

Southern Disability Advocacy Inc.

Thirty-Seventh Annual Report

2021-2022



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Southern Disability Advocacy Inc.

Agenda

Annual General Meeting
6.30pm Tuesday October 11, 2021

Online via videoconferencing

1. Welcome
2. Apologies
3. Confirm minutes of Annual General Meeting 2021
4. Matters arising from Minutes of the Annual General Meeting 2021
5. Receive Reports
6. Election of Committee of Management
7. General Business
8. Meeting Close

Minutes
36th Annual General Meeting
Southern Disability Advocacy
Tuesday October 12, 2021

Meeting Opened: 6.30pm

Present: Anat Green (Chairperson), Aisa Obarcanin, Sharon Bergman, Evan Lowenstein, Alan Bergman, Kerry McLinden (Staff and Minutes), Lisa Thomas (Staff)

Apologies: nil

Welcome: Anat welcomed those present to the meeting and thanked them for their attendance at this, our thirty-sixth Annual General Meeting

Minutes of the previous Annual General Meeting: Moved Sharon; Seconded Aisa.

Matters arising from the previous AGM: No matters arising.

Chairperson's Report

Anat presented her report, acknowledging her gratitude for the support she had received from staff and the Committee in her first year in the role. It has been an opportunity to observe more closely the work of staff in advocating for our client group, and to see the pressing need for people with disability to be able to access strong advocacy.

Moved Anat; Seconded Evan.

Treasurer's Report

Evan noted that the Program is in a strong financial position, with liquid funds of about \$330k including our investments with JB Were. With our grants for advocacy and the Disability Royal Commission, we are well placed for the coming year. He noted the audit has been done and referred those present to the statement from the Auditor in the Annual Report.

The Committee resolved to attach to these minutes the Confirmation of Annual Statement as True & Fair, signed by Evan & Anat.

Moved Evan; seconded Anat

Acceptance of Auditor's Report and appointment of 2021-22 Auditor

The Committee thanked Christopher Falkingham of Balance Corporation for this year's audit and resolved to appoint Balance Corporation as auditor for 2021-22.

Moved Evan; seconded Anat.

Program Report

Kerry spoke of the appreciation both she and Lisa feel towards the Committee the support provided, enabling staff to concentrate on the purpose of the Program, advocating for people with disability. Lisa spoke to the importance of advocating for individuals in an environment of power imbalances, and the need to support people to acquire skills to self-advocate.

The Program Report was accepted. Moved Sharon; Seconded Evan.

Election of Committee of Management and Delegation Authorities

All positions on the Committee were declared vacant.

Nominations for the Committee were received:

Member	Mover	Second
Anat Green	Alan Bergman	Lisa Thomas
Evan Lowenstein	Anat Green	Kerry McLinden
Sharon Bergman	Kerry McLinden	Anat Green
Aisa Obarcanin	Kerry McLinden	Lisa Thomas

The Committee were re-elected unopposed.

The Committee elected Anat as Chairperson unopposed.

The Committee re-elected Evan as Secretary and Treasurer, and confirmed his decision to delegate authority to deal with Consumer Affairs Victoria to Kerry McLinden.

The Committee resolved to delegate to Kerry McLinden the authority to deal with the Australian Charities and Not-for-Profits Commission, Australian Taxation Office and the Australian Business Register.

Chairperson: Anat Green. Secretary and Treasurer: Evan Lowenstein. Ordinary members of the Committee: Aisa Obarcanin and Sharon Bergman.

General Business

Alan described some of his experiences & learnings that have arisen from advocating for his daughter in the NDIS, & his use of legislative measures to hold the NDIA to account in supporting participants achieve their goals.

Meeting closed 6.59pm.

Submission of financial statements to annual general meeting –
incorporated associations

Associations Incorporation Reform Act 2012

Sections 94(3), 97(3) and 100(3)

I, Anat Green, being a member of the committee of Southern Disability Advocacy
Incorporated certify that –

“I attended the annual general meeting of Southern Disability Advocacy held on the
October 12, 2021 and the financial statements of the association for the financial
year ending on June 30, 2021 were submitted to the members of the association at
that general meeting.”

Signed:  _____

Date: 13-10-2021

**Extract from the Constitution of
Southern Disability Advocacy Inc
Statement of Purposes**

The name of the incorporated Association is **SOUTHERN DISABILITY ADVOCACY INCORPORATED.**

This incorporated association exists for the following purposes:

1. To provide an advocacy service for people with disabilities that represents and protects their rights and interests. To assist people with disabilities to overcome barriers, including abuse and neglect, that impact on their daily life and ability to participate in the community. To help people with disabilities access the freedoms, services and conditions enjoyed by other members of the community.
2. The Association intends to:
 - (1) facilitate, equity of access and participation in the community (for people with disabilities);
 - (2) educate people with disabilities about their rights;
 - (3) promote self-reliance amongst people with disabilities;
 - (4) provide a means through which the wishes and needs of people with disabilities are recognised by the rest of the community and are reflected in community structures and attitudes;
 - (5) provide orientation, resources and continuous support for people with disabilities;
 - (6) publicise the work and aims of Independent Advocacy and to develop interest in and support for those aims in the community at large;
 - (7) undertake community based education programs designed to promote public awareness of the issues faced by people with disabilities and to encourage public assistance with Independent Advocacy programs; and
 - (8) maintain appropriate links with other relevant organisations.

Southern Disability Advocacy Inc
Personnel & Support
2021-22

Committee of Management

Anat Green (Chair)

Evan Lowenstein (Treasurer)

Aisa Obarcanin

Sharon Bergman

Staff

Program Manager

Kerry McLinden

Advocate

Lisa Thomas

Bankers

Westpac

JB Were

468 Centre Rd

Melbourne

Bentleigh 3204

Auditor

Christopher Falkingham

Balance Corporation

PO Box 8502

Heatherton 3202

Primary Source of funds

Department of Social Services

Quality Assurance Auditors

SAI Global

Locked Bag 90

South Melbourne 3205

Chairperson's Report

It is my great pleasure to present the Chairperson's report for Southern Disability Advocacy for 2021-22.

It has been another year in which we have seen a constant demand for advocacy in the southern Melbourne metropolitan and Mornington Peninsula areas. We have seen at a local level that the risk of exploitation of people with disabilities is ever-present and requires timely and firm responses so as to minimise its prevalence and its impact. In addition, the risk of poor standards of service to people with disability and neglect of our client group is ever-present. Our work in relation to the Disability Royal Commission has highlighted people's experiences in this regard, likewise our work in advocating for individuals with disability has identified situations that should never be experienced by anyone.

We exist to advocate for people with disability across our catchment and to protect their rights and interests. This is a short sentence but it encompasses a lot, and as Chairperson I am witness to the work done by our staff. We see the continued growth in demand for advocacy year on year, and as an organisation we try to be agile and responsive. Our staff have been committed and energetic, offering quality advocacy in a dynamic environment, and I wish to offer my gratitude to Kerry and Lisa for their excellent work this year.

The Committee oversees the Program and provides support and guidance to the staff as they work with the clients. It is an honour to lead a group of skilled and committed people, who donate their time and expertise, in a governance and oversight role. I wish to offer a big thankyou to our Committee of Management for their ongoing support of staff and also their support to me as Chairperson.

I am looking forward to the year ahead and all it will offer in opportunities and challenges. We have stable staff team and Committee, and a solid financial position, and this gives me confidence that Southern Disability Advocacy is well positioned for 2022-23 and beyond.

Anat Green

Chairperson

Program Report

The preparation of the Annual Report gives me the opportunity to review the previous year and reflect on what we have done, and to look to the future. We have done a lot of work for individual clients, which is our core business as an advocacy provider. Most of our clients are seeking assistance with NDIS related issues, perhaps help to be accepted by the NDIS after having an application declined or in appealing a decision by the National Disability Insurance Agency, as the governing body of the NDIS. People will sometimes seek our assistance because their NDIS plan is providing the supports they need, perhaps due to poor service quality or poor communication. We also get requests for advocacy for people unrelated to NDIS, for example Centrelink matters, VCAT applications for Guardianship and/or Administration, but also where a person with disability is potentially be exploited or simply overlooked while others make decisions for or about them without.

The underlying theme for our work is to represent the rights and wishes for our clients: a common theme through many of our advocacy cases is that people with disability are experiencing less rights and freedoms than their peers without disability. Our role is to act for the client in a partisan manner, that is speaking with and for them, and being concerned with their fundamental needs and human rights. Sadly, even in 2022, these cannot be taken for granted for people with disability, and the role of an advocate is to be loyal and accountable to the client in resolving the issues of discrimination, abuse and neglect.

We take this role very seriously, as we often find that by the time people contact us they are exhausted and really struggling to resolve the issue of concern. In the past year we have worked with people who have encountered multiple barriers in their quest to achieve an ordinary life. In doing this work I am often struck by how often what they are seeking is a “bridge” to achieve the ordinary life, ie services or equipment or something else that would allow them to do the things that are considered ordinary for someone without a disability. Bathroom modifications, or getting good quality personal care or a funding for a speech therapist are all examples of the kinds of “bridges” we are asked about!

We have also been working with people to write submissions to the Royal Commission into Violence, Abuse, Neglect and Exploitation of People with Disability. Typically, these submissions are in a shared project between us and the client, as they tell their story. Without question their experiences are sobering and we strive to convey their full experience to the Royal Commission in the submissions, so the final report from the Commission will be informed by those stories. Ultimately, the Royal Commission should result in healing and greater protection for the rights, interests and wellbeing of people with disability.

We strive to be accessible and responsive, and as a small organisation, I like to think we do that well. As manager, I am greatly assisted in this by the support of the Committee of Management: the Committee provides guidance and expertise in the critical area of governance. This is invaluable, particularly where resources are so sparse. I offer my thanks to all of the Committee but in particular I would like to single out Anat Green as Chairperson and Evan Lowenstein as Treasurer, for the excellent support provided throughout the year as their contribution allows me to concentrate on operational matters. In addition, our Advocate Lisa Thomas shows unwavering commitment to the work and her advocacy work in representing clients is outstanding: again my thanks is owed to Lisa for her work.

The report below of our 2021-22 statistics summarises the work we have done over the last 12 months.

We look forward to 2022-23 and beyond optimism and energy, as we believe the Program is in a strong position, with stable personnel and a strong balance sheet.

Kerry McLinden

Program Manager

Local Government Area	Number of Clients
Bayside	12
Glen Eira	8
Kingston	10
Port Phillip	3
Stonnington	1
Other	1
Frankston	7
Mornington Peninsula	20
Total	62

Primary Disability	Number of clients
Acquired brain injury	7
Autism Spectrum Disorder	6
Intellectual Disability	20
Neurological disability	7
Physical Disability	5
Psychiatric Disability	14
Sensory/speech	2
Other	1
Total	62

Advocacy Issue	Number of Issues Addressed
NDIS implementing plan/accessing services	8
NDIS access/planning	18
NDIS internal review	4
Government payments	2
Disability services complaints	4
Community inclusion social/family	2
Access to non-NDIS services	1
Abuse/neglect	7
Accommodation	2
Discrimination or rights	2
Education	2
Finances/subsidies/entitlements	2
Health	1
Independent living	1
Legal	9
Services	2
Vulnerable/isolated	2
Other	1
Total	70

Southern Disability Advocacy As at 30 June 2022

30 Jun 2022 30 Jun 2021

Assets

	30 Jun 2022	30 Jun 2021
Bank		
Cash Reserve	218,716	159,659
Cheque Account	3,985	6,063
Gift Fund	10,625	9,553
JBWere Cash Trust	61,911	59,480
Total Bank	295,237	234,754
Current Assets		
JW Were Franking Credits	(5,941)	(3,348)
Trade Debtors	145	-
Total Current Assets	(5,796)	(3,348)
Fixed Assets		
JBWere Hybrid Securities	99,596	101,997
Total Fixed Assets	99,596	101,997
Non-current Assets		
Bond - Balcolme Road	3,026	3,026
Bond for facility hire	400	400
Less: Accum Deprec on P&Equip	(19,327)	(19,327)
Other Financial Assets	-	212
Plant and Equipment [17120]	19,327	19,327
Total Non-current Assets	3,426	3,638
Total Assets	392,462	337,040

Liabilities

Current Liabilities		
GST	(2,834)	(1,485)
Income Tax Refund	-	1,573
Provision - Annual Leave	31,712	44,904
Provision - Long Service Leave	47,769	45,547
Provision for Sick/Personal Leave	52,225	-
Rounding	-	-
SDA - Kerry McLinden Credit Ca	2,681	1,529
Trade Creditors	2,963	1,034
VISA Gift Card - Lisa	-	(94)
Total Current Liabilities	134,516	93,008
Non-Current Liabilities		
PAYG Withholding Payable	11,118	12,603
Provision - Bonus for K McLinden	10,000	13,000
Total Non-Current Liabilities	21,118	25,603
Total Liabilities	155,634	118,611

Balance Sheet

	30 Jun 2022	30 Jun 2021
Net Assets	236,828	218,429
Equity		
Current Year Earnings	20,800	59,158
Provision for Bonus	(10,000)	(10,000)
Retained Earnings	129,104	69,946
Retained Surplus/Accum Losses	96,924	99,325
Total Equity	236,828	218,429

Profit and Loss

Southern Disability Advocacy For the 12 months ended 30 June 2022

	Jun-22	Jun-21
Income		
COVID Grants & Subsidies	-	29,741
Direct advocacy NON FAHCSIA	-	788
Donations NON FAHCSIA	50	50
DRC Grant	130,000	87,311
Funds in Court	338	1,484
Grants (C'wealth) Operating	250,211	247,244
Interest Received FAHCSIA	2	30
Interest Received NON FAHCSIA	130	115
JBWere Dividends Received	2,358	2,380
Total Income	383,090	369,142
Gross Profit	383,090	369,142
Plus Other Income		
Solar Grant	-	12,500
Total Other Income	-	12,500
Less Operating Expenses		
Annual Leave Expense	(13,368)	15,373
Assets Purchased <\$5,000	-	900
Audit Fees	-	1,600
Bank Charges	87	125
Board/Governance Expenses	45	907
Bookkeeping Fees	2,408	1,174
Computer Expenses	3,712	7,774
Consultancy Fees	688	215
Credit Card Fees	3	3
DRC Expenses	19,138	19,874
DRC Grant - Wages Allocation	80,945	52,312
Employment Support & Supervisi	3,228	3,025
Fees and Permits	21	-
Foreign Currency Gains and Losses	43	36
Insurance - PL, PI & Volunteer	3,029	2,973
Interest Paid	-	1
Legal Expenses	-	2,700
Long Service Leave Expense	5,353	5,169
Memberships and Subscriptions	4,414	3,887
Postage, Freight and Courier	322	1,146
Printing and Stationery	1,247	1,375
Property Supplies & Services	597	10,326
Publications and Info Resource	477	496
QA General Expenses	2,891	3,441
Rates & Taxes	333	467
Rent	13,830	13,886

Profit and Loss

	Jun-22	Jun-21
Repairs & Maintenance	262	-
Salary and Wages - General	154,181	148,572
Sick Leave Expense	52,225	-
Staff & Clients' Amenities	679	721
Sundry Expenses	41	443
Superannuation	15,063	13,492
Telephone & Fax Charges	6,084	4,533
Training and Develop (Staff)	370	90
Travel Allowance - General	2,033	3,127
Travel and Accommodation	72	55
Utilities	66	-
Work Cover Levy	1,770	2,267
Total Operating Expenses	362,290	322,485
Net Profit	20,800	59,158



**BALANCE
CORPORATION
ACCOUNTANTS**
Numbers +

Independent audit report to the members of Southern Disability Advocacy Inc .

Scope:

We have audited the attached financial report comprising the Profit and Loss Statement and Balance Sheet, of Southern Disability Advocacy Inc. for the year ending **30 June 2022**. The Southern Disability Advocacy Inc.

Committee of Management is responsible for the financial report and have determined that the accounting policies used are consistent with the financial reporting requirements of the Southern Disability Advocacy Inc. constitution and are appropriate to meet the needs of the members. We have conducted an independent audit of the financial report in order to express an opinion on it to the members of Southern Disability Advocacy Inc. No opinion is expressed as to whether the accounting policies used are appropriate to the needs of the members.

The financial report has been prepared for distribution to members for the purpose of fulfilling the Committee of Management's financial reporting requirements under the Southern Disability Advocacy Inc.'s constitution. We disclaim any assumption of responsibility for any reliance on this report or on the financial report to which it relates to any person other than the members, or for any purpose other than that for which it was prepared.

Our audit has been conducted in accordance with Australian Auditing Standards. Our procedures included examination, on a test basis, of evidence supporting the amounts and other disclosures in the financial report and the evaluation of significant accounting estimates. These procedures have been undertaken to form an opinion whether, in all material respects, the financial report is presented fairly. (These policies do not require the application of all Accounting Standards and other mandatory professional reporting requirements in Australia).

The audit opinion expressed in this report has been formed on the above basis.

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Audit Opinion

In our opinion, the financial reports present fairly, in accordance with the Balance Sheet of Southern Disability Advocacy Inc. as at **30 June 2022** the Profit and Loss Statement for the period then ended.


Christopher Falkingham FCA & FCPA

28th September 2022

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