



## ANNUAL REPORT

Financial Year 2020-21

### The Biography Program

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# SNAPSHOT

## Restating our Mission

The Biography Program is a not-for-profit company limited by guarantee and operates the Beyond Words biography service. The service is a Victorian health and wellbeing initiative and is needed more than ever in these challenging times. Beyond Words brings together trained and trusted volunteer biographers with residents of aged care facilities. It acknowledges the contribution made by the preceding generations, considers social history to be an important resource and knows that the process of recording a biography through interviews promotes community connectedness and better health.

## Summary of Activities

The program published life stories for residents living in aged care and extended into some new aged care facilities. A large intake of aspiring biographers was accepted with an updated training program delivered. A regular online chat forum and a newsletter also commenced to better connect our volunteers especially during periods of COVID-19 restrictions.

**“We improve lives by listening, recording, writing, editing and publishing life stories.”**

## Looking Ahead

- 1. Establish a sustainable and effective governance structure serving the interests of clients and biographers.*
- 2. Create a high performing organisation that can deliver and develop our biography program and implement agreed changes.*
- 3. Significantly expand, diversify and improve the biography program within three years.*
- 4. Strengthen and build partnerships to grow through collaboration and feedback including enabling opportunities for other agencies to participate in our program.*

## The Board

Richard Hill (Board Chair)

Brigid Ryan (Secretary and Public Officer)

Austin Paterson

Toby Hayes (Treasurer and Chair of the Fundraising Group)

12 September 2021

# BOARD CHAIR REPORT



From wind-up to scale up; 2020-21 tested us. Now we are moving forward a strong organisation and a united team.

2020-21 has brought us: near closure, endless fluctuations in our access to our biography clients, a very tight budget, and the departure of our foundation board and Carol Walker and Wendy Shiels who built Beyond Words into the great program it now is.

Our biggest challenges have been to cover all the work Carol and Wendy did and maintain the rigorous standards of care and respect for our clients that they achieved. We celebrate their work and continue to work to the principles and model they created.

I chaired the Working Group we formed to halt the winding up of the Company and revive Beyond Words. We formed a new Board and organisational structure and I was made Board Chair. My thanks to past Chair Ray Cummings for his years of service and the smooth handover. As Chair, my focus has been on leading planning for our future, and establishment of a sustainable organisation which will bring more and better biographies to people in aged care facilities.

The Board in consultation with many of our biographers developed a Strategic Plan. This plan positions us as a collaborative team of volunteers with a strong agreed commitment to work to improve the lives of people living in aged care facilities for the long haul.

RICHARD HILL



# SECRETARY AND PUBLIC OFFICER REPORT



I have taken on these roles early this year and can confirm that governance matters have been sorted out following the change of Board members and the allocation of responsibilities.

My role is a fairly straightforward one. It comprises making sure that the necessary compliance and governance matters are completed when required, such as ensuring appropriate insurance coverage is maintained and keeping the company's trademark protected.

As a program registered with the Australian Charities and Not-for-profits Commission, the public officer role acts as the Primary Contact for the company, and accordingly is responsible for providing an Annual Information Statement to the Commission.

Otherwise, the Board may delegate to the company secretary certain administrative tasks required under the Biography Program's Constitution.

BRIGID RYAN



# COORDINATOR REPORT



The Beyond Words Strategic Plan is being implemented and the organisation developing through the work of many biographers and new volunteers who have stepped forward generously with their time and talents. These are the people who are building a new organisation:

- Toby Hayes reports to the Board as Chair of the Fundraising Sub-committee.
- Both the Board and Fundraising Sub-committee have in recent months come to rely on the efficiency of Terry Litchfield in minute taking and other administrative assistance.
- Vera Considine has stepped in as Finance Officer, overcome hurdles with banks and system providers to produce our Financial Reports.
- The Editorial Team have established a great system to complete biographies with a swift and effective edit and layout which Nigel coordinates and describes below
- An I.T. Group of Caroline Trubridge, Margie Joyce and Neha Abat are working on our data management and on-line presence to make us more efficient, better known and maybe even to reduce the costs involved!
- Dan Kavanagh reports below on what he and his regional volunteer liaison team are doing in program operation and managing the interface with aged care facilities.
- Dan Kavanagh and I delivered our first revised training program for 16 new biographers and were assisted by Julie Butcher on almost all the selection interviews. Input came from Nigel McQuitty and Carol Fletcher, a lifestyle coordinator as well as some of our very knowledgeable trainees.
- I have been assisted in producing our monthly biographers' newsletter by Val Sterling's excellent editing and various contributors of articles.
- Of course, our most essential volunteers are biographers, including most of the above people and they have stuck with us, ready to do their work when they can get in the doors of the aged care facilities we endeavour to serve.

We are enormously gratefully to all our volunteers for their time, talents and collaborative approach. Together we are building a strong organisation with growing capacity to make a difference in the lives of people in aged care with more quality biographies. Expect a lot of biographies in 2022 as aged care facilities reopen their doors!

RICHARD HILL

# ACF LIAISON AND PROGRAM COORDINATOR REPORT



Once the decision to continue the Biography Program was taken at the end of 2020, I commenced advising Aged Care Facilities that we would be resuming assessments and commencements when volunteers were again able to visit.

Resumption of visits varied as ACFs made their own local decisions. At the same time, I was contacting our volunteers to check their willingness to continue and their availability to commence.

ACFs with previous experience of the program were enthusiastic and new partners also emerged as word spread that we were back in business.

It became apparent that more volunteers were needed, and I conducted a recruitment exercise in March/April. Strong interest was obtained through fliers, social media and tapping into the U3A network.

Given the interest emerging from ACFs across Melbourne and beyond, we were keen to expand our volunteer presence to meet the demand. Over four days, Julie Butcher, Richard Hill and I interviewed the applicants and selected a cohort of 16 new volunteers, who completed their training in May. Eight members of this cohort were able to commence with their first clients before this lockdown.

It is pleasing that we have managed to do some biography work despite repeated lockdowns.

Assessments	Commencements	Completions	Active ACFs
45	20	10	19

I'm pleased to advise we now have Biographers who are willing to take on the additional task of assessment in their local areas and this will greatly enhance our reach when access is again available.

DAN KAVANAGH

# FINANCIAL STATEMENTS

## Balance Sheet

### The Biography Program

587 Brunswick Street  
North Fitzroy Vic 3068

### Balance Sheet

As of June 2021

21/07/2021  
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<b>Assets</b>			
Current Assets			
Cash On Hand			
Cheque Account	\$1,422.44		
Savings Account	\$57.38		
Total Cash On Hand		\$1,479.82	
Trade Debtors		\$1,057.24	
Total Current Assets			\$2,537.06
Fixed Assets			
Start Up Capitalised Costs			
StartUp Costs	\$859.00		
Total Start Up Capitalised Costs		\$859.00	
Total Fixed Assets			\$859.00
Total Assets			\$3,396.06
<b>Liabilities</b>			
<b>Net Assets</b>			
			\$3,396.06
<b>Equity</b>			
Retained Earnings		\$12,495.22	
Current Year Earnings		-\$9,099.16	
Total Equity			\$3,396.06

## Profit and Loss Statement

### The Biography Program

587 Brunswick Street  
North Fitzroy Vic 3068

### Profit & Loss Statement

July 2020 through June 2021

21/07/2021  
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Income		
Donations		\$2,270.00
Bank Interest		\$0.19
Recorder Sales		\$500.00
Total Income		<u>\$2,770.19</u>
Expenses		
Administration		
Accounting & Audit Fees	\$1,298.00	
Accounting Software Subscrip'n	\$334.29	
Bank Charges	\$40.80	
Catering	\$34.90	
Commission	\$3.12	
Computer/IT Repairs	\$1,230.60	
Gifts	\$49.96	
Insurance	\$480.00	
Motor Vehicle	\$441.36	
Office Supplies	\$1,173.46	
Office Expense Allowance	\$1,300.00	
Postage	\$37.10	
Police Checks	\$256.00	
Printing	\$472.60	
Recorders	\$257.50	
Telephone	\$588.50	
Toner	\$494.88	
Venue Hire	\$467.00	
Employment Expenses		
Superannuation	\$252.40	
Wages & Salaries	\$2,656.88	
Total Expenses		<u>\$11,869.35</u>
Operating Profit		<u>-\$9,099.16</u>
Other Income		
Other Expenses		
Net Profit / (Loss)		<u>-\$9,099.16</u>

# TREASURER REPORT



The year was one for taking stock with focus on halting the winding-up and regrouping. This was reflected in the organisation's finances.

Overall there was a net loss of approximately \$9,000 leaving just over \$3,000 in equity. Fundraising success in financial year 2021-22 will be key to the organisation remaining operational and planning for future success. One promising reflection is that operating costs have been reduced with savings realised in several areas such as software and technical computer support.

Every little bit counts, and we appreciate the generous donations (tax deductible over \$2) that were made including some by our generous volunteers; it is appreciated.



## The Fundraising Sub-committee

Earlier this year, four of us started meeting regularly to brainstorm fundraising ideas. We've only had rejection to date but await applications currently under review and will continue following up leads and promoting our quality work and the impact it's having.

**“We are standing by to accept funding and donations and welcome ideas so we can carry on the legacy of sharing life stories.”**

TOBY HAYES

# EDITORIAL TEAM REPORT



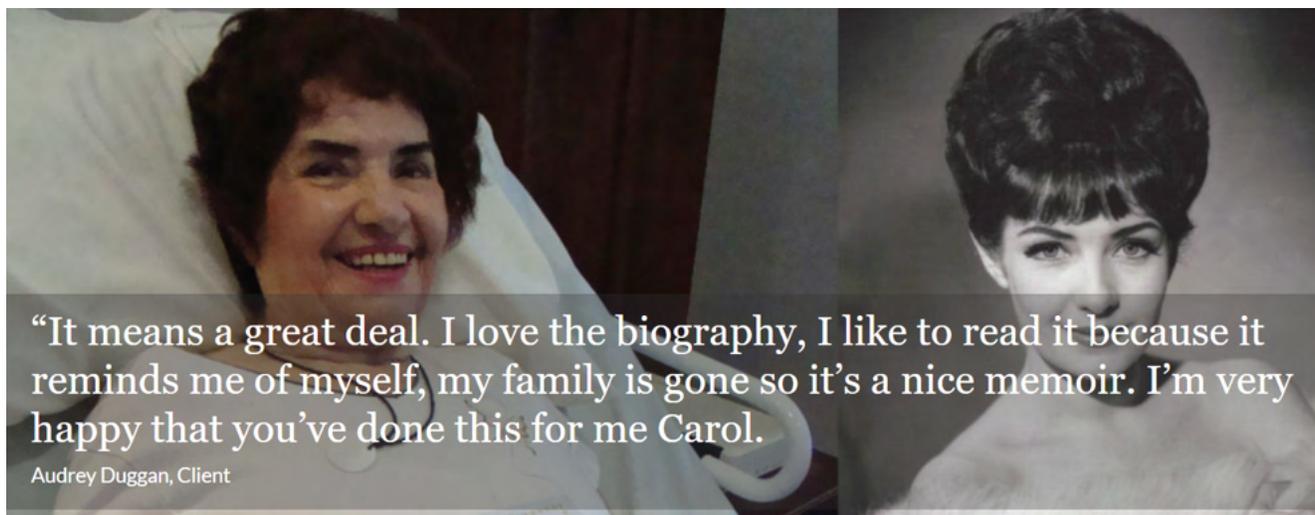
Our Beyond Words editorial team currently includes six volunteers. Val Sterling, Andrew Funston, Dianne Parslow, Brigid Ryan, Hannah Whiteside and me. Dianne also formats and prepares the biographies for printing.

We have developed a process that involves copyediting and proofreading by another editor before the biography is passed to another volunteer for formatting before printing. During the copy-editing stage, the copyeditor often contacts the biographer to resolve queries, clarify language questions and provide feedback to biographers.

We restarted with the first biography in April 2021, and currently edit roughly two biographies per month, but we expect that will increase later in the year. Although lockdowns have reduced the number of biographies, we continue to meet regularly via Zoom and discuss ways to improve the process and resolve issues.

We feel fortunate to be responsible to edit and format these stories of personal and family history that we know will continue to be valued by future generations.

NIGEL McQUITTY



# THANK YOU WENDY AND CAROL

We salute Wendy Shiels, Program Director and Coordinator of Volunteers, and Carol Walker, Operations Manager and Public Officer, for their dedication and years of service to Beyond Words. Their excellence in training biographers, publishing biographies and valuing life stories matters enormously to our community, and we commit to carrying their work forward with their trademark strength and empathy.

Wendy and Carol spoke at the “Power of Memory’ Conference’. They shared some valuable reflections after being introduced by Linda D’Sylva, Lifestyle Coordinator, who advised that one of the residents at Vasey RSL Care Bundoora keeps her book in her walker, often referring to it as a source of joy:

Wendy explained that there are a number of reasons that people want to get things down on paper: some want to unload memories, for example of their war experiences or document difficult childhoods; some want to put things in writing that they cannot easily tell family members; others want to do it for their families, as a legacy for their children and grandchildren.

“What I have learnt is there is no such thing as an *ordinary life*,” said Wendy.

One lady wanted to document her escape from the Nazis, her trek through the Alps, and capture by the Russians. She didn’t want to have to respond to questions about this time, so she requested that her biography only be given to her relatives after her death. But this is unusual – most people can’t wait to share them.

The biographers often hear things that have never been shared before – family secrets and gems of all types! New biographers must therefore undergo a rigorous training program.

Writing their biography is the decision of the individual – it’s their story to be told and no-one knows it better than they do. So, the biographer’s job is to use their skills to guide and help the individual tell them what it is they wish to record.

It takes 10-12 weeks to meet with the resident and talk about their life. The biographer then puts the content together, using photos, letters and other mementoes to illustrate it or check dates, and this takes around 6-8 weeks.

Once ready, there is an official presentation, again chosen by the individual: it might be a private afternoon tea with close family, or a large event with many friends – whatever they prefer.

“The process of creation itself makes a difference,” says Wendy. “This enables the resident to feel that their personal story has been told and they have been able to leave a legacy for their family.”

“They give you the pearls, you string them together, and you hand them back to them.”

THE BOARD AND BIOGRAPHERS OF BEYOND WORDS