



Annual Report 2024

Values in Action is an unfunded incorporated association in Brisbane, Queensland. We host SRV and SRV-related events as well as working to develop SRV application and the emergence of next generation leaders.

We work closely with other state-based SRV groups and the Australian SRV Association (ASRVA)

The objects of the Association are:

1. To promote greater awareness and understanding of Social Role Valorization Theory and related concepts.
2. To conduct relevant training events.
3. To provide support and assistance of a personal, advisory and information nature to Association members involved in human service change efforts.
4. To engage in cooperative activities with other organisations with similar aims and objectives.

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President's Report

VIAA'S CURRENT GOALS

Values in Action's current goals include:

1. Doing our core business well, which includes running theory events.
2. Strengthening existing, and building new connections with people and organisations.
3. Ensuring our offerings are suited to what people are looking for.

1. VIAA CORE WORK

Events

Towards a Better Life (TABL; 2-day Introduction to SRV Workshop)

Values in Action hosted three 'Towards a Better Life' workshops in the 2023-24 financial year

1. August 2023
2. November 2023
3. April 2024

2. RELATIONSHIPS

Leadership Development

A major focus for ViAA in the past year has been to contribute to the development of future SRV educators in Australia. We are pleased to support the efforts of the Australian SRV Association (ASRVA) to safeguard the theory and ensure there are skilled SRV educators to continue the teaching and learning of SRV in Australia.

There were at least two co-teachers at all ViAA events who taught alongside Jane Sherwin. As the year progressed, co-teachers stepped up into lead roles to practice collaborating with hosts, delivering more content and being more active in responding to questions. By April 2024, Jane was present in an observer-mentor role and did not teach any modules. This represented a significant step in the transition to handing over to new teachers.

Co-teaching at our events allows the educators to practice their teaching and to achieve the required competencies. We support their involvement through paying all travel expenses and offering stipends where educators are not sponsored by their employer. Rather than thinking of these as additional operational expenses for running events, we established a separate budget for leadership development and committed funds from our reserves for this purpose.

Co-teachers at Towards a Better Life events in 2023-24

- August 2023: Kylie Duncis, Danielle Mason

- November 2023: Sharon Lowe, Amie Storer
- April 2024: Lindie Brengman, Ricky Esterquest, Danielle Mason

Although the co-teachers are in a learning role, we regularly receive positive feedback about the teaching teams

- *I liked the good & knowledgeable instructors*
- *I liked the presenters and the stories and examples they shared*
- *The teachers did an amazing job*

Australian SRV Association (ASRVA)

As mentioned above, ViAA has a close relationship with ASRVA and seeks to support their national initiatives. The main focus this year has been the development of co-teachers. This is a mutually beneficial relationship and ASRVA routinely assists ViAA through sharing information about our events and importantly, contributing towards leadership development costs in the support of co-teachers.

We are grateful to the Australian SRV Association (ASRVA) for their national leadership in developing SRV communities of practice, developing future educators and PASSING Leaders, and stimulating interesting discussions through events and gatherings.

Increased Engagement with People with a Devalued Status and Family Members

Guest Speakers

One way to include people with a devalued status (or family members) is to invite people to speak at *Towards a Better Life* events. Guest speakers describe their vision for their lives (or the life of a loved one), and share photos and stories about the ‘good things’ they have in their life.

- August 2023 – Dale Speed
- November 2023 – Luke Cowan
- April 2024 – Rodney Mills

We consistently receive positive feedback about the impact that these personal stories have on workshop participants. Hearing personal stories helps to shift mindsets and helps people to believe that a good life is possible for all people.

Concession Tickets

To encourage participation at our events we offer concession tickets to people with a devalued status and family members. We continue to be interested in finding ways to encourage and support participation at our events by devalued groups and family members.

3. ACCESSIBILITY OF VIAA OFFERINGS

This goal is about making sure the events we run and resources we produce are as accessible to as many people as possible.

Social Media

At our planning day we decided to focus on social media as a means for sharing SRV-related information, an avenue to connect with people after events, and a way to encourage people to connect with one another in the SRV community. We also see this as a way to share information about our events but don't want that to be the main purpose. Although we have not launched a ViAA social media presence to date, we have made good progress. We are keen to ensure we are connecting with people in modern

Travel Bursaries

A new initiative for ViAA is to offer travel bursaries to people from outside South-East Queensland and for whom travel costs would be a barrier to attendance. We established a simple process and criteria for assisting us to make travel bursaries. We have not received any requests for assistance so will need to consider how to promote this option more effectively.

GOVERNANCE

A quick update on many of the invisible, behind the scenes workings of a management committee. Reviewing our risk management strategies led to:

- Updating our insurances.
- Establishing a Code of Conduct and a Conflict of Interest Register.
- Creating simple agreements between contractors and ViAA.
- Engaging co-teachers as volunteers of the Association to make sure they are covered by our insurances and completing a simple induction to ensure they understand their WHS obligations.

There were also several changes introduced by government agencies such as the ATO and the Office of Fair Trading which meant we spent time making sure we are compliant with the requirements of an incorporated association. We are grateful to organisations like Foundations Forum and Gold Coast Community Lifestyles for working collegially and sharing helpful information and resources to assist us with meeting our obligations.

ACKNOWLEDGEMENTS

Community Resource Unit continues to provide practical support to ViAA which is much appreciated. From borrowing meeting rooms, equipment, the use of their printer, and sharing information about our events with their large mailing list, every bit of assistance is gratefully received.

Staffing Options has also frequently allowed us the use of their meeting room for committee meetings as well as other practical assistance – thank you for this help.

We have appreciated the opportunities to work with the SRV educator group members this year. This year the educators have expanded their responsibilities in working with us in the lead-up to our events. Each educator is dedicated and puts a great deal of effort into preparing and delivering the training alongside Jane. Your collegial and collaborative approach is essential to our events being a success. Cheers to you all.

I also want to extend a big thank you to my committee colleagues – Mitch Casey, Leisa Cooke, Ricky Esterquest, Natalie Kurth, Jen Mouritz, Lisette Schulz, and Anita Speed. It has been a pleasure working with you all.

My final acknowledgement must be to Jane Sherwin. With the welcoming of newly accredited educators imminent, this point in time represents a significant shift to the relationship between ViAA and Jane. We have been fortunate to have had a Qld local Senior Trainer in Jane, and therefore, she has presented the bulk of training for ViAA for some time. Jane is warm, friendly, reflective, works in right relationship, has a focus on quality, and holds high expectations. She is generous, committed and dedicated, is a skilled mentor, is highly knowledgeable in SRV, and is a continual learner. Although we know that her involvement in the SRV community is not over, we will miss the closeness of our working relationship. We are grateful that the next generation of SRV educators has benefited from Jane's mentorship and trust that her skills and positive qualities will have rubbed off on them. Our best wishes to Jane for the next stage of her career.

Thank you to all Members for your support of Values in Action Association.

Danielle Mason

President

Treasurer Report

Dear Members,

I have the pleasure of presenting the financial statements for 2023-2024.

To meet our obligations under the legislation we have financial statements prepared each year by Jason O'Connor Chartered accountant, who is extremely responsive and doesn't charge hugely. Thankyou Jason.

We are also fortunate to have a very competent bookkeeper, Sally Halliday who voluntarily does this. Sally assists with preparing the BAS statement for lodgment with the ATO quarterly. Thankyou Sally!

As Treasurer, I prepare several reports for each committee meeting throughout the year, providing the committee with information about our finances; money in and money out for events, memberships, BAS returns and other sundry items. We apply two factor transfer processes for all payments made and where there may be a conflict of interest among the two people to sign authorities we seek third party approval. This preparation ensures that we meet our obligations to you as our members at annual review. We are confident that our financial management and processes are transparent and in line with operating as an association incorporated.

This financial year, you will see on the income statement for the financial year 2023-2024, a total income of \$ 26,424.10 and total expenditure of \$ 23,129.24, leaving a net surplus of \$3,294.86.

In breaking down the income and expenditure, you can clearly see that majority of all income has been generated from events, with a small amount of income coming from membership and interest payments namely from the term deposit held at Bank of Queensland with a small amount of interest generated via the everyday account held at Suncorp.

This financial year we have successfully run three face to face events; Towards a Better Life. Overall, these events have generated a net income of approximately \$5000.00 with the breakdown for each event as follows:

August 2023	Towards a Better Life: Mount Gravatt \$2074.00
November 2023	Towards a Better Life Everton Park \$1280.00
April 2024	Towards a Better Life Bracken Ridge \$1730.00

In calculating these figures, I have costed all expenses from Educator costs, printing, venue hire, catering and variable other on costs against the income from ticket sales of the event.

It is pertinent to note that this year we decided as a committee to invest in leadership development to ensure the future of SRV is supported. The approximate expenditure for

leadership development over the 2023/24 final year was \$3000. This included costs such as stipends, air fares, accommodation and some other sundry items.

Other notable considerations when reviewing the financial year's statement and overall profit and loss is that we sold a total of 9 concession tickets across the 3 events, totaling a subsidy of \$2155.00 across all 3 events.

Considering the event surplus income and leadership development expenditure we can approximate that we ended the financial year with an event net surplus \$2000.00

Overall, the year of events has been very positive.

Financial changes - things to note:

As noted at the last AGM and subsequent AGMs we have managed ASRVA's monies since 2013. Since ASRVA has become a Company Limited by Guarantee we no longer hold ASRVA's money. All funds held for ASRVA both in trust and working accounts have now been transferred. On transferring the funds to ASRVA the account that held their working funds has received interest (\$2.75) and is still operational as a business account under Vales in Action. This account will remain open as we explore if the current working account Values In action operates is the right account given our incorporation status.

In review of the balance sheet, you will see that Values in Action's net cash position is \$51,058.03. This considers the money that we hold both in trust with BOQ and in a separate working account with Suncorp, alongside the small amount of interest in the old ASRVA business account.

Values in Action has recently lodged a self-review as a new requirement under the ATO to self-assess income tax exemption. From the 2023-24 income year, non-charitable not-for-profits (NFP) with an active ABN need to lodge an annual return. This process was straight forward and has no impact on the continued status and operations of Values in Action.

I now propose that the Treasurer report and financial statements be accepted.

Thank you,

Natalie Kurth

Treasurer