



ANNUAL REPORT 2024

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About Montagu

Montagu Community Living (Montagu) is a community based, for-purpose organisation established in 1990. We exist to provide person-centred supports for people living with disability that will:

- enable people to progress their individual goals
- promote and develop independence, self-confidence, and connectedness
- facilitate active participation in community activities
- encourage people to exercise maximum control over their own lives.



Josh preparing tea



Bec on her way to see the Pinocchio show



Nicolle on her birthday



Nicolle, Mark, Paul & Bec attending Cracker Night

The people we support are at the centre of everything we do and every decision we make.

We believe in:

A fair and inclusive society where Human Rights are respected and upheld, participation is encouraged and supported, and lifelong learning leads to improved outcomes, independence, connectedness, and resilience.

Our Vision:

To be the most trusted provider of support services to people living with disability in Tasmania.

Our Mission:

To deliver outstanding support services that exceed the expectations of people living with disability in Tasmania.

Montagu Core Values

Our values guide every action we take and every decision we make. They are the essential framework on which we base our work practice, behaviour, communication and interactions with the people who choose to receive services from Montagu, our colleagues and all stakeholders. Our core values are:

Respect

We value the uniqueness of every individual.
We treat people, their situation, and their choices,
fairly, honestly and compassionately.

Commitment

We do what we say we will do, stand up for
what we believe in, and see things through.

Quality

We provide services that exceed expectations.

Accountability

We always act in the best interests of the person choosing to
receive services through Montagu and are accountable to them.

Responsibility

We are responsible for performing our duties
to the best of our ability.

Connection

We pride ourselves in knowing our service users,
their families and friends and our employees.

Integrity

We exercise honesty, transparency and sincerity
in all that we say and all that we do.



Emma, Stuart and Mathew

Chair's Message

It is my privilege to present my third report as Chair of the Board of Montagu Community Living. 2024 has been a year of remarkable growth, change, and unwavering commitment to our mission of supporting individuals living with disability to live independent and fulfilling lives.



Judi Reid
CHAIR

2024 has been a year of ongoing acknowledgement for Montagu and our processes. Reflection and self-assessment during, and following the findings of, the Disability Royal Commission has demonstrated to me that Montagu's dedication to transparency, accountability and best practice in the sector, reaffirms our standing as a leader in the field and a trusted partner to our clients and their families.

We also received wonderful feedback and an excellent report as a result of the independent audit of our services against NDIS Standards. I appreciate and wish to acknowledge the wonderful work and ethics of the staff reporting and liaising with the auditors. The Auditors consider Governance as one of the areas which reflect significantly on the performance of the organisation and this year focussed on actions and decisions made by the Board's Risk Committee.

The opening of our sixth and seventh share homes in Clarendon Vale and New Norfolk represented not just an expansion of our physical presence, but also a deepening of our commitment to providing high-quality, supportive living environments for those we serve. Unfortunately, the Board had to make the difficult decision to close the share-home at New Norfolk at the end of the financial year due to the lack of clients wishing to utilise this accommodation option.

The audited Financial Report included in this Annual Report reflects the increasing challenges facing Management and the broader disability sector. The recent NDIS review, along with the commitment of the Commonwealth Government to contain the cost of the NDIS, present an uncertain and potentially more complex future. The Board is concerned that the delivery of high-quality, individualised services may be compromised due to legal and political changes happening within the NDIS.

This year has also seen further changes in our Board composition. In July 2024 the Board sadly farewelled Kimberley Martin, whose expertise and commitment as a Board Member and Chairperson will be greatly missed, I wish to thank her for her dedication and passion.

I wish to welcome our two additions to the Board during 2023/24. Mark Crosswell joined the Board in September 2023, taking on the role of Treasurer, and Joseph Collidge joined the Board in June 2024. Mark and Joe bring governance experience, relevant qualifications, and a commitment to excellence to their roles on the Board, along with, enthusiasm, to become part of our organisation. With the recruitment of our newest Directors, there has been an infusion of perspectives and ideas that has already begun to bear fruit, driving forward our strategic goals with renewed energy and vision. I am confident that this board will continue to uphold and advance the standards of excellence that Montagu is known for. I wish to state my great appreciation my fellow Board members who have extremely busy and demanding lives and yet are able to find time to



Paul B at the local library

Chair's Message continued

serve on our Board in a voluntary capacity. Thanks to all Directors for your time, your expertise, and your commitment. It is extremely valuable to Montagu and much appreciated.

Although the challenges of COVID-19 persisted into 2024, we had successfully adapted our operations to continue delivering high-quality care in this new environment. The virus, though less virulent, always remains a concern, as do other communicable diseases, and we have ongoing training and awareness programs to prepare for any potential future outbreaks. These measures have not only safeguarded the health and well-being of our community but have also provided a sense of security and preparedness that is invaluable.

At the heart of Montagu's success is our culture which is built on the foundation of our organisational values of respect, commitment, quality, accountability, connection, and integrity. These values are more than just words; they are the principles that guide every decision we make and every service we provide. The current board is deeply committed to nurturing this culture and building upon the achievements of our predecessors. It is this shared attitude and dedication that truly defines Montagu.

As we look forward to 2025 and beyond, I am filled with optimism for what lies ahead. We will continue to explore new opportunities for growth, driven by our unwavering commitment to assisting the choices of the people we support. The road ahead will undoubtedly bring its challenges, but I am confident that with the support of our exceptional team, dedicated board, and committed stakeholders, we will continue to achieve great things.

I would like to express my deepest gratitude to our CEO, Russ Penman, our staff, board members, and the broader Montagu community. Your hard work, dedication, and passion are the driving forces behind our success. I also want to acknowledge the ongoing support from our partners, clients, and their families. Together, I hope we are making a meaningful and positive difference in the lives of many.

I wish to acknowledge work and support of Cora Dean who was one of the founders of Montagu Community Living back in 1990. Cora passed away in August 2024 but leaves a legacy of dedication, wisdom, and vision.

Finally, thanks to all of you for your continued trust and support to me as Chair and Board member. I look forward to the opportunities that the coming year will bring, and to continuing this journey together.

Sincerely,

Judi Reid

CHAIR



Cassie at the Autumn Festival, New Norfolk

CEO Report



Russell Penman
CHIEF EXECUTIVE
OFFICER

I may have tempted fate in my 2023 report by deciding to reserve the label “chaotic” for the 2024 report!

2023/24 has certainly been a challenging year. The final report of the Royal Commission into abuse, neglect, exploitation was released in September 2023 and included 222 recommendations. While Montagu Community Living was not required to appear before the commission, we kept a close eye on proceedings and shared the sadness of so many stories of abuse, neglect, and exploitation. In particular, the reports regarding organisational failure to address complaints and reports of abuse/neglect were shocking and caused me to question just how far we have really come since the days of large institutional services. Our management team often discussed these stories and considered the way that our organisation would have responded to the various scenarios. While we are not, and never will be, perfect, it was satisfying to verify that our systems, processes, and values underpin our actions in ensuring that client rights are upheld and supported. In addition to the Royal Commission, the Commonwealth Government announced a review of the NDIS to “get it back on track”. Reports of rampant fraud, exploitation of NDIS Participants, and some of the examples of how NDIS funding has been used, certainly warrant a review of the Scheme. The final report of the Review was released in December 2023 and contained 26 recommendations and 139 actions. Much of the report is dedicated to improving collaboration between the Commonwealth and States/Territories to create what they call a “unified ecosystem” in which the NDIS is seen as just one part of a system that supports people living with disability.

The Commonwealth has committed to achieving significant reductions in the cost of the scheme and the establishment of new sets of rules that will commit states and territories to doing more to support people living with disability. While there is still much work to be done in this space, we have already seen funding in many NDIS plans reduced with little or no explanation, and a new mantra from the Agency that “the plan is the plan, and the budget is the budget” – which essentially means that the Agency is in no mood to negotiate. The Agency has advised Participants that if providers will not provide the required supports within the budget, then they should find a provider who will. This has led to some people questioning how this approach fits with client “Choice and Control” that has been a mainstay of the Scheme to date.

The changes already put in place and the uncertainty of more changes in the pipeline has certainly unsettled the Disability Sector. Organisations are now focussing on being flexible and adaptable, planning only 1-2 years ahead, and monitoring financial performance more closely. It is likely that more mergers/takeovers will happen in the next few years as the cost of doing business increases.

As you will see from the enclosed financial reports, for the first time in several years, Montagu made a loss in 2023/24. This is primarily due to our inability to attract sufficient clients to the share-homes opened in Clarendon Vale and New Norfolk. Both properties had capacity for 6 tenants, but occupancy averaged less than 50% across these two houses despite our best efforts.



Mark celebrating his birthday

Like many providers, we had not anticipated the decision by the NDIA to see share-homes as an option of last resort. This resulted in a marked decrease in the number of NDIS Participants with funding for Supported Independent Living in their plans. Many providers are reporting financial losses in 2023/24.

In response to the loss made in 2023/24, the Montagu Board made the difficult decision to close the New Norfolk House by the end of June 2024. There were only two people living in the New Norfolk House by June, both of whom took the opportunity to move into the Clarendon Vale House, which is now at full capacity.

Despite this financial loss, 2023/24 contained many highlights which you will find in the enclosed reports.

The outcome of the independent audit against NDIS Service Standards was right at the top of our achievements over the year, with zero non-conformities identified and glowing feedback from the audit team. The auditors were impressed with every member of the Montagu team that they met, including those receiving supports and their families. Comments from the auditors included a recognition of the commitment and knowledge of Support Workers, the personalised services provided to clients, and the openness to feedback across the organisation.

A second major highlight came from the results of our external survey of the Montagu workforce. Previous results had shown a high level of engagement with the aims of Montagu and a wide appreciation for the ways that we manage our employees. The results for 2023/24 were almost off the chart with staff describing Montagu as the best employer they have ever had, thanking Montagu for understanding them as a person and not only as an employee, and referring their friends working in the sector to Montagu.

As you will see from the Client Services report, many clients had the opportunity to try new things, develop new skills, broaden their horizons. While audit and survey results indicate that we are doing a lot of things right, it's always the impact on the lives of the people we support that is most important to all of us. On behalf of the Management Team, I welcome all new clients and thank those who have chosen to continue to receive supports through Montagu for their ongoing



Paul on his way to new accommodation



Bec on her birthday

loyalty and confidence in our organisation.

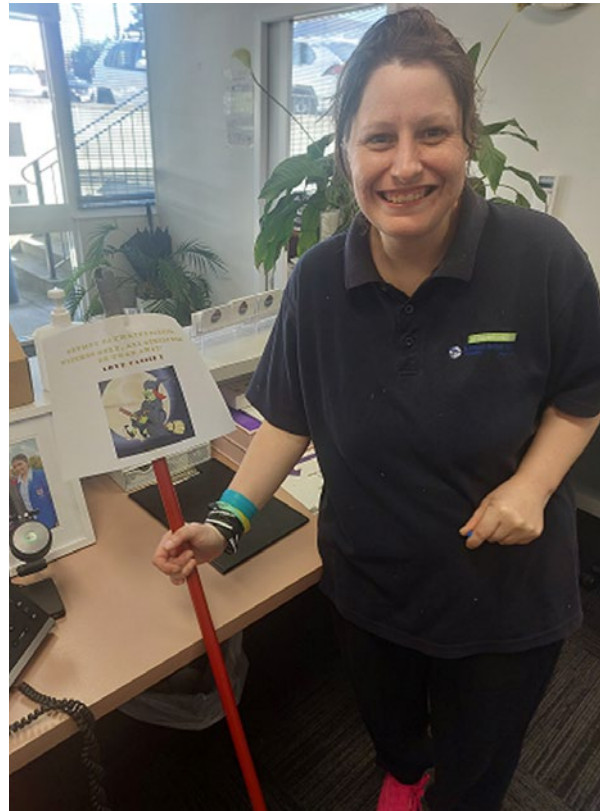
We are very fortunate to have such a highly skilled and dedicated workforce who share our commitment to client outcomes. The Employee Experience report emphasises our personal approach to managing our employees and the well-established partnerships we have with training organisations that enables us to continue building the skills of our workers. Every year we welcome new staff to the organisation and say farewell to others who move on to new challenges. This year we farewelled Elon Watt (Manager Community Supports Program), and his young family as they moved to the mainland.

The Montagu Board had some changes of membership during the year. I'd like to thank Kimberley Martin for her support and guidance during her 6 years on the Board and wish her and her young family great joy in the coming years. I'd also like to thank Judi Reid for her support as Chair of the Board throughout the past year, and welcome Mark Crosswell to the Board. Our Board members continue to lead and serve the organisation on a voluntary basis, and we are grateful for their ongoing contribution to Montagu.

Despite the chaotic nature of the past year, I believe we can continue to look to the future with confidence. The Montagu Board has helped to guide us through the challenges we have faced in 2023/24 and remain committed to our quest for excellence in all that we do. The Management Team has worked tirelessly to improve our systems and processes to support our staff to deliver great support services. And we continue to benefit from the loyalty of the people we support as well as our employees. Together we will continue to build on the legacy of Montagu as a provider of high-quality personalised support services, and an employer of choice.

Russell Penman

CHIEF EXECUTIVE OFFICER



Cassie playing tricks on "Grumpy Cathryn" while she was away from reception.



James at the gym

Excellence & Standards Report

What a full-on year that was !!!!



Rita Sharma
MANAGER
EXCELLENCE &
STANDARDS

My role as the Manager of Excellence, and Standards is always challenging, sometimes exhausting, and daunting, but never boring!

While we were gearing up for the upcoming Re-Certification Audit as a Disability service provider, the publication of the Royal Commission's report last year, required Jess and I to be abreast of many mandatory requirements, changes, and practice alerts in the disability sector.

I attended many webinars, meetings, and workshops to educate myself to evaluate, review, and analyse Montagu's current processes to effectively demonstrate that we are maintaining our commitment to being excellent in everything we do, and have robust

continuous improvement processes in place.

I also completed further training to develop a full understanding of the latest quality standards, held meetings with senior Montagu staff to entail and discuss with them what was required of us as an organisation to meet these standards, developed policies, procedures, and tools to enable support staff to demonstrate how Montagu meets or exceeds the NDIS quality standards.

We also revised the Montagu Code of Conduct and Child Safety Code of Conduct.

Jessica and I completed thorough internal audits focussing on WH&S, Fire safety, Administration of Medications, Risk Assessments for everyone we support, and Individual Emergency Evacuation and Disaster Management Plans, to ensure continuity of services during future emergency/disaster situations.



We engaged the Office of the Senior Practitioner for an update on Restrictive practices. We visited all SIL properties and worked with support teams to identify any restrictive practices and then reported back to the Manager, Client Services, Eve. She effectively developed protocols and obtained authorisations from the Office of the Senior Practitioner for the use of essential restrictive practices.

As an organisation we are very diligent in reporting to the NDIS Commission any use of restrictive practices.

In the lead-up to the June audit against NDIS Service Standards, the external auditors advised that they would examine the Client Risk assessments and our

Risk framework, Incident management and Complaints management processes, continuous improvement projects we have in place, and reviewed our relevant documentation.

As an organisation committed to excellence, we welcome these external audits and see them as an opportunity to identify gaps and develop projects for future improvements.

The feedback provided by the auditors at the end of their 3-day assessment of our organisation against the NDIS quality standards was very encouraging. The lead auditor commented on how refreshing it was to meet staff who genuinely embraced the audit process as an opportunity to identify areas for further improvement rather than trying to cover up any areas of concern.

The auditors were full of praise for the work we had put into having effective systems and policies in place, as well as the internal audits that we conducted regularly. The auditors concluded by saying that they had conducted around 2,500 audits and that Montagu would easily be in the top 10% of organisations they had audited.

The auditors acknowledged the management team for their insight and commitment to Montagu and noted how effectively the business was operating.

The written report produced by the auditors was equally impressive. The audit report verified that audit

Excellence & Standards Report continued



objectives had been achieved and concluded that Montagu fulfilled the requirements of the practice standards with no non-conformities.

I can very proudly say that “Success is the sum of small efforts, repeated day in and day out.”

We are now even more determined to continue our quest to become excellent in everything we do.

Our vision is not to be the biggest provider in Tassie, but we certainly want to be the best!

Along with our focus on quality and service standards, the Excellence team also plays a lead role in the management of risks. We believe that “The biggest risk is not taking any risk. In a world that’s changing quickly, the only strategy that is guaranteed to fail is not taking risks.”

We continue to work with an external specialist organisation, Wyandra, to better manage risks. We are now using their software to understand risk management principles and processes to integrate risk management practices with other processes, such as quality improvement and business planning. Montagu’s Risk statement highlighting the Risk Appetite is high on Montagu Board’s agenda and is a core consideration of the risk management framework.

Our Covid and emergency and pandemic response Task Force continues to remain vigilant to the risks of further waves of the pandemic in Tasmania and will continue to actively safeguard the health and safety of the people we support and the people we employ.

Montagu is growing and we are aware of the challenges that come with growth, but with challenges come opportunities and we certainly do not want to miss out on them. We prioritise people over profits and outcomes over a corporate image.

We will always continue to strive for excellence and provide the highest possible quality support services we can, and I love being able to play a leading role in it.

Finally, but most importantly Team Excellence would like to wholeheartedly acknowledge and thank our CEO Russ for his continuous mentoring and unconditional support, the support and commitment of our colleagues across the management team, and appreciate and thank all support staff for their service and continued dedication to Montagu and the people we support.

Rita Sharma

MANAGER EXCELLENCE & STANDARDS



Guess which team Peter follows?

Client Services Report



Eve Forster
MANAGER,
CLIENT SERVICES

Financial year 2023/2024 has been another fun and eventful year for Client Services starting with my appointment as the new Accommodation Manager on the 5th of July quickly followed by the official opening of the New Norfolk Share-home on the 6th of July.

The New Norfolk property had a slow start, we had a lot of interest from potential tenants early in the piece but once the doors were ready to open, it appeared that the people that had enquired previously had either already sourced alternate accommodation or were not provided with Supported Independent Living (SIL) funding in their plans.

In an attempt to get the New Norfolk House up and running, we sent out flyers to Support Coordinators and Local Area Coordinators, and letter box dropped every house in the New Norfolk and Brighton municipalities. After 10 months of effort, and with only 3 Clients living in the 6-person New Norfolk House, we had to reassess the sustainability of the New Norfolk House and ultimately made the difficult decision to recommend closure to the Montagu Board.

Two of the three Clients who were residing at the New Norfolk property, have since moved into Montagu's Clarendon Vale property and settled in beautifully. This has now brought Clarendon Vale property to be at full capacity with 5 tenants. The third person who was living in the New Norfolk property gained skills during those 10 months to be able to live more independently and moved into a more appropriate support setting to suit his needs.

We also saw another person move into Claremont house early in the financial year. Curtis is a lovely man who is very wise, quiet, and witty and has settled in well with the existing tenants. This has brought the Claremont house to full capacity.

In addition, July saw Community Support Program welcome Stephanie Wiggins as part time Assistant Manager as well as part time Payroll and Projects officer. Stephanie came to Montagu from Li-Ve Tasmania where she worked heavily in the admin and client service spaces as well as dabbling in payroll, so she brought a wealth of experience to this role.

In September Montagu farewelled former Community Support Program Manager Elon Watt. Elon moved to sunny Queensland with his young family. Elon's sudden departure gave Russ and the Board an opportunity to review the way in which Montagu's supports were managed and this resulted in the Accommodation Team and the Community Supports Team amalgamating to become the Client Services Team.

This decision enabled us to expand the team of assistant managers to be in a better position to be proactive with the requirements of the NDIA, better support the dedicated support workers and Team Leaders and take some pressure off the existing Assistant Managers. This saw Kimberley Green and Allison Harris as successful candidates



Emma leaving the office with a smile after hunting for spiders and other creepy crawlies.

in these positions bringing the Assistant Manager team four.

This has been a very successful restructure and we are now in a much better position, leading the Client Services team successfully and proactively as well as collectively having more knowledge with support easily accessible.

There have been multiple Team Leader changes these past 12 months too, regrettably we farewelled Lisa Shepherd who was Team Leader at Claremont. Lisa was a happy-go-lucky lady and always had a smile on her face. I felt so lucky to have got to work closely with Lisa for the short time our paths crossed. With every change however is an opportunity and Lisa's position was advertised on an acting fixed term contract and we were incredibly lucky to interview so many strong candidates. Ultimately Michael Harris was successful in his application. Michael had worked at Claremont house previously and this made for a smooth transition for not only Michael but the Clients and Support Workers of Claremont house. Chloe Gleeson was successful in her application for acting Team Leader at New Norfolk. Just as closure of New Norfolk was approaching, Alison Goodsell resigned from her position as Team Leader at Lenah Valley. This gave Chloe an opportunity to apply for the Team Leader position at Lenah Valley which she was successful in.

Changes don't stop there, there have also been some Key Worker (KW) moves. Samone Triffett and Jacqueline Cannell were successful in their applications for Key Worker positions at Clarendon Vale in September, Irene McClurg resigned from KW position at Claremont and Nick McKay moved from Lenah Valley to Claremont to backfill the position that Irene left vacant. In June, Tania Browning was successful in her KW application for Lenah Valley house bringing many years of experience with her. Jacqui Cannell recently resigned from her KW position at Clarendon Vale to take on another career opportunity elsewhere, however she is remaining with Montagu on a casual basis. Zona Wu was recently successful in her application for Key Worker at Clarendon Vale and is already doing really great things. Clinton Morely resigned from his Key Worker position late last year at Sorell to become DSW across multiple teams and Yin Nie was successful in his application for the vacant Key Worker at Sorell.

Montagu has been fortunate with the high-quality support workers who have applied and successfully gained employment in support work the past 12 months. We are thankful for the quality of applicants who have applied for a position and now providing true person-centred supports to people.

Montagu is truly dedicated to providing high-quality person-centred disability supports to people around the Hobart area and to continue to be successful in this, we are dedicated in maintaining the quality of employees who are our greatest asset. I would also like to mention here, that Montagu has hosted several student placements from various training organisations over the past 12 month and a number of these students have since been successful in obtaining paid work with Montagu.

Montagu support workers are of a high standard, and it is a great opportunity for students to have the opportunity to see what best practice looks like outside of the classroom.

Now we (hopefully) have the worst of COVID behind us, we are seeing people travel more. We are now seeing employees taking longer periods of leave which has enabled other employees an opportunity to act in different positions to cover colleagues leave. This is a great opportunity for staff to upskill and "try before you buy". The interest that has come forward from staff who want to have a taste of another role is incredible and we are fortunate to have such a passionate team of employees with such a diverse background and varying skillsets.

With the borders well and truly open and the decline in COVID, we have been supporting more people on interstate holidays again, it has been great being able to support people to reconnect with interstate family, go to watch their favourite AFL team play, or go on shopping trips interstate.

Another positive thing I have noticed more recently is the office is starting to become abuzz with visitors.

Client Services Report continued

We love having people we support popping in for a visit, along with their family members, support staff, or friends. So please, if you are in the area, feel free to come and say hello.

I love nothing more than a good celebration, especially if it involves cake. While there is no cake here, I would like you to join me in celebrating the following achievements and positive support stories that have recently been sent to me.

"For years staff have been prompting Jarrod to take his dishes to the sink and to pick up from the table himself. Staff would have to pass the dishes to Jarrod. A few months ago Jarrod actually picked up the plate and cup himself and will also now take the plate or bowl to sink just with prompts no need for staff to pass them to him"
- Nick McKay

"At Lenah Valley the Clients like BBQs. Clients are hands on with cooking the BBQ. It's very social, with Clients enjoying time outside whilst food is cooking. Staff have supported Clients to organise BBQs with tenants of other Montagu House's and their families. The BBQ action is limited this time of year but daylight saving is only around the corner." - Kevin Jacques

"This year has brought some very exciting accomplishments for Maddy, since she moved into supported accommodation. Maddy makes friends wherever she goes, there is always fun and laughter when Maddy visits her house-mates. Maddy has a great rapport with everyone. Maddy has been going to St Giles for water therapy and has taken it all in her stride. With her patience and determination to accomplish goals, Maddy will have a big smile on her face while she does it!"
- Jacqui Cannell



MasterChef Leon returning home from a cooking class at his local community centre.



Craig is trying out his new wheelchair for size with his support workers Bishnu and Abasido. – Cindy Pepper



Donald has learnt to expand his cooking ability since moving into supported independent living with Montagu. – Rose Riley

Client Services Report continued



Stuart has been doing an exercise program that he very much enjoys at Zap Fitness. Stuart's goal is to gradually improve his flexibility and lose a bit of weight while enjoying a healthier lifestyle. – Scott Perkins



“Josh attended New Norfolk Red, White and Black Ball at the Elwick Racecourse where he enjoyed the Night with the New Norfolk Football Team with support worker Denise” – Mick Harris



Luke visited Melbourne where he enjoyed the Zoo and footy at the MCG – Scott Perkins

This year has been full of all kinds of fun in the Client Services space. We have seen a lot of change and it is heart-warming to see everyone come together and support each other through these changes, particularly for those people who find it challenging.

In the words of Ted Lasso “Taking on a challenge is a lot like riding a horse, isn't it? If you're comfortable while you are doing it, you're probably doing it wrong”.

I am so proud of the team I am in but not only for how resilient, supportive and dedicated each employee is, but for the growth each person has shown the past 12 months. I am really looking forward to reporting on more success stories next year.

Eve Forster

MANAGER, CLIENT SERVICES

Employee Experience and Culture Report

I am pleased to present the Employee Experience and Culture report for the financial year 2023/2024.

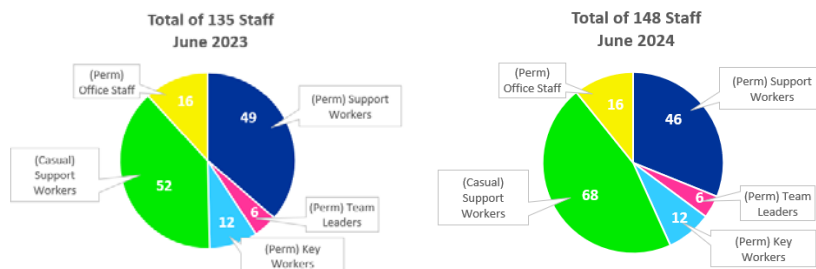


Bec Eldridge
MANAGER,
EMPLOYEE
EXPERIENCE
& CULTURE

This financial year provided a rare opportunity to refine and develop processes in the Employee Experience space, particularly those around the onboarding of new employees which was done in collaboration with the Admin Team. Previously, Employee Experience held responsibility for the initial office induction of new employees before handing them over to the Admin Team to have buddy shifts arranged. Now, new employees remain with the Employee Experience team throughout their induction and buddy shift stages. Once fully integrated to the teams they will work on, the Employee Experience team then transitions the new employee through to the Admin Team for ongoing rostering and shift cover. This change has resulted in a more supportive and streamlined experience for the employee and has significantly reduced the amount of

time taken to have that employee fully onboarded and ready to work.

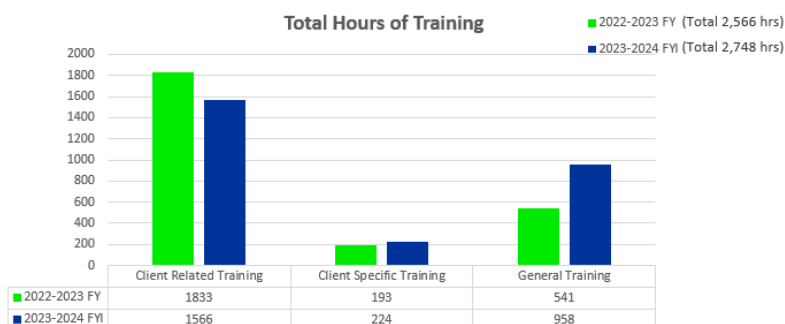
Our recruitment needs for Support Workers remains high, with 44 new employees welcomed to the organisation this financial year, 42 of whom were Support Workers – the same number as last year. Taking into account the number of employees who left the organisation, the following graphs depict our growth over the last two financial years.



Looking at other demographics;



Part of our commitment to excellence is ensuring our workforce are appropriately trained and confident in their roles - promoting strong employee engagement and wellbeing and high-quality services to clients.



As seen in the graph above there has been a significant increase in the number of hours of general training provided in this financial year. This is largely due to the roll-out of two new training packages:

- Fire Safety training was reinstated after a brief hiatus. Now considered annual training rather than the

Employee Experience and Culture Report continued

previous 3-year reaccreditation benchmark – the implementation of this training was a considerable undertaking towards the end of last year

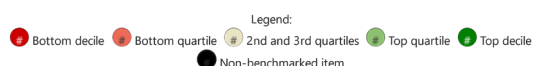
- We also collaborated with Medecs Learning to develop a 2 – hour Professional Boundaries training package to further support our workforce in their roles ensuring a thorough understanding of this integral aspect of our work. The roll out of this package commenced in October last year, and to date nearly all existing staff have attended, with positive feedback.

Our student placement program continues to run smoothly, with Montagu supporting the work placements of ten students from various Registered Training Organisations undertaking their Cert III in Individual Support , three of whom went onto to become Montagu employees.

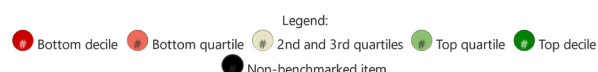
I would like to finish with some snapshots on the outstanding results of our Staff Satisfaction Survey conducted in February of this year compared with those of the previous survey in December 2022 (as referenced in my report last year). We engaged the services of Insync again in a partnership that has continued to provide Montagu with in-depth data on the culture and engagement of our workforce.

Engagement in the survey was again high with 71% of staff completing the survey – and the results speak for themselves:

Item	2022	Shift →	2024
I understand how my role contributes to Montagu's long term goals and strategies	95%	-5%	91%
Montagu cares about and is committed to me	69%	+9%	78%
Montagu is committed to high standards of performance	88%	+3%	91%
My skills and talents are used to their full potential	72%	+6%	77%
Our Senior Management Team has a vision for Montagu that inspires me	76%	-1%	75%
The person I report to is genuinely interested in my job satisfaction	83%	+2%	85%



Item	2022	Shift →	2024
I am proud to be working here	88%	+1%	89%
I believe that my own success is important to the success of Montagu	89%	+1%	90%
I happily do extra work to help Montagu succeed	88%	+2%	90%
I have a strong sense of belonging to Montagu	77%	+6%	83%
I would recommend Montagu as a workplace to my family and friends	85%	+4%	90%
Overall, I am satisfied with my job	75%	+9%	84%



Item	2022	Shift →	2024
All employees always act in the best interests of the people we support and Montagu	66%	+5%	71%
I can trust Montagu to do what they say they will do	76%	+4%	80%
Montagu strives for excellence in everything we do	81%	+9%	90%
Montagu values the uniqueness of every individual	81%	+7%	88%
We achieve high standards, and are responsible for performing duties to the best of our abilities	90%	-1%	89%
We remain accountable to people we support, their family members, each other and the organisation	91%	-2%	89%
We take pride in knowing the people we support, their families and friends and our employees	86%	-1%	86%

Our relationships with the organisations we partner with continue to strengthen - it is wonderful to be able to build such positive working relationships that enrich the experience that our employees have with Montagu and the wider sector. I would like to take the opportunity to thank:

- Deb Stone and her team at Medecs Learning
- Carla Watson and her team at Watson and Blanch Consulting
- Lorette Langford of Lorette Langford Consulting

Employee Experience and Culture Report *continued*

- Stephen Shaw and his team at Complete Fire Safety
- Kath Wright from Work and Training
- Utpal Sarker from Foresite Training
- The team at TasTAFE
- The team at iinduct
- The team at Insync

A huge thanks to all my colleagues for another great year, particularly to my partner in crime within Team Employee Experience – Chloe Clark, for all her hard work and support over the last year. We are certainly looking forward to what the coming year may bring.

Bec Eldridge

MANAGER, EMPLOYEE EXPERIENCE & CULTURE



Bec, Nicolle and cast members from Pinocchio

Governance Statement

Montagu Community Living Inc. is incorporated under the Associations Incorporation Act and operates under the rules of association adopted by the members in November 2005, amended in 2011 and 2018. Ultimate responsibility for the governance of the organisation rests with the Board of Directors. This governance statement outlines how the Board discharges that responsibility. The Board's primary role is to ensure that Montagu achieves its objectives.

The board must ensure that these objectives are achieved in the most efficient and effective way. The Board, which comprises of the Chair, Vice-Chair, Public Officer, Treasurer, and up to eight ordinary members, is elected each year at the Annual General Meeting. The role of a Board Director is undertaken on a voluntary basis. The Board meets at least six times per year and fulfils its primary role by:

- ✓ Selecting, appointing, guiding and monitoring the performance of the Chief Executive Officer (CEO)
- ✓ Ensuring Montagu complies with relevant legislation, regulations, and contractual obligations
- ✓ Formulating and endorsing Montagu's strategic plan
- ✓ Monitoring progress against the strategic plan
- ✓ Approving the operating and capital budgets and monitoring performance against these
- ✓ Development of a risk statement, endorsement of the risk management plan, and evaluation of performance against this plan
- ✓ Ensuring the integrity of internal controls
- ✓ Ensuring stakeholders receive regular reports
- ✓ Acting as an advocate for Montagu whenever and wherever necessary
- ✓ The Board has formally delegated responsibility for Montagu's day to day operations and administration to the CEO.



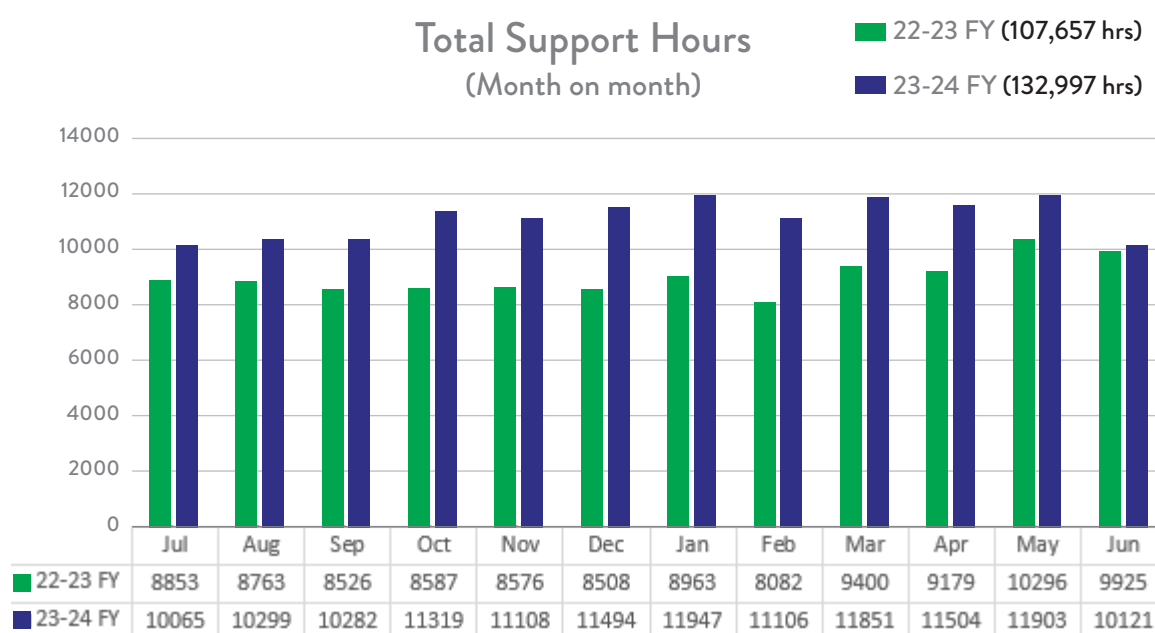
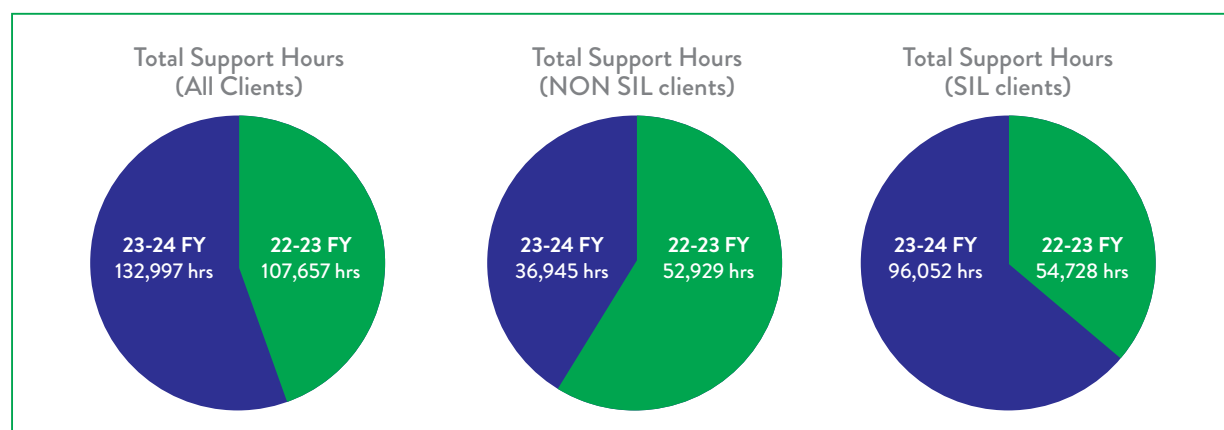
Administration Report

A new financial year is a great opportunity to reflect on our accomplishments, challenges and opportunities for the year ahead, and for the Administration Team the 2023-2024 FY has certainly been full of all of the above!

Since June 2023, the administration team have undergone a sizable restructure with the introduction of claiming and payroll functions, and my appointment as Administration Manager. This growth in admin has opened up more opportunities for the team to expand their transferable skills, providing stronger support and coverage when faced with unexpected leave or unforeseen circumstances. We have been and no doubt will continue to be busy for some time refining roles, planning and implementing process and system improvements. For those who know or have heard of me, it is no secret I am a big fan of whiteboards, and passionate about the benefits of a strong process and a good brainstorming session!

The admin team has made a lot of progress over the last year in the rostering space, as we navigated our way through the new Enterprise Agreement (EA), and the changes and challenges that this has presented. In addition, we have taken the opportunity to review staff availability, and develop base rosters that offer staff more regularity in their rosters which ultimately benefits clients, who, like most of us, like consistent staffing.

The start of the financial year saw interesting and challenging times in the claiming space while Montagu, along with other Tasmanian disability providers, adapted to the testing phase of the National Disability Insurance Agency's new Customer Relationship Management (CRM) system 'PACE'.



Administration Report continued

In addition, 2023-2024 has seen the phase out of funding for “irregular supports” and a noticeable difference in funding in some NDIS plans, as the Agency seeks to control costs.

To manage these changes, we have placed a strong importance on reviewing current processes and implementing improvements in claiming to best manage and track clients’ use of their funding. We have developed a Service Estimate Cost tool that enables us to compare SIL client funding against rostered supports. This will help us to identify any leakage and prevent over-servicing.

I’d like to acknowledge not only the wonderful work performed by Ben, Cathryn, Samantha, and Steph every day, but also their friendship, support, and ongoing commitment to Montagu.

With many more brainstorming sessions on the horizon, it excites me to see what this amazing team will achieve in 2024/25 as we continue to strive for excellence – **watch this space!**

Samone Walsh (Sam)

ADMINISTRATION MANAGER



Peter tending the garden

Board of Directors

Information on Directors as at 30/06/2023

Judi Reid

CHAIR & DIRECTOR

Judi and her family are founding members of Montagu. She has a Bachelor of Education and a Graduate Diploma in Environmental Management. Judi has previously run several Child Care Centres, enjoys getting away to the family shack, and has recently returned to quilting. She joined the Board in October 2018 and along with her extensive knowledge of Montagu, brings her passion for people and the environment to the role of Chair. Judi has been Chair of the Board for the past three years.

Kimberley Martin

DIRECTOR

Kimberley Martin B.A. LL.B. (Hons), LL.M, TEP is an estate planning, tax and trusts lawyer, and partner at WMM Lawyers in Hobart. Kimberley has a state, national and international presence in her field. In 2017, Kimberley completed her Master of Applied Law in Wills & Estates and was awarded dux of her class. She was awarded the Young Practitioner of the Year Award at the 2018 Global STEP Private Client Awards.

Kimberley has a strong involvement in the wider community. In addition to her role as Director of Montagu, she regularly presents to community and professional groups. She volunteers her time mentoring high school and university students and is the Secretary of the Tasmanian Committee of Women Chiefs of Enterprise International. She is a member of an international steering committee for issues surrounding digital assets (including what happens to your online assets when you die).

Sarah Davidson

DIRECTOR & DEPUTY CHAIR

Sarah joined the Board in September 2020 with experience as a Board Member, strong leadership skills, a history of supporting not-for-profit organisations in Tasmania, and success in leading innovative projects. Sarah possesses a broad range of skills developed while working in State and Commonwealth public service roles, business enterprise, and not-for-profit organisations.

Demonstrating a strong commitment to good governance, strategic planning, project management, and the importance of organisational culture, Sarah has taken a lead in risk management processes and strategic planning.

Zsuzsa Kollo

DIRECTOR

Montagu has been a part of Zsuzsa's life for over 25 years, since Montagu started to support her son who is living with disability. She has seen Montagu change and grow over the years from small beginnings, to become a successful and respected Tasmanian service provider. Zsuzsa trained as a visual artist, first in her home city of Budapest, and later here in Tasmania. She exhibits her work regularly in various galleries and used to run an art school for children in Hobart for several years. She now offers art classes at her studio in Dodges Ferry. Zsuzsa joined the board in 2021.

Phil Mollineaux

DIRECTOR & TREASURER

Phil joined the Montagu Board as Director in 2021 and is the parent of a person currently receiving supports by Montagu. Graduating from UTAS and Tas Advanced College of Education in 1973.

He is a retired teacher of Physical Education and Outdoor Education after 40 years with the State Education Department. Phil brings extensive governance experience to the Montagu Board having been a founding member of Community Based Support, and a past board member of Cerebral Palsy Tasmania.

Byron Nicol

DIRECTOR & PUBLIC OFFICER

Byron has been a Montagu Board Member since 1992, having served various terms in the position of Chair. Byron is a parent of a person receiving supports through Montagu. He is a retired teacher and administrator. Byron is also a Board member of VCES (Veterans' Children Education Scheme) including three terms as Chair; President and Treasurer of the Gemmological Association of Australia (GAA) (Tasmanian Division); a past Federal Director and Federal Treasurer of the GAA; and a member of Lions for almost 40 years. Byron is a recipient of the Melvin Jones Fellowship Award.

Laura Papiccio

DIRECTOR

Laura has a Bachelor of Business (Human Resources & Management). She joined the Montagu Board in September 2021 and brings over 13 years' experience as an executive manager across the hospitality, construction, medical, and not-for-profit sectors in Hobart and overseas. Utilising her skills in HR and Communications, Laura demonstrates a strong commitment to strategic planning and good governance, along with a passion for organisations that work with the Tasmanian community.

Mark Crosswell

DIRECTOR & TREASURER

Mark joined the Montagu Board in September 2023. Mark Crosswell graduated from the University of Tasmania in 2014 with a combined Bachelor of Business (Accounting) and Bachelor of Laws with First Class Honours in Law. He was admitted to the Supreme Court of Tasmania in August 2015. Mark is a Senior Associate with Page Seager assisting clients, including property owners and developers, with a broad range of property and commercial transactions and advice. Mark has previously held the position of Treasurer with the Hobart Aquatic Swimming Club and is a Board member of Water Polo Tasmania Inc.

Joseph Collidge

DIRECTOR

Joe joined the Board in June 2023. His qualifications include a Master of Business Administration from Latrobe University and a Bachelor of Business (majoring in accounting) through UTAS. Joe has governance experience through his membership of the committee of the Taroon football club and is currently employed as a Relationship Executive at the Commonwealth Bank. Joe has a keen interest in the NDIS and the broader disability sector through having family members living with disability.

Montagu Life Members

John Dean (deceased)
Cora Dean (deceased)
Rien de Vries (deceased)
Di Fuglsang (deceased)
Allan McKinlay
Byron Nicol
Judi Reid
Marina Campbell

Treasurer's Report

It is my pleasure to present a summary of Montagu's financial performance for the 2023/24 financial year. Further details can be found in the audited financial statements included in this Annual Report.



Mark Crosswell
TREASURER

Throughout the financial year, Montagu Community Living has continued to pursue its mission of supporting people

living with disability through the provision of high-quality, individualised services that promote skill development, capacity building, and resilience. Clients are supported to live the life they choose, build their social and family relationships, and participate in communities of their choice.

The Montagu Board reviews the financial performance of the organisation every month, monitoring income and expenditure against an approved budget to ensure that the organisation remains a going concern. The financial performance of the organisation has been impacted by various factors during the year including:

- Inability to attract sufficient tenants to the Clarendon Vale and New Norfolk Houses
- Significant reductions in NDIS Plan funding despite little or no change to the support needs of clients
- Increased administrative tasks to track payments against claims submitted and to follow up on partial or non-payments
- An increase in doubtful and bad debts that were largely the result of some client's NDIS funding being exhausted before the next plan review
- In response to these issues, the Board and Management has:
 - Made the decision to close the New Norfolk House by the end of 2023/24 financial year
 - Raised the issue of reductions in NDIS Plan funding with the National Disability Insurance Agency for review
- Cleared a backlog of doubtful debts
- Worked with our key Software provider to develop tools and reports that enable us to track plan expenditure over time so that supports can

be adjusted before funding expires

As shown in the chart opposite, in 2023/24:

- Revenue increased to \$11,165,239 compared to \$9,273,806 in 2022/23 (a 20.4% increase)
- Expenditure increased to \$11,451,251 from \$8,893,828 in 2022/23 (a 28.8% increase)
- The final result for 2023/24 is a deficit of \$286,012 compared to a surplus of \$379,978 in 2022/23
- Net Assets totalled \$3,323,086 compared to \$3,609,098 (a decrease of 8.6%)
- The current ratio dropped from 3.5x to 2.9x but remains well ahead of the industry standard of 1.5x -2.0x

The financial performance of the organisation has been fair in the circumstances. Ongoing changes to the operating environment, particularly price controls and NDIA policy decisions, continue to provide challenges across the sector with many providers reporting losses for multiple years.

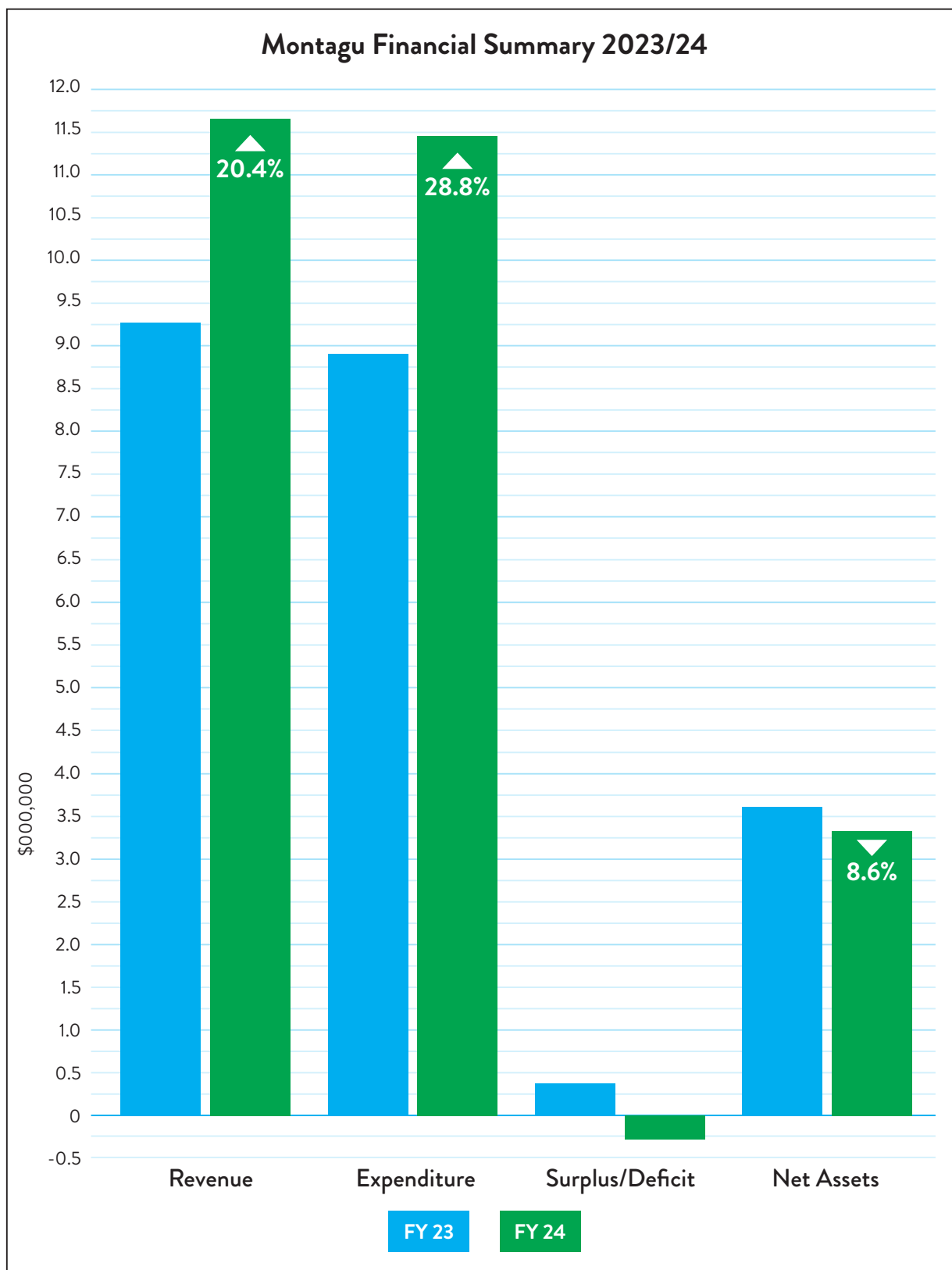
An analysis of financial results undertaken by National Disability Services (peak body for NDIS Providers) showed that 2022/23 was the worst year for financial performance of providers in Tasmania since the commencement of the NDIS with 80% of organisations with NDIS income between \$10M-\$20M reporting a loss. Furthermore, fifty percent of providers responding to an independent survey indicated that they expected to report a loss for 2023/24.

Board decisions in recent years have ensured that Montagu remains in a strong financial position with highly liquid assets and low liabilities. The Board will continue to monitor the financial performance of Montagu and work with management to negotiate the changes to the operating environment over the coming years.

I'd like to thank the CEO and Haidee Gamble (Finance Manager) for their work and support through what has been a difficult year. Together we are preparing to face the challenges that the new financial year will bring.

A handwritten signature in black ink, appearing to read 'M. Crosswell'.

Mark Crosswell
TREASURER



Montagu Community Living Inc.

ABN 93552 037118

Financial Report

For the Year Ended 30 June 2024

Montagu Community Living Inc.

ABN 93552 037118

For the Year Ended 30 June 2024

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Montagu Community Living Inc.

ABN 93552 037118

Board Report

30 June 2024

The Board members submit the financial statements of the Association for the financial year ended 30 June 2024.

1. General information

Board members

The names of Board members throughout the year and at the date of this report are:

Judi Reid	Chair
Sarah Davidson	Deputy Chair
Byron Nicol	Director and Public Officer
Laura Papiccio	Director
Phil Mollineaux	Acting Treasurer (1/07/2023 - 26/09/2023)
Zsuzsz Kollo	Director
Kimberley Martin	Director (Resigned 28/05/2024)
Joseph Collidge	Director (Appointed 28/05/2024)
Mark Croswell	Treasurer (Appointed 26/09/2023)

Principal activities

The principal activities of the Association during the financial year were to provide support to people with a disability. Montagu Community Living Inc. provides services to people living within shared housing, people living in their own home in the community and to people accessing the community for social or educational support or skill development.

Significant changes

No significant change in the nature of these activities occurred during the year.

2. Business Review

Operating result

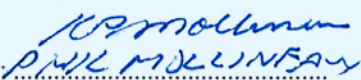
The net surplus/(deficit) of the Association for the financial year amounted to \$ (286,012) (2023: \$ 379,978).

3. Other items

Significant changes in state of affairs

No other significant changes in the Association's state of affairs occurred during the financial year.

Signed in accordance with a resolution of the Members of the Board:

Board Member: 

Board Member: 

Dated this 24 day of September 2024.

Montagu Community Living Inc.

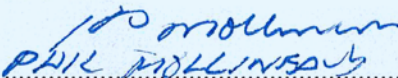
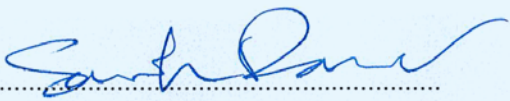
ABN 93552 037118

Board Declaration - per section 60.15 of the Australian Charities and Not-for-profits Commission Regulation 2022

The Board declare that in the Board's opinion

- there are reasonable grounds to believe that Montagu Community Living Inc. is able to pay all of its debts, as and when they become due and payable; and
- the financial statements and notes satisfy the requirements of the *Australian Charities and Not-for-profits Commission Act 2012 (Cth)*.

Signed in accordance with subsection 60.15(2) of the *Australian Charities and Not-for-profit Commission Regulation 2022*

Board Member  Board Member 

Dated this 24 day of September 2024.

Montagu Community Living Inc.

ABN 93552 037118

Statement of Comprehensive Income For the Year Ended 30 June 2024

	2024	2023
	\$	\$
Income		
Fair value increment of financial assets	12,825	-
Gain on sale of assets	3,879	8,880
Interest and distributions received	74,763	61,930
NDIS funding	10,538,360	8,862,707
Other funding	249,252	173,576
Rental income	226,496	123,807
Sundry income	60,147	42,906
Total Income	11,165,722	9,273,806
Less: other expenses		
Audit and accounting	9,550	11,828
Advocacy	482	-
Bad and doubtful debts	203,948	12,534
Bank charges	5,052	2,030
Consultants	14,703	20,389
Depreciation and amortisation	291,394	194,633
Furniture & equipment	5,385	81,342
Governance	1,598	2,699
Information technology	55,831	65,958
Insurance	39,210	36,176
Interest: leased asset	28,011	19,188
Loss on sale of assets	842	-
Memberships	-	8,836
Quality	9,150	20,094
Salaries and related costs	10,455,318	8,191,309
Units subsidy	64,772	12,321
Short term accommodation cost	28,072	17,337
Staff expenses	133,690	102,029
Utilities and consumables	104,725	95,125
Total other expenses	11,451,733	8,893,828
Net surplus/(deficit) for the year	(286,011)	379,978
Other comprehensive income	-	-
Total comprehensive income	(286,011)	379,978

The accompanying notes form part of these financial statements.

Montagu Community Living Inc.

ABN 93552 037118

Statement of Financial Position As At 30 June 2024

	Note	2024 \$	2023 \$
ASSETS			
CURRENT ASSETS			
Cash and cash equivalents	3	1,049,154	1,614,137
Financial assets		2,139,239	2,057,827
Trade and other receivables	4	1,485,259	1,114,309
TOTAL CURRENT ASSETS		4,673,652	4,786,273
NON-CURRENT ASSETS			
Plant and equipment	5	149,566	171,667
Right-of-use asset	6	255,513	380,530
TOTAL NON-CURRENT ASSETS		405,079	552,197
TOTAL ASSETS		5,078,731	5,338,470
LIABILITIES			
CURRENT LIABILITIES			
Trade and other payables	7	520,555	508,687
Employee benefits	8	798,796	664,983
Lease liabilities		185,082	198,604
TOTAL CURRENT LIABILITIES		1,504,433	1,372,274
NON-CURRENT LIABILITIES			
Employee benefits	8	159,310	162,316
Lease liabilities		91,902	194,782
TOTAL NON-CURRENT LIABILITIES		251,212	357,098
TOTAL LIABILITIES		1,755,645	1,729,372
NET ASSETS		3,323,086	3,609,098
EQUITY			
Reserves		240,000	-
Accumulated surpluses		3,083,086	3,609,098
TOTAL EQUITY		3,323,086	3,609,098

The accompanying notes form part of these financial statements.

Montagu Community Living Inc.

ABN 93552 037118

Statement of Changes in Equity For the Year Ended 30 June 2024

2024

	Accumulated Surpluses	General Reserves	Personal Leave Reserve	Total
	\$	\$	\$	\$
Balance at 1 July 2023	3,609,098	-	-	3,609,098
Net surplus/(deficit) for the year	(286,012)	-	-	(286,012)
Transfer to/(from) reserve	(240,000)	240,000	-	-
Balance at 30 June 2024	3,083,086	240,000	-	3,323,086

2023

	Accumulated Surpluses	General Reserves	Personal Leave Reserve	Total
	\$	\$	\$	\$
Balance at 1 July 2022	3,001,799	70,000	157,321	3,229,120
Net surplus/(deficit) for the year	379,978	-	-	379,978
Transfer to/(from) reserve	227,321	(70,000)	(157,321)	-
Balance at 30 June 2023	3,609,098	-	-	3,609,098

The accompanying notes form part of these financial statements.

Montagu Community Living Inc.

ABN 93552 037118

Statement of Cash Flows

For the Year Ended 30 June 2024

	Note	2024 \$	2023 \$
CASH FLOWS FROM OPERATING ACTIVITIES:			
Receipt from government		-	236,772
Customer fees and other income		10,361,270	8,213,520
Interest and distribution received		74,763	61,930
Payments to suppliers & employees		(10,874,113)	(8,375,370)
Net cash provided by operating activities	11	<u>(438,080)</u>	<u>136,852</u>
CASH FLOWS FROM INVESTING ACTIVITIES:			
Proceeds from sale of assets		3,879	15,000
Purchase of plant and equipment		(11,363)	-
Payment for investments		<u>(68,587)</u>	<u>(57,352)</u>
Net cash used by investing activities		<u>(76,071)</u>	<u>(42,352)</u>
CASH FLOWS FROM FINANCING ACTIVITIES:			
Interest paid		(28,011)	(19,188)
Lease payments		<u>(22,821)</u>	<u>(28,276)</u>
Net cash used by financing activities		<u>(50,832)</u>	<u>(47,464)</u>
Net increase/(decrease) in cash and cash equivalents held		(564,983)	47,036
Cash and cash equivalents at beginning of year		<u>1,614,137</u>	<u>1,567,101</u>
Cash and cash equivalents at end of financial year	3	<u>1,049,154</u>	<u>1,614,137</u>

The accompanying notes form part of these financial statements.

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements

For the Year Ended 30 June 2024

The financial statements cover Montagu Community Living Inc. as an individual entity. Montagu Community Living Inc. is a not-for-profit Association incorporated in Tasmania under the Associations *Incorporation Act (TAS) 1964 ('the Act')*.

The functional and presentation currency of Montagu Community Living Inc. is Australian dollars.

1 Summary of Material Accounting Policies

(a) Basis of Preparation

This financial report is a special purpose financial report prepared in order to satisfy the financial reporting requirements of the *Australian Charities and Not-for-profits Commission Act 2012 (Cth)*. The Board has determined that the Association is not a reporting entity. The Association is a not-for-profit entity for financial reporting purposes.

The financial statements have been prepared in accordance with the minimum requirements of the *Australian Charities and Not-for-profits Commission Act 2012 (Cth)* and therefore comply with the following Australian Accounting Standards as issued by the Australian Accounting Standards Board:

- AASB 101 Presentation of Financial Statements;
- AASB 107 Statement of Cash Flows;
- AASB 108 Accounting Policies, Changes in Accounting Estimates and Errors;
- AASB 1048 Interpretation of Standards;
- AASB 1054 Australian Additional Disclosures; and
- AASB 124 Related Party Disclosures.

These special purpose financial statements comply with all the recognition and measurement requirements in Australian Accounting Standards. No other Accounting Standards have been intentionally applied in the compilation of this financial report.

The financial report, except for the cash flow information, has been prepared on accruals basis, is based on historic costs and does not take into account changing money values or, except where specifically stated, current valuations of non-current assets. The amounts presented within the financial statements have been rounded to the nearest dollar.

(b) Comparative Figures

When appropriate, comparative figures have been adjusted to conform to changes in presentation for the current financial year.

(c) Cash and Cash Equivalents

Cash and cash equivalents comprises cash on hand, demand deposits and short-term investments which are readily convertible to known amounts of cash and which are subject to a non material risk of change in value.

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements

For the Year Ended 30 June 2024

1 Summary of Material Accounting Policies

(c) Cash and Cash Equivalents

Bank overdrafts also form part of cash equivalents for the purpose of the statement of cash flows and are presented within current liabilities on the statement of financial position.

(d) Leases

The Montagu Community Living Inc as a Lessee

At the lease commencement, the Association recognises a right-of-use asset and associated lease liability for the lease term. The lease term includes extension periods where the Association believes it is reasonably certain that the option will be exercised.

The right-of-use asset is measured using the cost model where cost on initial recognition comprises of the lease liability, initial direct costs, prepaid lease payments, estimated cost of removal and restoration less any lease incentives received.

The right-of-use asset is depreciated over the lease term on a straight line basis and assessed for impairment in accordance with the impairment of assets accounting policy.

The lease liability is initially measured at the present value of the remaining lease payments at the commencement of the lease.

The Montagu Community Living Inc as a Lessee

The Association subleases houses to occupants who pay rent directly to Housing Tasmania, resulting in non-cash rental income to the Association who has the ultimate liability to the Department. As the Association does not transfer substantially all the risks and rewards incidental to ownership of an asset are classified as operating leases. Rental income arising is accounting for on a straight-line basis over the relevant lease term.

(e) Trade and Other Receivables

Trade receivables are initially recognised at fair value and subsequently measured at amortised cost using the effective interest method, less any provision for expected credit losses. Trade and other receivables are generally due for settlement within 30 days and recognised at the transaction price. The Association performs an assessment of doubtful debts each year.

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements For the Year Ended 30 June 2024

1 Summary of Material Accounting Policies

(f) Plant and Equipment

Motor Vehicles and Plant and Equipment are carried at cost less, where applicable, any accumulated depreciation.

The depreciable amount of all plant and equipment is depreciated over the useful lives of the assets to the Association commencing from the time the asset is held ready to use.

The depreciation rates used for each class of depreciable asset are shown below:

Fixed asset class	Depreciation rate
Motor vehicles	18.75% - 22.5%
Plant and equipment	14% - 50%

At the end of each annual reporting period, the depreciation method, useful life and residual value of each asset is reviewed. Any revisions are accounted for prospectively as a change in estimate.

(g) Trade and Other Payables

Trade and other payables are stated at cost, which approximates fair value due to the short term nature of these liabilities.

(h) Employee Benefits

Provision is made for the Association's liability for employee benefits arising from services rendered by employees to the end of the reporting period.

Employee benefits that are expected to be wholly settled within one year have been measured at the amounts expected to be paid when the liability is settled.

Contribution made by the Association to an employee superannuation fund are charged as expense when incurred.

(i) Provisions

Provisions are recognised when the Association has a legal or constructive obligation, as a result of past events, for which it is probable that an outflow of economic benefits will result and that outflow can be reliably measured.

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements For the Year Ended 30 June 2024

1 Summary of Material Accounting Policies

(j) Adoption of New and Revised Accounting Standards

The Association has adopted all standards which became effective for the first time at 30 June 2024. The adoption of these standards has not caused any material adjustments to the reported financial position, performance or cash flow of the Association.

The Association has adopted the amendments to AASB 101 Presentation of Financial Statements which require only the disclosure of material accounting policy information rather than material accounting policies. Material policy information satisfy one of the following requirements:

- Relates to change in accounting policy;
- Policy has been developed in the absence of an explicit accounting standard requirement;
- Documents an accounting policy choice;
- Relates to an area of material judgement or estimation; or
- Relates to a complex transaction and is required to explain the treatment to the users.

(k) New Accounting Standards for Application in Future Periods

The AASB has issued new and amended Accounting Standards and Interpretations that have mandatory application dates for future reporting periods. The Standard AASB 2023-3 Amendments to Australian Accounting Standards Classification of Liabilities as Current or Non-current amends AASB 101 to classify requirements for the presentation of liabilities in the statement of financial position as current or non-current and the standard AASB 2022-5 Amendment to Lease Liability in a Sale and Leaseback, Amends AASB 16 Leases to add subsequent measurement for sale and leaseback transactions that satisfy the requirements in AASB 15 Revenue from Contracts with Customers to be account for as a sale. The Association has decided against early adoption of these Standards. The Association does not expect the effect of either of these statements to be material.

(l) Income Tax

The Association is exempt from income tax under Division 50 of the *Income Tax Assessment Act 1997*.

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements For the Year Ended 30 June 2024

1 Summary of Material Accounting Policies

(m) Revenue and Other Income

Revenue is measured at the fair value of the consideration received or receivable net of the amount of goods and services tax (GST) payable to the Australian Taxation Office. Revenue is measured on major income categories as follows:

Interest revenue

Interest revenue is recognised over the period for which the funds are invested.

Donations

Donations income is recognised when the Association obtains control over the funds which is generally at the time of receipt.

NDIS Revenue - Revenue from contracts with customers

The core principle of AASB 15 is that revenue is recognised on a basis that reflects the transfer of promised goods or services to customers at an amount that reflects the consideration the Association expects to receive in exchange for those goods or services. Revenue is recognised by applying a five-step model as follows:

1. Identify the contract with the customer
2. Identify the performance obligations
3. Determine the transaction price
4. Allocate the transaction price to the performance obligations
5. Recognise revenue as and when control of the performance obligations is transferred.

Generally the timing of the payment for sale of goods and rendering of services corresponds closely to the timing of satisfaction of the performance obligations, however where there is a difference, it will result in the recognition of a receivable, contract asset or contract liability.

None of the revenue streams of the Association have any material financing terms as there is less than 12 months between receipt of funds and satisfaction of performance obligations.

All revenue is stated net of the amount of goods and services tax (GST).

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements

For the Year Ended 30 June 2024

1 Summary of Material Accounting Policies

(n) Goods and Services Tax (GST)

Revenues, expenses and assets are recognised net of the amount of GST, except where the amount of GST incurred is not recoverable from the Australian Tax Office. In these circumstances, the GST is recognised as part of the cost of acquisition of the asset or as part of an item of the expense. Receivables and payables in the statement of financial position are shown inclusive of GST.

2 Critical Accounting Estimates and Judgements

The Board evaluates estimates and judgements incorporated into the financial report are based on historical knowledge and best available current information. Estimates assume a reasonable expectation of future events and based on current trends and economic data, obtained both externally and within the Association. However as additional information is known then the actual results may differ from the estimates.

The Board has made estimates and judgements when applying the accounting policies with respect to:

Estimation of Useful Lives of Assets

The Association determines the estimated useful lives and related depreciation and amortisation charges for its plant and equipment and right of use assets. The useful lives could change materially as a result of technical innovations or some other event. The depreciation and amortisation charge will increase where the useful lives are less than previously estimate lives, or technically obsolete or non-strategic assets that have been abandoned or sold will be written off or written down.

Long Service Leave

The liability for long service leave is recognised and measured at the present value of the estimated cash flows to be made in respect of all employees at the reporting date. In determining the present value of the liability, estimates include probabilities of reaching future entitlements have been taken into account.

Right of Use Assets Lease Term

The Association considered the extension option on the buildings and have determined that due to the market rent reviews and the remaining term of the non-cancelable lease term, it is reasonably certain that the Association will choose to exercise the option and therefore the lease payments that would arise during the optional extension periods has been included in the lease liability.

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements For the Year Ended 30 June 2024

3 Cash and Cash Equivalents

	2024	2023
	\$	\$
Cash at bank	1,049,154	1,614,032
Cash on hand	-	105
	<u>1,049,154</u>	<u>1,614,137</u>

4 Trade and Other Receivables

	2024	2023
	\$	\$
Debtors	1,355,500	318,715
Provision for doubtful debts	(203,944)	-
	<u>1,151,556</u>	<u>318,715</u>
Accrued income	68,004	552,730
Prepayments	265,699	242,864
	<u>1,485,259</u>	<u>1,114,309</u>

5 Plant and Equipment

	2024	2023
	\$	\$
Plant and equipment		
At cost	66,994	55,631
Accumulated depreciation	(56,819)	(55,631)
Total plant and equipment	<u>10,175</u>	<u>-</u>
Motor vehicle		
At cost	292,011	292,011
Accumulated depreciation	(152,620)	(120,344)
Total motor vehicles	<u>139,391</u>	<u>171,667</u>
Total plant and equipment	<u>149,566</u>	<u>171,667</u>

6 Right of Use Asset

	2024	2023
	\$	\$
Right of use asset - properties		
At cost	498,342	769,227
Accumulated depreciation	(242,829)	(388,697)
	<u>255,513</u>	<u>380,530</u>

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements For the Year Ended 30 June 2024

7 Trade and Other Payables

	2024	2023
	\$	\$
Current		
Creditors	192,181	167,105
GST payable/(receivable)	(33,753)	(39,414)
Accrued expenses	285,373	201,677
Payroll liabilities	76,754	179,319
	<u>520,555</u>	<u>508,687</u>

8 Employee Benefits

	2024	2023
	\$	\$
Current		
Provision for annual leave	568,836	482,166
Provision for long service leave	229,961	182,817
	<u>798,797</u>	<u>664,983</u>
Non-Current		
Provision for long service leave	159,310	162,316
	<u>159,310</u>	<u>162,316</u>

9 Auditors' Remuneration

	2024	2023
	\$	\$
Remuneration of the auditor of the Association, Crowe Audit Australia, for:		
- Audit of the financial statements for the year	<u>7,750</u>	<u>8,015</u>
Total	<u>7,750</u>	<u>8,015</u>

10 Contingent Assets and Contingent Liabilities

In the opinion of the Board, the Association did not have any contingencies at 30 June 2024 (30 June 2023: Nil).

Montagu Community Living Inc.

ABN 93552 037118

Notes to the Financial Statements For the Year Ended 30 June 2024

11 Cash Flow Information

Reconciliation of net surplus/(deficit) to net cash provided by operating activities:

	2024	2023
	\$	\$
Net surplus/(deficit) for the year	(286,012)	379,978
Non-operating cash flows in surplus/(deficit):		
- depreciation and amortisation	291,394	194,633
- Fair value increment of financial asset	(12,825)	-
- net (gain)/loss on disposal of assets	(3,879)	(8,880)
- interest on leased asset	28,011	19,188
- rent income on leases*	(226,495)	(123,807)
Changes in assets and liabilities:		
- (increase)/decrease in trade and other receivables	(574,894)	(702,329)
- increase/(decrease) in trade and other payables	215,812	254,206
- increase/(decrease) in employee benefits	130,808	123,863
Cashflow from operations	<u>(438,080)</u>	<u>136,852</u>

* The Association has entered into lease agreements with the Director of Housing Tasmania as a tenant. The Association subleases those houses to occupants who pay rent directly to Housing Tasmania, resulting in non-cash rental income to the Association who has the ultimate liability to the Department.

12 Related Party Transaction

During the year, the Association did not enter into any agreement or transact with any related parties.

13 Key Management Personnel Disclosures

The remuneration paid to key management personnel of the Association is \$ 221,891(2023: \$202,364)

14 Events After the End of the Reporting Period

There are no subsequent events as at reporting date to be disclosed or adjusted for (2023: Nil).

15 Association Details

The registered office of the Association is:
Montagu Community Living Inc.
1 Bowen Road
MOONAH TAS 7009

Montagu Community Living Inc.

ABN 93552 037118

Auditors' Independence Declaration under Section 60-40 of the Australian Charities and Not-for-profits Commissions Act 2012 (Cth) Montagu Community Living Inc.

I declare that, to the best of my knowledge and belief, during the year ended 30 June 2024, there have been:

- (i) no contraventions of the auditor independence requirements as set out in the *Australian Charities and Not-for-profits Commissions Act 2012 (Cth)* in relation to the audit; and
- (ii) no contraventions of any applicable code of professional conduct in relation to the audit.



Crowe Audit Australia

Alison Flakemore
Senior PartnerDated this ...18...day of ...September...2024.
Hobart, Tasmania.

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Montagu Community Living Inc.

ABN 93552 037118

Independent Audit Report to the members of Montagu Community Living Inc.

Opinion

We have audited the financial report of Montagu Community Living Inc. (the Association), which comprises the statement of financial position as at 30 June 2024, the statement of comprehensive income, the statement of changes in equity, the statement of cash flows for the year then ended, and notes to the financial statements, including a summary of material accounting policies, and the Board Declaration.

In our opinion, the accompanying financial report of the Association has been prepared in accordance with Division 60 of the *Australian Charities and Not-for-profits Commission Act 2012 (Cth)*, including:

- giving a true and fair view of the Association's financial position as at 30 June 2024 and of its financial performance and cash flows for the year then ended; and
- complying with Australian Accounting Standards to the extent described in Note 1 to the financial statements, and Division 60 the *Australian Charities and Not-for-profits Commission Regulation 2022*.

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 Association in accordance with the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 Code of Ethics for Professional Accountants (*including Independence Standards*) (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 statements, which describe the basis of accounting. The financial report has been prepared to assist the Association to meet the requirements of the *Australian Charities and Not-for-profits Commission Act 2012 (Cth)*. As a result, the financial report may not be suitable for another purpose. Our opinion is not modified in respect of this matter.

Other Information

The Board is responsible for the other information. The other information comprises the Board Report the year ended 30 June 2024, but does not include the financial report and our auditor's report thereon.

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Montagu Community Living Inc.

ABN 93552 037118

Independent Audit Report to the members of Montagu Community Living Inc.

Our opinion on the financial report does not cover the other information and accordingly we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial report, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial report or our knowledge obtained in the audit or otherwise appears to be materially misstated.

If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Responsibilities of the Board for the Financial Report

The Board is responsible for the preparation and fair presentation of the financial report and has determined that the basis of preparation described in Note 1 to the financial statements is appropriate to meet the needs of the members in accordance with the financial reporting requirements of the applicable legislation and for such internal control as the Board 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, the Board is responsible for assessing the Association'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 the Board either intends to liquidate the Association or to cease operations, or has no realistic alternative but to do so.

The Board is responsible for overseeing the Association'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.

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Montagu Community Living Inc.

ABN 93552 037118

Independent Audit Report to the members of Montagu Community Living Inc.

As part of an audit in accordance with the Australian Auditing Standards, we exercise professional judgement and maintain professional skepticism 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 Association's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Board.
- Conclude on the appropriateness of the Board'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 Material doubt on the Association'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 Association 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.

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Montagu Community Living Inc.

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Independent Audit Report to the members of Montagu Community Living Inc.

We communicate with the Board regarding, among other matters, the planned scope and timing of the audit and material audit findings, including any material deficiencies in internal control that we identify during the audit.

**Crowe Audit Australia****Alison Flakemore**
Senior Partner

Dated this ...25...day of ...September...2024.

Hobart, Tasmania.

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Montagu Community Living

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