-for-profits Commission Regulation 2013*.

#### Basis for Opinion

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Report* section of our report. We are independent of the Entity in accordance with the *Australian Charities and Not-for-profits Commission Act 2012 (ACNC Act)* and the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 *Code of Ethics for Professional Accountants* (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

#### Emphasis of Matter – Basis of Accounting

We draw attention to Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared to assist the Entity to meet the requirements of the *Associations Incorporation Act 2015 (WA)* and the *ACNC Act*. As a result, the financial report may not be suitable for another purpose. Our opinion is not modified in respect of this matter.

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### Responsibilities of Management and Those Charged with Governance for the Financial Report

Management is responsible for the preparation and fair presentation of the financial report and have determined that the basis of preparation described in Note 1 to the financial report is appropriate to meet the requirements of the *Associations Incorporation Act 2015 (WA)* and the *ACNC Act* and the needs of the members. The responsibility of Management also includes such internal control as management determines is necessary to enable the preparation and fair presentation of a financial report that is free from material misstatement, whether due to fraud or error.

In preparing the financial report, management is responsible for assessing the Entity's ability to continue as a going concern, disclosing, as applicable, matters relating to going concern and using the going concern basis of accounting unless management either intends to liquidate the Entity or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Entity's financial reporting process.

### Auditor's Responsibilities for the Audit of the Financial Report

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with the Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of this financial report.

As part of an audit in accordance with Australian Auditing Standards, we exercise professional judgment and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial report, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Entity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Entity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial report or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the





audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Entity to cease to continue as a going concern.

- Evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

#### Report on Other Legal and Regulatory Requirements

In our opinion, Umbrella Multicultural Community Care Services Incorporated Association has complied with 60-30(3)(b), (c) and (d) of the ACNC Act:

- by providing us with all information, explanation and assistance necessary for the conduct of the audit;
- by keeping financial records sufficient to enable a financial report to be prepared and audited; and
- by keeping other records required by Part 3-2 of the Act, including those records required by Section 50-5 that correctly record its operations, so as to enable any recognised assessment activity to be carried out in relation to the entity.

Yours faithfully,

**Viral Patel, CA, CPA**

Registered Company Auditor number 333615

**Director**

**Australian Audit**

**Dated: 11 September 2023**



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