



2020/2021

ANNUAL REPORT



Our Vision

Acacia Living Group is the first preference for the provision of innovative and quality residential aged care, home care, respite care and independent retirement living options to the community.

Our Mission

As a registered charity, Acacia Living Group provides accessible options across the full continuum of care and housing for the aged in the community.

Our Values

Caring, Trust, Respect, Openness, Integrity, Fairness and Compassion.



CEO REPORT

I am pleased to present my report and the company's Annual Report for the year ended 30 June 2021.

The financial year was one of reflection and planning to ensure that the Acacia Living Group was able to continue to deliver services in what has become and will continue to become the most highly regulated industry.

Underpinning this was the Aged Care Reform Plan outlined by the Commonwealth Government which focused on:

- Home care
- Residential aged care services and sustainability
- Residential aged care quality and safety
- Workforce
- Governance

During this year the Board of Directors examined its future needs for its customers within the current organisational structure and its ability to meet all requirements of these reforms. Uppermost in its decision making was the need to provide both future financial and total care security for all our clients and our residents across the entire range of services.

With the needs of Residents and Community clients being paramount, especially in these challenging times, for all sectors in the aged care industry, but most particularly in the not-for-profit sector. The Board sought options to further secure the Acacia Living Group's presence not only in WA but nationally too.

Acacia Living Group assessed the options available to achieve the organisation's vision for the future and determine where its efforts were best directed to grow and strengthen support and services to the Acacia Living community. This reflective process resulted in the Board deciding to seek to merge with a similar organisation to further strengthen and grow support and services for the groups clients, residents and employees.

Part of this process was to ensure that it found a merger partner that was a like-minded charitable organisation that shared a similar history and shared objects. The option that was chosen by the Board was to commence discussions with the Bolton Clarke Group, an independent not-for-profit provider of comprehensive living, health and aged care services. These discussions commenced in the last quarter of this reporting period and the merger will be completed halfway through the financial year 2021/2022.



Linda Jackson
Acting Chief Executive Officer
Acacia Living Group Overview

974 residents and clients may receive our services at any one time:

- 265 or 27.2% Residential Aged Care residents;
- 440 or 45.2% Independent Living Unit residents;
- 249 or 25.6% Home Care clients (including private clients);
- 10 or 1% Veterans Home Care clients;
- 5 or 0.5% National Carer Respite Program (130 annually);
- 5 or 0.5% Respite Centre Clients, Jurien.

Acacia Living Group also provides **full management services** to a recognised charitable organisation, Wattle Hill Care Incorporated:

- 62 bed Residential Aged Care Facility; and
- 51 Independent Living Units.

564 people assist Acacia Living Group to achieve our charitable objectives:

- 509 or 90.2% are full time, part time, or casual employees (as at last pay period of FY 2020/2021);
- 55 or 9.8% are volunteers (includes Board members).

Who was helped by our charity in FY 2020/21?

Elderly women and men from the general community, people from diverse cultural and linguistic backgrounds, people at risk of homelessness, people with disabilities, people with chronic or terminal illness, people who are financially and/or socially disadvantaged, people who live in rural or remote locations, people from an Indigenous background, veterans and their dependents.

Resources and Operating Locations

Acacia Living Group operates the following services in Western Australia:

- Beachlands Retirement Village, Geraldton
- Jurien Bay Retirement Village
- Coral Estate Retirement Village, Mandurah
- Mandurah Retirement Village
- Menora Gardens Retirement Village
- Pearson Retirement Village, Menora
- Jacaranda Gardens Retirement Village, Canning Vale
- Meadow Springs Residential Care Facility
- Menora Gardens Residential Care Facility
- Geraldton Home Care Services
- Jurien Bay Home Care Services
- Mandurah Home Care Services
- Perth Metropolitan Home Care Services
- South West Rural Home Care Services
- Turquoise Coast Respite Centre, Jurien
- Geraldton National Carer Respite Program
- Geraldton Budget Accommodation

- Veterans Home Care Services (Mid-West)
- Veterans Community Nursing Services (Wheatbelt, Southwest, Midwest, Perth Metro)
- Wattle Hill Care Bunbury (Residential Care Facility and Retirement Village – Management Services)

Employee Recognition

Award ceremonies are held annually to recognise significant service milestones, successful completion of training courses and to acknowledge the valuable contribution of our employees and volunteers.



Australia Day Award Ceremony 2021

(L-R) Sharmaine Garde (Facility Manager – Menora Gardens Aged Care); Leonard Fong (IT Support Officer – Corporate Office); Alisha Lewis (Administration Assistant – Geraldton)

Acacia Living Group Chairman, Mr Kevin Campbell AM, presented National Australia Day Council Achievement Medallions and Certificates to members of staff during an award ceremony on Friday 22nd January 2021.

Recipients were awarded Australia Day Council Medallions and Certificates in recognition of their sustained outstanding service to residents of Residential Care Facilities, recipients of Home Care services and to their colleagues.

The National Australia Day Council Achievement Medallion and Certificate provide the Acacia Living Group Board and senior management team with an opportunity to acknowledge and recognise outstanding individual and team contributions in the lead up to Australia Day.

Corporate Reporting Obligations

Acacia Living Group makes every endeavour to remain compliant with the legislative requirements of, but not limited to, the Aged Care Act 1997 (Cth), Aged Care (Accommodation Payment Security) Act 2006, Retirement Village Act 1992 (WA), Retirement Villages Regulations 1992, Fair Trading (Retirement Villages Code) Regulations 2015 (WA), Land Administration Act 1997 (WA), Associations Incorporation Act 1987, Australian Charities and Not-for-Profits Commission (Consequential and Transitional) Act 2012, Corporations Act 2001 (Cth), Goods and Services Tax 1999 (Cth), Fringe Benefits Tax Assessment Act 1986 (Cth), Superannuation Guarantee (Administration) Act 1992 (Cth), Income Tax Assessment Act 1997 (Cth), Fair Work Act 2009 (Cth), The Personal Property Securities Act 2009 (Cth), Workplace Gender Equity Act 2012, Privacy Act 1988 (Cth), Food Act 2008, Guardianship and Administration Act 1990 (WA), Occupational Safety and Health Act 1984 (WA), and the Veterans' Home Care and Veterans' Community Nursing Services Guidelines (Department of Veterans' Affairs).

Acknowledgements

We acknowledge and thank Lotterywest for their ongoing financial support of Acacia Living Group initiatives that ensure the best possible care and support for our aged clients and those in necessitous circumstances. Similarly, Programme Maintenance Services ongoing support of the Menora Gardens and Pearson Village 90's Club is greatly appreciated by our residents and their families. In the same way, the generous employee incentive programs offered by Harvey Norman Cannington Superstore and HBF Health Insurance are also highly valued by our team. Thank you to Lotterywest, Programme Maintenance Services, Harvey Norman Cannington, and HBF Health insurance for their ongoing support during challenging commercial environments.



Financial Summary 2020/2021

These figures are an extract of the audited annual accounts which have been produced in accordance with the Australian Accounting Standards.

	2020-2021 \$000's	2019-2020 \$000's
REVENUE		
Subsidies	25,226	21,641
Fees	10,353	9,694
Other Income	5,968	3,565
	<u>41,547</u>	<u>34,900</u>
EXPENDITURE		
Employment	24,056	21,624
Other	11,555	10,265
Depreciation	1,978	1,836
	<u>37,589</u>	<u>33,725</u>
PROFIT/(LOSS) FROM ORDINARY ACTIVITIES	3,958	1,175
FAIR VALUE (LOSS)/GAIN ON INVESTMENT PROPERTY	(617)	(6,207)
PROFIT FOR THE YEAR	<u>3,341</u>	<u>(5,032)</u>
ASSETS		
Cash and cash equivalents	25,509	8,968
Property, Plant & Equipment	39,432	40,383
Investment Property	139,268	143,463
Other	1,539	2,723
TOTAL ASSETS	<u>205,748</u>	<u>195,537</u>
LIABILITIES		
Payables	3,724	2,428
Provisions	2,705	2,921
Bonds/RADs & Resident Refundable Bonds	164,520	157,753
Borrowings	25,471	26,380
Other	536	604
TOTAL LIABILITIES	<u>196,956</u>	<u>190,086</u>
NET ASSETS	<u>8,792</u>	<u>5,451</u>

Acacia Living Group Board Members

Chairman
Mr Kevin Campbell AM

Deputy Chairman
The Hon Robert Kucera APM, JP

Director
Mr Geoff Martin

Director
Ms Rae Freeman JP
(resigned December 2020)

Director
Ms Cinzia Donald

Director
Mr Graham Reynolds OAM

Chief Executive Officer
Mr Kevin Davidson MVO, OAM
(resigned 1 July 2021)



Jurien Bay



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