2025

### Balwyn Evergreen Centre Promoting Independence and Wellbeing

# ANNUAL REVIEW

Balwyn Evergreen Centre



# Balwyn Evergreen Centre Annual Review 2025

### Balwyn Evergreen Centre Ltd.

45 Talbot Ave, Balwyn 3103 ABN: 94 907 516 455 03 9836 9681 / office@balwynevergreen.org.au www.balwynevergreen.org.au

### **OUR VISION**

A community where members have choice, wellbeing and independence.

### **OUR MISSION**

To foster a community of friendship, health, wellbeing and independence.

#### **OUR VALUES**

Integrity: We operate with integrity in everything we do

Compassion: Our approach is always with compassion and empathy

Accountability: We are accountable to our consumers, funders, regulators and the broader community

Respect: We treat people with dignity and respect in a caring manner

Excellence: We strive for excellence in everything we do

### **OUR FOUNDERS**

We respect our history of 65-plus years of service and continue to be inspired by the dedication of our founders, who identified a need in the community to provide care and support for older people experiencing social isolation.

In 1958, the Evergreen Club was established, and in 1966, we formally became the Balwyn Welfare Association. In 2012, we changed our name to Balwyn Evergreen Centre in recognition of our history, environment, and continued focus on providing social support programs and facilities for older people in and around the Boroondara Community.

### ACKNOWLEDGEMENT OF COUNTRY

Balwyn Evergreen Centre acknowledges the Wurundjeri people who are the Traditional Custodians of the land on which we work and their connections to land, sea and community.

We pay our respects to their Elders, past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples.



### **Board Chair and Chief Executive Report**

### Rodney Harris, Board Chair, and Tina Hogarth-Clarke, Chief Executive Officer

On behalf of the Board of Balwyn Evergreen Centre, it gives us great pleasure to present the Annual Report for the year ending June 30, 2025. Balwyn Evergreen's primary purpose is to provide and promote facilities, services and programs that actively support older people in improving their physical, social and emotional wellbeing, and enable them to continue to live independently in their community. Management, staff, volunteers and the Board can be proud of their contributions during the past year, which have enabled Balwyn Evergreen to continue to deliver its primary purpose. And what a year it has been.

The Aged Care Act draft has been an ongoing focus, as the Government seeks to shape the service needs and response for older Australians' need for assistance to remain living at home or in a residential service setting.

The challenges of creating a new Act have been complicated by the regular changes and advocacy from aged care organisations and providers as they try to ensure that the new approach actually focuses on people's needs.

While the Act has now been finalised in respect to Support at Home and Residential Care, there is an ongoing discussion about the Commonwealth Home Support Program (CHSP), under which Balwyn Evergreen are significantly funded and which guides our service model.

With a target date of July 1, 2027, for phasing out CHSP and the transition to Support at Home changes, the coming years will be challenging. Boroondara City Council gave our centre a new, refreshed, modern look. The disruptions and paint smell were worth it as we now have a fabulous venue to welcome older people.

As an agent of the Aged Care Volunteer Visitor Scheme, we have reaped numerous rewards, finishing the year with 88 older people being matched with a volunteer visitor and receiving regular visits to combat social isolation.

Our volunteer program has expanded and includes driving, supporting exercise programs, weekly baking and cooking.

The latter provides freshly made snacks and meals for clients attending all our programs.

We installed a coffee machine, purchased new furniture and opened our Evergreen Connections Cafe and Information Hub and look forward to the official launch early in the 2025-26 year.

We have undertaken a review of all our programs in light of the new Aged Care Act, framework and model.

To ensure continuity of services and an easy transition into the new model for staff, volunteers and clients, we remain diligent in assessing information readiness for changes that require implementation.

2025-26 will see changes to our information technology systems to improve efficiency in operations as client numbers grow.

There will be changes to staff skillsets to ensure we have the right workforce and skills to deliver services under the new Act, and focus on the needs of our community.

Balwyn Evergreen provides a range of programs, activities and events to promote social connection and engagement. These include the Supported Lifestyle Program, weekly outings, exercise classes, community visitors, allied health and dog walkers, and engaging more than 100 volunteers across all programs.

These programs mitigate the social isolation and loneliness commonly experienced by many older Australians.

They enable people to connect with others, improve their independence, participate in a variety of interesting activities, and provide a sense of purpose and enhanced wellbeing.

Consumer feedback highlights our strengths in providing services that address quality of life through social interaction while improving physical and emotional wellbeing.

Feedback also underpins our improvement processes as we strive to be better and more responsive to client needs.

Clients continue to be our measuring stick and our reason for being.

### Governance

The Board and management of Balwyn Evergreen are committed to ensuring Balwyn Evergreen operates and maintains the high standard of corporate governance expected of a modern community-focused, not-for-profit organisation.

The skills-based Board comprises volunteer directors elected by and from the members. To support effective informed governance, the board has grown to nine (9) directors. With the Chief Executive Officer, they bring a range of skills, knowledge and experience required to govern the organisation and fulfil its compliance and governance responsibilities. The Board has delegated specific authority to four Board Committees to assist the Board with targeted responsibilities.

#### The committees are:

- · Finance & Risk
- Strategic Planning
- · Marketing & Communications, and
- 18 Talbot Ave Property

The Finance & Risk Committee reviewed the 2024-2025 Budget, audited financial statements and Portfolio Investment performance, and managed all risk and compliance matters before adoption by the Board.

The Strategic Planning Committee continues to monitor the Aged Care Reforms and their impact on Balwyn Evergreen. In particular, they examine our capacity to operate a sustainable operating model under the Support at Home provisions and the cessation of the Community Support at Home model, which is targeted to end on 30 June 2027.

A new strategic plan will be developed by staff, management and the Board in consultation with clients, funders and government to reflect the changing strategy in aged care presented by the new Aged Care Act.

The Marketing & Communications Committee work closely with Balwyn Evergreen's marketing team and CEO to continue to strengthen our brand and recognition within the community, and develop new, exciting activities for our clients.

The 18 Talbot Ave Committee provide oversight of our eight residential units, and guide the maintenance program of them. They also provide the Board with guidance regarding the future of the property.



### **Board**

In 2024, we farewelled our former Chair Raghu Nadathur, and thanked him for his leadership and dedication.

We also farewelled Marilyn Poole, our longest-serving board director. While she no longer serves on the board, Marilyn remains a big part of our community, and we are grateful for her enduring interest in our continued success.

As the year closed, Melrick Dias retired as a director and chair of the marketing and communications committee.

In February 2025, we welcomed three new board directors, Anthony Nicholls, Ashok Reddy Pothireddy, and Andy Chappell, who bring much-needed skills in property management, aged care, fundraising, and not-for-profit business.



Raghu Nadathur Chairperson (until Nov 2024)



Rodney Harris OAM
Chairperson



**Dr Marilyn Pool**Board Member (retired)



Seshan Ramaswamy

Board Member



Joanne Zhou Board Member



Melrick Dias
Board Member (retired)



Rowan Darling Chair Finance & Risk



Anthony Nicholls

Board Member



Andy Chappell
Board Member



Ashok Reddy Pothireddy

Board Member

# Our Focus on Service Delivery

Social Support Group (SSG)

### **Exercise Programs**

Our exercise programs have seen remarkable growth, promoting health and wellbeing among people over 65 in Boroondara and surrounding areas. We proudly offer one of the largest and most diverse selections of exercise programs, tailored to the unique needs and preferences of our community.

We explore new opportunities for expansion following the recruitment of a qualified Exercise Scientist, ensuring we continue to meet the evolving interests of our residents and enrich their active lifestyles.

As we move forward, we will grow participation in all our sessions.

We are committed to increasing options to enhance choice, variety and opportunity for our clients. Client feedback is invaluable to underpin our development, and we encourage our community to share ideas for new sessions or workshops they would like to see.

#### **The Senior Divas**

The Divas program aims to create a supportive environment for women to share experiences and build friendships. The group continues to grow with attendees engaging with a diverse list of guest speakers, some cooking sessions and themed discussions, to enhance engagement.

Clients gain a strong sense of belonging and shared support through this program.

### **Evergreen Ramblers - Tuesday Bus Outings**

Our Ramblers bus outings provide opportunities to explore places of interest, engage with the community, and foster social connections.

They enjoy a weekly excursion to parks, museums, the beach, markets, pubs, exhibitions and more.

This year, we saw an increase in popularity with referrals through word of mouth and from other service providers.

We now have waiting lists for many of our outings, with clients booking well in advance. Ramblers report that outings improve their mood and sense of community through the friendships and connections made on these trips.

If demand continues to grow, we will consider a second day for rambling.



# Our Focus on Service Delivery

### Social Support Group (\$SG)

### **Friday Supported Lifestyle Program**

This is a tailored program for clients with some cognitive impairment or mild dementia, focused on their specific needs, and providing activities that promote physical, social and mental wellbeing, as well as safety in the home.

The program includes a gentle armchair exercise class with a qualified instructor, a three-course lunch, and a variety of activities that deliver an inclusive environment and support memory and cognitive function. It plays a vital role in enhancing the quality of life by fostering social connections and supporting independence.

The demand for a day program tailored for older people living at home with cognitive decline has increased as older people are staying at home with support for longer.

The program supports carers of the older person by giving them a weekly break, and many family members report improvements in mood after their loved one attends.

A part of our review of our programs and structure has been on ensuring a dementia friendly and inclusive environment. One staff member was appointed as our Dementia Lead. They have gained qualifications from Dementia Australia to ensure we create and maintain a dementia inclusive environment across all our programs. In 2025-26, this program will be expanded to run over two days.

#### **Wednesday Luncheon and Entertainment**

The Balwyn Evergreen Community Club officially wound up in December 2023.

As Balwyn Evergreen has hosted this group since its inception, we continue its legacy and include its Wednesday Luncheon as a part of our regular programs. Throughout the year, attendees enjoyed home-cooked meals prepared by our volunteer cook and musical concerts by a variety of performers. This program did not grow as expected during the year, as the attending client needs changed significantly - the demand for a social lunch has declined. The program will be reviewed in early 2025-26 to ensure it remains relevant to the needs of our community.



#### **Volunteers**

The Volunteer Coordinator has ensured responsive recruitment and training of skilled volunteers into roles as programs have evolved over time.

One of the new volunteer-led priorities this year was to improve our meal offerings and fully utilise our commercial kitchen. We now have a team of volunteer bakers who each week prepare tasty snacks for our clients to enjoy after exercise, and cooks who prepare homemade fresh meals for our Wednesday luncheon, Thursday Senior Divas and Friday Supported Lifestyle Program.

# Our Focus on Service Delivery

### Social Support Individual (SSI)

Changes to the approved support at home service list in January 2025 increased our offerings under this program and included the Evergreen Connections program and digital support.

#### **Evergreen Connections**

Evergreen Connections was expanded to provide a volunteer link to clients experiencing social isolation, but who were not eligible for the Aged Care Volunteer Visitors Scheme. Regular visits from a volunteer reduce loneliness and isolation and enhance opportunities for engagement with other programs.

#### **Transport Services**

Balwyn Evergreen's local transport service is vital in getting clients to and from their activities. Our minivans and car are consistently more dependable than taxis and ensure frailer clients can access our programs with safety. As our programs grow and the demand for this service increases, we have partnered with other community transport organisations to extend availability.

#### **Digital Support**

This free service offers tailored support to utilise digital technology, such as phones and tablets, to enhance communication with family and friends, and support independence.

Provided in small groups, one-to-one or at home, this program has been very successful.

Demand has steadily increased, and additional funding has been sought from the Good Things Foundation Be Connected fund.

Changes to the aged care Support at Home service list, combined with a decline in the demand for dog walking, have helped us expand this program.

Participants feel much more confident in using technology to support their connection to friends and family, and support their independence.

### **Dog Walking**

In 2024-25 year, we saw a decline in referrals into this program as well as pets leaving us. A full review of this program in light of the changes to the Aged Care Act and Support at Home Services will be conducted in July 2025.

### **Evergreen Connections - Age Care Volunteer Visitor Scheme (ACVVS)**

The last 12 months have witnessed remarkable growth within the Evergreen Connections Program. This is part of the aged care volunteer visitor scheme, highlighting its positive impact on both recipients and volunteers. We had 88 placements during the year.

Recipients have shared heartfelt testimonials about how the program has enriched their lives, made them feel happier and less lonely. Simultaneously, volunteers express a deep sense of fulfilment from their involvement, finding joy in the connections they've fostered.

This mutual benefit not only strengthens the community but also reinforces the program's vital role in promoting emotional well-being and companionship.

Service Delivery Attendance	2025	2024	2023	2022	2021
Social Support Activities	1451	3236	2951	1180	1001
Exercise Programs	7021	7345	6889	4402	2732
Transport Services	2558	2674	2511	1660	1115
Total Attendance	11030	12874	11780	7242	4848

### Financial Report

Balwyn Evergreen incurred an operating loss of \$151,689 for the 2024-2025 year, before including fair value movement on financial assets held (higher operating losses by \$80,266 compared to the 2024-2025 year). After including fair value movement on financial investments disposed of and financial assets held, the total comprehensive deficit for the year was \$86,724.

Revenue was down overall due to a reduction in funding mid-year in the ACVVS program, and although we saw growth in attendance in many of our programs, it was not adequate to cover a price reduction in exercise. Operation costs continue to increase, with the main contributors being award wage increases and the increase in the superannuation guarantee rate.

Monthly performance reporting against budget allowed us to closely monitor our financial performance and develop countermeasures as appropriate to meet budget commitments.

REVENUE (\$)	2025	2024	2023
Fee Based Income	325,748	302,067	303,403
Grants	570,045	577,042	362,605
Venue Hire & Property Rental	162,169	179,663	175,304
BEC Membership Fees	0	0	6,970
Dividends & Interest	101,435	102,320	108,560
Other Income	1,415	9,510	1,294
Donations & Bequests	5,607	23,960	45,954
Total Revenue	1,166,420	1,194,563	1,004,090

EXPENDITURE (\$)	2025	2024	2023
Employee Costs	954,931	959,443	813,151
Depreciation	12,720	15,558	21,399
Occupancy Costs	62,702	52,821	60,466
Other Expenses	90,961	82,766	72,919
Administration Costs	196,794	155,398	150,140
Total Expenditure	1,318,108	1,265,986	1,118,075

PROFIT & LOSS SUMMARY (\$)	2025	2024	2023
Revenue from Operating Activities	1,166,420	1,194,563	1,004,090
Total Expenditure	1,318,108	1,265,986	1,118,075
Profit [Loss] for the year	[151,689]	[71,423]	[113,985]
Profit [Loss] on disposal of financial	11,941	0	[11,479]
investments			
Fair value movements on financial assets	53,024	126,750	69,324
Total Comprehensive Income [Loss] for year	[86,724]	55,327	[56,140]

The detailed financial results for Balwyn Evergreen are contained in the audited financial statements, which are available from the office and on our website.

### Staff

The commitment and contribution of the Balwyn Evergreen team consistently delivered quality programs and services to consumers in a welcoming and caring manner.

The 2024-25 year saw no staff changes.

Our volunteer workforce has continued to grow, mainly contributing to the Evergreen Connections program, but also growing our baking and meal preparation program and drivers.

We congratulate all staff, instructors and volunteers for their valued efforts and achievements during the year.



Tina Hogarth-Clarke



**Kerri Jackson**Volunteer Coordinator



Raymond Kolesnikoff
Exercise & Compliance
Coordinator



**Bo Cui** Operations Lead



Lotana Motuku Social Support Individual Coordinator



Elise Walle Social Support Group Coordinator



Lucia Agati
Lifestyle, ACVVS
& Marketing Support



Erica Fosbender

Marketing & Communications
Coordinator



Brittany Walle
Administration Officer



Natalie Dunphy Administration Officer



Leonie Legge CHSP Assistant



Theresa Bernstein Accounts Manager

### Aged Care Act

The new Aged Care Act 2024 will commence on November 1, 2025. The rights-based act provides the regulatory framework for the funding and regulation of aged care services. Over the last year, as information and guidance around how we will operate under the new act was made available, we have conducted reviews of our programs to ensure they align with the new support at home service list. This will ensure our clients continue to receive the benefits of our services and that we transition to the new Act and model seamlessly.

We continue to develop systems and processes to improve our assessment and planning for our clients' needs and to ensure our governance and risk management systems are integrated and continuously improving our service delivery.

Even where we are doing well, we can always do better. Our focus in 2025-2026 will be to strive for excellence by looking for ways we can expand and improve our service offering, increase client attendance, maintain good governance and meet and exceed the compliance obligations of the Aged Care Act.

# Marketing and Communications

The Marketing Plan continues to generate interest, appeal, and participation in activities and services at Balwyn Evergreen, and is working to retain existing and generate new clients.

Overseen by our Marketing and Communications Coordinator, our Marketing Plan has been implemented, and our promotional and branding activities continue to result in media opportunities and an overall increase in awareness of our centre.



Our marketing activity has had a dual focus of promoting the diverse range of programs on offer at Balwyn Evergreen, along with the promotion of the Aged Care Volunteer Visitor Scheme (ACVVS), to attract both volunteers and older people experiencing social isolation to form productive and meaningful friendships.

#### **Annual Consumer Survey**

The 2025 Survey will be conducted in November 2025 and is an opportunity for our community to provide valuable feedback on our programs and centre as a whole.

The results from the 2024 survey, which we closed in December 2024, revealed both positive and constructive feedback, which gave us a deeper understanding of our programs and services. We continue to be extremely grateful to our valued clients who take the time to provide feedback and want to see us succeed.

Highlights from the 2024 survey showed that the main reason for clients attending Balwyn Evergreen was to look after their health (75%), and the main benefit was to socialise with others (75%).

### Balwyn Evergreen Open Day 2025

Our second Open Day, held in March 2025, was another huge success and a celebration of our community. We showcased our sponsors, supporters, venue hire partners and programs, as well as providing an avenue to raise funds to support our High Tea held every year in October. The next Open Day is planned for March 21, 2026.

### Outlook for 2026

Balwyn Evergreen has been proactively reviewing our existing business model, including services being provided and assessing sustainability under the proposed new Support at Home program and operating environment.

The 2025-2026 Balwyn Evergreen Budget contains investment in branding and marketing to grow the number of older people accessing our services and increase participation levels across all programs and client categories during the implementation of the Aged Care Reforms.

The Board continues to evaluate strategies for Balwyn Evergreen that ensure short-term and longer-term sustainability while responding to the needs of its community in an environment of constant change. A review of staff skills and experience to implement the Aged Care Reforms and continue to expand our service offering is underway, and a restructure is expected early in the 2025-26 year. The outlook for 2026 and beyond is positive, as sustainable growth

The outlook for 2026 and beyond is positive, as sustainable growth regardless of the operating environment remains our key aim.



# The Strategic Plan 2026-2030

This year we continued to deliver on the strategic plan developed for 2024-2027. The plan provided a framework that enabled us to respond to opportunities that will present changes in the aged care system while maintaining high service provision for our clients. We have set ourselves six strategic goals that will support us as we work towards our vision, mission and purpose:

- 1 Older people in our community maintain and improve social and emotional health through the provision of activities that prevent social isolation and loneliness
- 2 Older people in our community will remain independent and healthy through the provision of activities that support physical and emotional strength and wellbeing, and choice
- 3 Systems and processes allow for agility and ease in our transition to Support at Home Program and we remain a sustainable and cost-effective provider of quality service within our community
- 4 Through partnerships and innovation, Balwyn Evergreen will remain relevant and viable in a changing environment
- 5 We enable our people to grow and thrive
- 6 We are ready to transition to the new aged care model

Early in the 2025-26 year after we fully understand the changes in aged care act that will impact our business we will conduct a strategic review and develop a new plan.

### Thank You to our Volunteers

Balwyn Evergreen was founded by a group of volunteers more than 65 years ago, who came together with a drive to establish support services for older people in the Balwyn community.

Today, this spirit of giving back and reaching out to support those who are most in need continues to inspire more than 100 volunteers from a variety of backgrounds.

They generously give their time and energy to support our consumers by driving our buses, lending a hand in social support, exercise classes, Evergreen Club activities, meal preparation, walking dogs, and serving on committees and the board. Thank you to all our volunteers - you embody the giving, caring spirit of Balwyn Evergreen, and we will always value and appreciate all that you do for us.



# Join us in Partnership

We would like to thank everyone who gives their time and resources to support the work we do. Here are some of the ways people choose to support Balwyn Evergreen.

**VOLUNTEERING:** See above

**BEQUEST:** An easy and meaningful way people choose to support the work of Balwyn Evergreen is by leaving a legacy in their will.

**IN MEMORY:** Family and friends often choose to remember their loved ones who have enjoyed the caring services of Balwyn Evergreen staff by giving a gift that contributes to continuing our services.

**RELATIONSHIPS:** Our relationships with Bendigo Bank and local small businesses are vital to the continued work of Balwyn Evergreen, and we continue to seek additional relationships in the community.

**BALWYN EVERGREEN CENTRE USER GROUPS:** The team at Balwyn Evergreen has built partnerships with local community groups to ensure programs are delivered that improve the wellbeing of our consumers and make the best use of the Balwyn Evergreen facilities.

Venue Hire partners include: Boroondara Chinese Senior Citizens, Friendship and Wellbeing Association [Mandarin], Taiwanese Association of Australia Melbourne Chapter, Bahai Community Boroondara, BAPS Group, Melbourne Revival Fellowship, Hong Kong Club Tai Chi Group, Balwyn Table Tennis Club, Melbourne Meditation Group, Wendy Samantha Productions and Ignite Dancing Performance Art. The user groups generate over 24,000 attendances per annum.

**SPONSORS AND SUPPORTERS:** We sincerely thank all our sponsors and supporters who have ensured the successful running of our Centre.

Sponsors and supporters include: Bennet's Butchery, Bread Street, Camberwell Camera Club, Candles by Amy, Elevate Physiotherapy, FoodFilled, Fruit Nest Balwyn, Joyce Optometrists, Tan's Greenhouse,

The Y – Boroondara Leisure and Aquatic Facilities and VicProp Boroondara.

A special mention to the Balwyn Evergreen community for supporting our events and answering the call for donations of goods for raffles.

# City of Boroondara

We acknowledge and thank the City of Boroondara for maintaining our first-class facilities and the surrounding environment.

Thank you to Cr Jane Addis, Maling Ward Councillor, The City of Boroondara, for her interest in and continued support of Balwyn Evergreen.

We were grateful to have such an engaged and interested representative. We welcomed the new Maling Ward Councillor Shima Ibuki, late in 2024 and are pleased that she continues the support and interest in our Centre.

### Balwyn Historical Society Annual Report 2025

For the year ending June 2025, we held two events, which enabled us to fundraise more than \$2600.

**Antiques Roadshow** – people had items valued, the Aveo Group paying all expenses, attended by about 100 people.

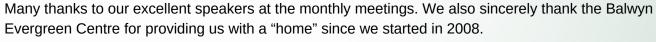
**Georges Remembered** – featuring 1950 hits, models in a fashion parade wearing 1950s clothes and accessories, sponsored by 10 local businesses, including Aveo Group and Travelrite, attended by 120 people.

We also commenced the following projects:

**Storytelling** by people who lived, worked, went to school or played sport in Balwyn – of the twenty storytellers, six had their stories recorded.

**History Walks** from Parring Road to May Street – the first walk took place with 20 U3A Deepdene members, and more walks are planned next year.

**Balwyn History Talk** – initially presented to U3A using the stories gathered.



In the next year, we plan to become incorporated, which will provide funding opportunities to continue our existing projects and commence new ones.



Matthew Etty-Leal President BHS

Matthew Etty-Leal