



ANNUAL REPORT

Financial year 2023-2024

BEYOND WORDS IS AN INITIATIVE OF THE BIOGRAPHY PROGRAM

ABN 12 153 358 313





Contents

- HIGHLIGHTS..... 1
- BOARD CHAIR REPORT..... 2
- STRATEGIC PLAN REPORT 3
- PUBLIC OFFICER REPORT 4
- TREASURER REPORT 5
- FINANCIAL STATEMENTS..... 6
- FUNDRAISING SUBCOMMITTEE REPORT 7
- OPERATIONS & VOLUNTEER COORDINATOR REPORT 8
- EDITORIAL TEAM REPORT 9
- MARKETING REPORT 10
- I.T. REPORT 10
- TRAINING AND PARTNERSHIPS 11
- MENTORING AND FORUMS REPORT 12
- NEWSLETTER REPORT..... 13
- WITH THANKS 14

FRONT COVER PHOTO:
OUR YOUNGEST CLIENT THIS FINANCIAL YEAR, GRANT, WITH HIS BIOGRAPHER TIANA, AND
OUR OLDEST CLIENT, JUNE, WHO TURNED ONE HUNDRED THIS YEAR.



HIGHLIGHTS FOR 2023–2024

CLIENT REFERRALS

47

BIOGRAPHIES

28

biographies completed

& 14

more were in progress



48 PAGES



AVERAGE LENGTH OF A BIOGRAPHY

The shortest one was 20 pages and the longest was 90 pages

AGED CARE RESIDENCES



19

We worked with 19 different locations, with 5 in regional Victoria

64 volunteers worked as either volunteer biographers or in operational roles such as board members, editors, assessors and administration

64 VOLUNTEERS



AVERAGE HOURS PER BIOGRAPHY

66



- 1,844 hours were spent creating biographies
- *Many more hours were donated for training and operational matters*

VOLUNTEER PROFILE

- 81% of our volunteers are female
- 54% of our volunteers are retired or semi-retired



BOARD CHAIR REPORT

I am delighted to report a year of further progress on our goal of building a strong and sustainable organisation and improving and celebrating the lives of the people whose biographies we write. Key achievements for the board are:

- Beyond Words is now owned and run by a passionate community of biographers and operational volunteers. They are too many to mention here but their commitment and enthusiasm has established Beyond Words as the strong and viable organisation it is today. The additional roles undertaken by board members reflects the committed and co-operative way we work at Beyond Words.
- We have set a clear vision and targets for our development over the next three years.
- We are employing Suzanne McDonnell and Caroline Trubridge in part time positions to manage our volunteers, operations, information and communications. They are supporting the board and volunteers in building organisational structures and systems to enable our teams of volunteers to provide biographies and the services which support them.
- We are financially stable with growing support making us sustainable and enabling the gradual growth of our services in Melbourne and regional Victoria.

The board continues to be active, engaged and increasingly clear about its goals and governance responsibilities. It has also played a key role in fundraising.

After three years of solid commitment, two of our original board members have stepped down:

- Brigid Ryan brought legal expertise, intelligent questions, and a love of biography to the board and will continue to write and edit our biographies.
- Dianne Parslow added an understanding of voluntary organisations and a sharp eye for detail and process, essential in any good team. She continues as an editor, formatter, and trainer.

Continuing board members are: Austin Paterson, Christine Childs, Nigel McQuitty, Richard Hill, and Vera Considine.

Every part of this annual report reflects and details the success and direction I have outlined here and promises an exciting future for Beyond Words

RICHARD HILL





STRATEGIC PLAN REPORT

In late 2023, as we entered the last months of the 2021-2024 strategic plan, a Strategic Planning Committee, (Richard Hill, Austin Paterson, Chris Childs and Nigel McQuitty) was formed to manage the process of developing a plan for the next three years.

On December 15th the committee and other Board members met to review past achievements and focus on Beyond Words direction for the next three years. The 2021-2024 plan had helped rebuild our organisation, guide us through COVID lockdowns and create a more sustainable infrastructure. It was agreed that the 2024-2027 strategic plan needed to consolidate who we are, what we are about and define a sustainable plan of development.

Having a strategic plan that inspires and empowers our volunteers is critical. Consequently, engaging the wider Beyond Words community in the development of the plan was considered essential by the board. On Saturday 23 March 2024 all members of our Beyond Words community were invited to discuss their experiences, ideas and insights in response to a range of strategic questions in an online forum. People who couldn't attend were encouraged to participate via email and many responded with useful feedback.

Responses from the forum and emails were compiled into a themed report for board consideration. The board worked through the findings of the report at an in-person deep dive on Friday April 12. Following this the Strategic Planning Committee and members of the operations group have collaborated on refining the 2024-2027 plan with SMART goals and measurable key performance indicators.

The result is a plan that reinforces our core commitment to assisting residents of aged care residences to tell their life-stories, and plans for sustainable geographic growth, partnership relationships, brand development and well-planned, future-focused projects. It identifies that volunteer development, support and connection is the lifeblood of Beyond Words current and future success.

CHRIS CHILDS





PUBLIC OFFICER REPORT

I confirm that all necessary compliance and governance requisites have been completed as legally required.

Our organisation is registered with the Australian Charities and Not for Profits Commission (ACNC) and our Annual Information Statement will be lodged with the commission by December 31, 2024 as required.

As recommended for volunteer organisations such as ours, we have in place Volunteer Accident Insurance, Public Liability Insurance, Cyber Insurance and Directors Insurance to protect all our people and the organisation as we go about our work.

The board encourages biographers to become company members to monitor our work and ensure we are effectively pursuing the interests of the clients whose biographies we celebrate. There are currently fourteen company members.

Thanks to Brigid Ryan who has held this role for several years.

SUZANNE MCDONNELL





TREASURER REPORT

The demand for family history is growing and so are the demands on our resources.

Thanks to a very active fundraising committee headed by our Chairman, Richard Hill and supported by Austin Paterson and Lyn Davies we have attracted generous funding from the Jack Brockhoff Foundation and Equity Trust Limited, and our partnership with Calvary Health Care to provide the financial backing to engage our Coordinator, Suzanne McDonnell and our Information Officer, Caroline Trubridge, both of whom have provided a level of professional support to take Beyond Words to another level of service.

Thanks to our volunteer biographers, who generously donate an estimated fifty to eighty hours of their time on any one biography. and our volunteer editors and formatting team. Together they produce a priceless source of family history and provide warm companionship and engagement for our story tellers in residential aged care. And then there is our volunteer team of trainers, assessors and mentors who donate their time to support our biographers.

This year as we extended our services, our financial resources were stretched to the limit resulting in a \$246.00 operating loss. However, we do have prepaid reserves of \$57,000.00 to carry forward into the 2024-25 financial year.

Donations from family members, who are the fortuitous beneficiaries of our services, are a valued source of revenue and are greatly appreciated. We hope to bring greater awareness to family members who benefit from these biographies and encourage an improved level of income from this source to sustain the growing demand for our services.

VERA CONSIDINE





FINANCIAL STATEMENTS

Balance Sheet and Profit & Loss Statement

FINANCIAL STATEMENTS FOR JUNE 2024

Balance Sheet at 30th. June 2024

Assets	\$	c
Cash at Bank: Savings Acc.	44,185.78	
Cash at Bank: Operating Acc	28,007.38	
Cash Advance:	118.50	
Insurance Prepayment	1,167.08	
Marketing Material	271.78	
Office Equipment: Printer	692.00	
Recorder Stock on hand	1,777.20	
Startup Capitalised Costs	859.00	
Total Assets	77,078.72	
Liabilities		
Creditors	5,810.76	
Grant Prepayments		
Calvary	5,000.00	
Equity	25,000.00	
Perpetual	27,600.00	
Total Liabilities	63,410.76	
Equity	13,667.96	
Retained Earnings	14,094.53	
Surplus/Loss	426.57	
Equity	13,667.96	

Profit/Loss Statement at 30th. June 2024

	Actual
Income	\$ c
Grants	54,000.00
Donations	3,590.00
Sale of Recorders	705.84
Other Income	578.78
Total Income	58,874.62
Expenses	
Publishing	1,161.59
Training	4,904.87
Administration	6,613.13
Information Officer	22,221.60
Coordinator	24,400.00
Total Expenses	59,301.19
Operating Surplus/Loss	- 426.57



FUNDRAISING SUBCOMMITTEE REPORT

The fundraising sub-committee's purpose is to secure funds and in-kind contributions to ensure the financial viability and growth of Beyond Words. Authorized by the board, the committee plans, coordinates, and oversees all fundraising activities, including grant applications and meetings with potential funding bodies such as aged care facilities, philanthropic trusts, and corporate organizations. The committee may recommend fundraising projects to the board, ensuring alignment with the values and objectives of Beyond Words. Importantly, no commitments outside usual operations can be made without prior written board approval.

Over the past year, key activities included:

- **Grant Writing:** Researching and applying for grants from trusts and foundations that align with the mission of Beyond Words. A priority has been securing funds to maintain the employment of our two staff members, Suzanne McDonnell and Caroline Trubridge. Notably, Equity Trustees awarded a three-year grant of \$150,000 through the Emma Quayle Trust, and The Percy Baxter Charitable Trust provided \$27,600 for a new initiative in Geelong, benefiting Sirovilla Aged Care Retirement Village. These grants, along with support from the Sir Jack Brockhoff Foundation, are vital for our ongoing work with the elderly.
- **Partnerships and Sponsorships:** Collaborating with aged care organizations, such as Calvary Kooyong, which has sponsored us with \$20,000 over two years, and Blue Cross Aged Care, which has provided free training rooms.
- **Donor Engagement:** Developing strategies to cultivate relationships with current and potential donors through personalized communication and recognition.
- **Online Fundraising:** Utilizing our digital platform for broader online donations.
- We extend our gratitude to the fundraising sub-committee and especially to Lyn Davies for her invaluable expertise in fundraising.

AUSTIN PATERSON





OPERATIONS & VOLUNTEER COORDINATOR REPORT

As operations and volunteer coordinator, I guide the growth and development of the organisation in line with the strategic plan to ensure we remain healthy, vibrant, and sustainable into the future.

Over the past year, the operations team has been busy laying a solid, administrative foundation, priming our grassroots organisation for careful and steady expansion to service more older people living in aged care residences (ACRs) across the state.

Thanks to Caroline Trubridge our data base is a triumph and tracks our operations with ease. Our latest tool, an interactive digital map, shows the location of ACRs, Biographers and Assessors - where we are operational and where we need to be. Policies and procedures are revised as we evolve and grow. The new team of assessors are our on-the-ground ambassadors. They visit ACRs, assess clients, support biographers, and liaise with lifestyle coordinators.

Our sixty-four volunteers are the lifeblood that nourishes Beyond Words, whether on the board, the editing team, the fundraising team, the newsletter team, or program coordination team. If they are biographers and assessors, assist with admin or manage the accounts.

Our volunteer program observes the National Standard for Volunteering on our path to achieve best practise and is a member of Volunteering Victoria, the State's peak volunteering body.

Our online biographer and assessor forums, facilitated by Julie Butcher, allow us to connect, discuss issues, float ideas, mentor and support one another.

Unfortunately, program coordination continues to be affected by lockdowns due to outbreaks of COVID. Some biographers have contracted COVID or flu, causing delays to their work.

Our presence in the Central Highlands continues to grow and is now available in Kyneton, Daylesford, Trentham and Kilmore. Over the coming year we will expand our presence in Geelong and launch a new pilot project to deliver our service into the low-income, retirement village settings.

While we receive occasional requests for our service which are not currently within the scope of our operations, where possible, we do our best to refer them to other private or online biography services.

SUZANNE MCDONNELL





EDITORIAL TEAM REPORT

This year, our small editorial team edited twenty-eight biographies and two biographies from our partner, Calvary. The shortest at twenty-five pages to the longest at eighty-two pages with an average of forty-eight pages. Our editing process strikes a fine balance between retaining the distinctive voice of our storytellers and ensuring accuracy and consistency throughout each precious life story. We feel privileged to have a window into so many fascinating lives and so much of our history.

Although a common refrain from clients is that their lives are not interesting, I believe in the words of Canadian writer Mavis Gallant: 'All lives are interesting; no one life is more interesting than another. Its fascination depends on how much is revealed and in what manner.'

As we edit, we often come across wonderful sentences, like this one, that bring the past to life: 'I remember many other smells... the tannery opposite, horse manure on a hot day, and the whiff of beer when you passed the open pub door.'

In addition to our copyediting and proofreading, several of our volunteers are involved in other facets of Beyond Words, such as board members, biographers, fundraisers, newsletter contributors, and trainers.

As always, thanks to our team of editors, Andrew Funston, Brigid Ryan, Hannah Whiteside, and Val Sterling, who work quickly and accurately to create biographies consistent with our Beyond Words style manual. No biography would be finished and printed without formidable formatting from Dianne Parslow, who ensures a clear layout, of the text, photographs and captions all of which contribute to bringing stories to life and ensuring a legacy recorded for generations to come.

NIGEL MCQUITTY





MARKETING REPORT

Our new logo, which was launched a year ago, has created a fresh identity for Beyond Words, improved the professionalism of the brand and has been implemented across the organisation. It provides a strong platform for our future marketing strategy.

Our Facebook page has had minimal growth, but posts are receiving more interaction and some aged care residences have posted biography presentations on their Facebook pages and 'tagged' us, which improves our interaction rates and visibility.

CAROLINE TRUBRIDGE



I.T. REPORT

Our new information management system has evolved over the year and has improved our day-to-day tracking of clients and volunteers, which is now shared across multiple roles. The system has enabled much more sophisticated reporting on how our program is performing. Data has also been imported from prior years so that all the information is in one place.

Client referral and volunteer application forms are now online and feed directly into our system which has reduced double handling and human error.

Key program processes have been documented, taking into account new roles within the organisation and how they interact with the information management system.

Feedback surveys for clients and their families have been implemented on the website and links added to the last page of the biography presented to the client, but uptake has been slow to date.

Work has been done to improve the training and documentation around the production of the final biography, something many biographers have reported to struggle with in the past.

CAROLINE TRUBRIDGE



TRAINING AND PARTNERSHIPS

The training team has grown greatly over the last year with ten people active in providing initial and continuing training. The quality of our training is enriched by the range of voices and experience in biography work they bring. It is no longer overdependent on one or two key people.

After each training program, we gather a variety of feedback from participants and trainers. We review this feedback and any evidence on performance and retention of the volunteers we train to improve and refine content and methods.

The program now runs over four full days with very positive feedback from recent programs. Blue Cross have generously provided excellent training rooms.

We have also begun to operate in the regions with training in Geelong and Central Highlands completed. More regional training is anticipated in the next year, particularly with the funding of our Geelong Project.

Our target in the next year is to train thirty more Beyond Words biographers and have enough active assessors to cover all the areas and aged care residences where we work. It already looks as though we will exceed that target.

We are also keen to give other organisations the capacity to do biography work. We have provided consultancy and training to some wonderful people at *Calvary Kooyong* helping equip them to design and run their Life Reflections program. We are currently helping edit their first batch of biographies.

We have just signed a memorandum of understanding (MoU) to do similar work with Lifeboat Geelong Foundation who work with survivors of church related sexual abuse and want to provide a biography service to some of their older clients.

Since we started rebuilding Beyond Words, we have run eight training programs and graduated fifty-five new volunteer biographers. Two courses have trained twenty-two Assessors.



RICHARD HILL



MENTORING and FORUMS REPORT

Our aim has been to provide support for biographers in whatever capacity, relevant to Beyond Words, works for them.

We have tried to ensure the on-line monthly forum is a relaxed opportunity for our biographers to meet other colleagues, share their experiences and to seek assistance.

We have discussed numerous issues such as:

- relationships with lifestyle coordinators and first meetings with clients
- diverse challenges relating to cognition and memory
- judgement, pace and client/biographer rapport
- photographs and other inclusions
- presentation/handover sessions
- volunteer satisfaction.

Some topics have been forwarded to the editorial team for advice and the board for further discussion.

‘Forum discussions are always rich and interesting and contribute to a sense of community among all those who attend,’ wrote Anne Stonehouse, who sagaciously recorded each session for the monthly newsletter. She noted, ‘Forums are most successful when a mix of new and experienced biographers participate.’

Also, Caroline Trubridge and Dianne Parslow have provided invaluable support with technology and templates.

A new biographer summed up the Forum when she said, ‘Forums are a great way to feel a sense of belonging and learn stuff!’

JULIE BUTCHER





NEWSLETTER REPORT

CONNECT! Newsletter for Biographers

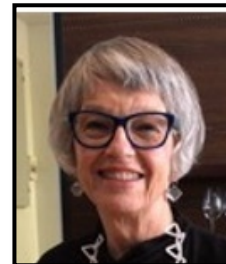
The eleven issues of the monthly newsletter included updates on board matters, training, operations, IT and the monthly forums, as well as advice on formatting and writing. In addition, we included accounts of presentations/handover sessions, book reviews, letters to the editor, useful resources and accounts of situations that challenged biographers.

We gave the newsletter a new name: CONNECT! It reflects our aim to not only keep members of the Beyond Words community informed but also to nurture and strengthen a sense of community and acknowledge all contributions, especially those of biographers. Although the newsletter circulation extends beyond our organisation, biographers are its main audience.

Thanks to Chris Childs, who proofreads the newsletter each month and often contributes articles; Dianne Parslow, who also contributes content, formats the newsletter, finds excellent graphics and photos and distributes the newsletter (along with Caroline Trubridge). Also, thanks to the regular contributors: Julie Butcher, Richard Hill, Dan Kavanaugh, Suzanne McDonnell, Nigel McQuitty, Dianne Parslow and Caroline Trubridge.

Hopefully CONNECT! will continue to get bigger and better. All ideas are welcomed.

ANNE STONEHOUSE





WITH THANKS

We are a volunteer organisation and rely on donations to undertake and publish biographies.

We appreciate the generosity of our donors; and acknowledge the financial contributions of our current sponsors.

Our major supporters with funding or in kind support are:

LYNNE QUAYLE CHARITABLE TRUST

managed by  **Equity Trustees**
Incorporating Australian Executor Trustees

THE JACK BROCKHOFF FOUNDATION 

PERCY BAXTER CHARITABLE TRUST



Major partner and sponsor



0403 771 571



PO Box 708
Camberwell South VIC 3124



info@thebiographyprogram.org.au



www.beyondwords.org.au