

Annual Report

2024



Table of Contents

Overview 3

- Our Purpose 3
- Our Mission 3
- Our Vision 3
- Our History 3
- About us 3
- Our Culture..... 3
- Key Achievements for Financial Year 2024 4

Governance and Management 5

- Governance Structure 5
- Board of Directors..... 5
- Meetings and Decision Making 6

Operational Highlights 7

- Our Services 7
- Geographical Reach 8

Finance Performance 9

- Finance Reports..... 9
- Key Financial Metrics..... 9
- Audited Financial Statements..... 10
- Financial Sustainability 10

Strategic Insights and Future Direction 11

Acknowledgements 13

How to Support and Contact us..... 15



Overview

Our Purpose

At Care Assess, we aim to optimise the health and well-being of vulnerable populations across Tasmania. This mission, deeply embedded in our constitution, guides all our actions and initiatives as we strive to improve the lives of individuals and communities through independent, unbiased assessment services.

Our Mission

We are committed to optimising health, wellbeing, and safety outcomes for vulnerable individuals through quality assessment and coordination of services.

Our Vision

We want to be a market leader of independent, effective, and sustainable assessment services across Tasmania.

Our History

Since its inception in the mid-1990s as "Careworks," Care Assess has remained a pioneer in independent assessment services. The organisation's transformation in 1999 into Care Assessment Consultants marked the beginning of a distinct mission to provide unbiased needs and funding assessments across the state.

The pivotal year of 2011 saw the launch of Care Tasmania Pty Ltd, which was later rebranded to Care Assess in 2019, emphasising independence by separating assessment from service delivery. In 2022, we transitioned into a not-for-profit charity and Public Benevolent Institution (PBI), further aligning our work with community-focused values.

About Us

Care Assess stands as Tasmania's premier independent assessment agency. We specialise in critical services that ensure fair and accurate assessments, empowering individuals to access the support they

need. We provide a range of programs including:

- **Regional Assessment Service (RAS):** Conducting home support assessments for My Aged Care clients.
- **Veterans' Home Care (VHC):** Tailored assessments for veterans' care needs.
- **Australian National Aged Care Classification (AN-ACC):** Supporting residential aged care funding allocations.
- **Health Assessments:** Coordinated through partnerships with general practitioners.

In the 2024 financial year, we furthered our commitment to excellence by participating in the Integrated Assessment Tool (IAT) live trial and implementing this innovative system on July 1, 2024. These initiatives reflect our dedication to continuous improvement and innovation in the assessment sector.

Our Culture

Care Assess is driven by a culture of collaboration, professionalism, and client-centred care. We prioritise the following values:

- **Empathy and Respect:** Understanding and addressing the diverse needs of our clients.
- **Integrity:** Maintaining the highest standards of transparency and accountability.
- **Excellence:** Striving for superior outcomes in every assessment we conduct.

Our team of 42 professionals embodies these values, ensuring that our services remain rooted in compassion and quality.

Key Achievements for the 2024 Financial Year

- **Staff Development:**
 - Total team strength: 42 employees.
 - Onboarded 5 new staff members.
 - Enhanced training initiatives to support staff readiness for sectoral reforms.

 - **Service Metrics:**
 - **RAS Assessments:** 4,908 completed.
 - **VHC Assessments:** 1,063 completed.
 - **AN-ACC Assessments:** 2,816 completed.

 - **Technology and Innovation:**
 - Implemented the Integrated Assessment Tool (IAT) for streamlined processes and improved assessment accuracy.

 - **Community Impact:**
 - Expanded service reach across Tasmania, maintaining a strong presence in urban, rural, and remote areas.
-

Governance and Management

Governance Structure

Care Assess operates under a robust governance framework that reflects our commitment to transparency, accountability, and ethical operations. As a registered charity under the Australian Charities and Not-for-profits Commission (ACNC) and a Public Benevolent Institution (PBI), our governance structure ensures the effective oversight of our mission and strategic objectives.

Our board of directors is composed of experienced professionals with diverse expertise, each contributing to the strategic direction and operational success of Care Assess. The governance structure includes:

- **Strategic Oversight:**
 - Developing and refining long-term goals to align with our mission.
 - Ensuring compliance with government and sectoral reforms, such as the transition to the Single Assessment System (SAS).
- **Risk Management:**
 - Proactively identifying and addressing organisational risks to safeguard services.
- **Compliance and Accountability:**
 - Adhering to the ACNC Act and the Corporations Act.
 - Ensuring annual audits and transparent reporting of financial and operational performance.

Board of Directors

Our directors bring a wealth of knowledge from various sectors, ensuring a balanced approach to governance and decision-making:

- **Joseph Towns (Chairperson, Managing Director, Secretary):** With over a decade and a half of leadership experience, Joe has been pivotal in shaping Care Assess' strategic direction since 2012.
- **Julie Doering (Director):** A Registered Nurse with over 30 years in aged care, Julie focuses on quality assurance and best assessment practices.
- **David Haynes (Director, CEO):** An expert in service analysis and information technology, David supports strategic decision making, business modelling and operational management.
- **Additional Directors:** Care Assess is seeking other professionals who bring management and governance expertise in healthcare, governance, and operational efficiency to join our board.

Compliance and Reporting

In the 2024 financial year, Care Assess continued its rigorous approach to compliance and reporting, ensuring alignment with:

- **ACNC Standards:**
 - Maintaining high standards of governance and financial accountability.
 - Providing transparent reporting on operations and financials.
- **Industry Regulations:**
 - Adhering to standards set by the Department of Health for aged care assessments.
 - Meeting all contractual obligations under government-funded

programs, including RAS, AN-ACC, and VHC.

Meetings and Decision-Making

The board convened regularly during the 2024 financial year, holding six formal meetings and additional strategy sessions to ensure alignment with organisational goals. Key decisions included:

- Adoption and implementation of the Integrated Assessment Tool (IAT).
- Strategic planning for Single Assessment Service reforms is set to begin in July 2024.
- Approval of workforce development initiatives to strengthen capacity and readiness.

Key Governance Achievements in the 2024 Financial Year

- **Strategic Planning:**

- Conducted a comprehensive review of organisational goals to align with emerging sectoral changes.
- Established frameworks to transition seamlessly to the SAS model.

- **Technology Integration:**

- Oversaw the successful implementation of the IAT, enhancing assessment processes and client outcomes.

- **Stakeholder Engagement:**

- Strengthened partnerships with government agencies, community organisations, and industry stakeholders.

Operational Highlights

Our Services

Care Assess is dedicated to delivering independent, client-focused assessments across Tasmania, ensuring individuals receive the support they need to maintain their health and independence. In the 2024 financial year, we focused on enhancing service delivery through innovation, technology integration, and client engagement. Our core services include:

- **Regional Assessment Service (RAS):**
 - **Assessments Conducted:** 4,908
 - **Service Overview:** RAS is a cornerstone of Care Assess' operations, enabling elderly Tasmanians to access appropriate home support services through My Aged Care. These holistic assessments ensure clients receive tailored support to maintain their independence and quality of life.
 - **Impact:** By conducting nearly 5,000 assessments, our team has empowered thousands of clients to access services that meet their unique needs. These assessments have strengthened community-based care across Tasmania.
- **Veterans' Home Care (VHC):**
 - **Assessments Conducted:** 1,063
 - **Service Overview:** The VHC program supports veterans by assessing their eligibility for home care services. This program honours those who serve the nation by ensuring they receive the care and support they deserve.
 - **Impact:** Our assessments have facilitated vital services for veterans, including personal care, domestic assistance, and respite services, fostering independence and dignity.
- **Australian National Aged Care Classification (AN-ACC):**
 - **Assessments Conducted:** 2,816
 - **Service Overview:** AN-ACC assessments are critical for determining funding requirements for residential aged care facilities. Our team ensures these assessments are accurate and fair, aligning resources with resident needs.
 - **Impact:** Through AN-ACC, we have supported aged care providers in meeting the diverse needs of their residents, ensuring equitable resource allocation.
- **Health Assessments:**
 - **Service Overview:** Delivered in partnership with general practices, these assessments help individuals manage chronic conditions and plan for ongoing care.
 - **Impact:** Although data for the number of assessments is unavailable, this program has provided valuable insights into clients' health needs, supporting their overall well-being.

Geographical Reach

Care Assess has a strong presence across Tasmania, delivering services in urban, rural, and remote regions. Our statewide coverage ensures that even the most isolated communities can access critical assessment services.

Innovation and Technology Integration

- **Integrated Assessment Tool (IAT):**
 - Care Assess participated in the Department of Health’s live trial for the IAT from April to June 2023, demonstrating our adaptability and commitment to innovation.
 - On July 1, 2024, we implemented the IAT, streamlining processes and enhancing the accuracy of assessments.
- **Impact:**
 - The IAT has improved client experience by simplifying the assessment process and ensuring comprehensive evaluations.

Client-Centric Outcomes

- **Client Feedback:**
 - Testimonials highlight the professionalism and empathy of our assessors, reinforcing our reputation for client-centred care.
- **Case Studies:**
 - Example: A RAS client in rural Tasmania reported a dramatic improvement in their ability to remain at home, thanks to personalised support facilitated through our assessments.

Financial Performance

Finance Report

I am pleased to present the financial performance for the financial year ending June 30, 2024. This year marks another milestone in our journey as a not-for-profit charity, demonstrating our financial stability and commitment to delivering independent and high-quality assessment services across Tasmania.

Financial Overview

- Total Income:
 - Our total income for the 2024 financial year was \$3,966,264, sourced primarily from government contracts for Regional Assessment Service (RAS), Veterans' Home Care (VHC), and Australian National Aged Care Classification (AN-ACC) assessments.
- Total Expenses:
 - Expenses for the year totalled \$3,797,547 with 69% allocated to wages and salaries, demonstrating our investment in skilled professionals who are the backbone of our services.
- Net Surplus:
 - Care Assess achieved a net surplus of \$168,594 for 2024 financial year, reflecting prudent financial management and enabling future service enhancements.
- Liquidity and Solvency:
 - **Liquidity:** Our liquid assets ratio stood at 1.74, indicating a strong position to meet immediate financial obligations.
 - **Equity:** Total equity as of June 30, 2024, was \$386,720 further enhancing our financial stability.

Key Financial Metrics

Metric	Value
Total Income	\$ 3,966,264
Total Expenses	\$ 3,797,670
Net Surplus	\$ 168,594
Operating Surplus Margin	4%
Liquidity Ratio	1.74
Total Equity	\$ 386,720

Audited Financial Statements

Our financial statements for 2024 financial year have been audited in compliance with Australian Accounting Standards and the Australian Charities and Not-for-profits Commission (ACNC) Act. The audit result was unqualified with no adverse findings. The audit reaffirms our commitment to financial transparency and governance.

- **Accessibility:** Stakeholders can access our audited financial statements on the ACNC website.
- **Compliance:** We adhered to all reporting requirements, ensuring accountability to our funding partners and the broader community.

Financial Sustainability

Care Assess remains dedicated to financial sustainability, ensuring resources are allocated effectively to maximise community impact. Strategic priorities for the coming year include:

- Increasing operational efficiencies to reduce costs.
- Exploring additional funding opportunities to diversify income streams.
- Investing in workforce development and technological advancements to enhance service delivery.

Marian Kemp, Chief Finance Officer

Strategic Insights and Future Directions

Sectoral Reforms and Strategic Adaptation

The Australian aged care sector is undergoing significant reforms, marking the 2024 financial year as a pivotal year for Care Assess. At the core of these changes is the **Single Assessment System (SAS)**, set to launch in 2024. This system aims to unify and simplify aged care assessments across the nation. This transformative framework aligns seamlessly with Care Assess' mission to deliver independent, client-centred assessments.

Preparation for the Single Assessment System

Care Assess has proactively positioned itself to thrive within the SAS framework through strategic initiatives, including:

- **Integrated Assessment Tool (IAT) Live Trial:**
 - From April to June 2023, Care Assess participated in the Department of Health's IAT trial, refining a key component of the SAS framework. This initiative highlighted our adaptability and commitment to innovation.
- **IAT Implementation:**
 - On July 1, 2024, Care Assess successfully implemented the IAT, enhancing the accuracy, efficiency, and client-centric focus of our assessments.
- **Staff Training:**
 - Extensive training programs prepared our team to navigate the transition to the SAS, ensuring readiness for this pivotal sectoral reform.

Strategic Priorities for the 2025 financial year and beyond

Building on the groundwork laid during the 2024 financial year, Care Assess has developed a comprehensive strategy to address the evolving needs of the aged care sector. These priorities include:

- **Seamless Transition to SAS:**
 - Fully integrate operations with the SAS framework to streamline assessments and enhance client outcomes.
 - Use insights from the IAT implementation to refine processes, ensuring compliance and readiness for sector-wide changes.
- **Service Diversification:**
 - Expand service offerings to include comprehensive home care assessments.
 - Address emerging needs within Tasmania's aging population with tailored, innovative solutions.
- **Technological Innovation:**
 - Explore advanced technologies to improve operational efficiency and data management.
 - Leverage analytics to identify trends, enhance service delivery, and inform policy advocacy.
- **Workforce Development:**
 - Strengthen workforce capacity through targeted recruitment and ongoing professional development.

- Equip staff with the skills necessary to adapt to new challenges and opportunities within the SAS framework.
- **Geographic Reach:**
 - Focus on delivering equitable access to assessments for rural and remote communities, ensuring that all Tasmanians benefit from quality care.

Embracing Opportunities and Innovation

The SAS reform presents Care Assess with unique opportunities to lead in delivering integrated, client-centred assessments that set benchmarks for quality and efficiency. Key opportunities include:

- **Sectoral Leadership:**
 - Enhance our reputation as Tasmania’s premier independent assessment provider through thought leadership and innovation.
- **Comprehensive Assessments Expansion:**
 - Leverage the planned increase in the Single Assessment System program under the Support at Home reform to expand services and impact.
 - Address growing community needs by developing Tasmania-focused assessment service models for comprehensive home care.

Commitment to Community Impact

Care Assess remains steadfast in its commitment to fostering independence, health, and dignity for Tasmania’s vulnerable populations. Our approach is built on:

- **Client-Centred Care:** Assessments tailored to each individual’s unique needs and aspirations.
- **Equity and Inclusion:** Bridging gaps in access to care for rural, remote, and disadvantaged populations.
- **Excellence and Innovation:** Continuously improving processes and adopting cutting-edge tools to deliver assessment services.

Measuring Success

To track our progress and ensure accountability, Care Assess will monitor:

- Client satisfaction and health outcomes.
- Service delivery efficiency and effectiveness.
- Workforce capacity and retention.
- Financial sustainability and growth metrics.

A Collaborative Vision

Achieving these strategic goals will require collaboration with government agencies, community partners, and stakeholders. Together, we can build a more inclusive and effective in-home aged care assessment and service system, empowering Tasmanians to live healthier, more independent lives.

Acknowledgments

Care Assess' achievements during the 2024 financial year would not have been possible without the unwavering support and contributions of our staff, directors, clients, partners, and stakeholders. This section recognises their vital roles in advancing our mission to provide independent, high-quality assessment services across Tasmania.

Acknowledgment of Country

Care Assess acknowledges the Tasmanian Aboriginal community as the traditional custodians of lutruwita/Tasmania. We pay our respects to Elders past, present, and emerging and recognise their enduring connection to the land, waters, and culture on which we live, learn, and work. We are committed to fostering partnerships and understanding with Indigenous communities as we work to improve health and well-being for all Tasmanians.

Our Staff

At the heart of Care Assess is our dedicated and skilled team of professionals. Their compassion, expertise, and commitment to excellence drive our success. Key highlights from the 2024 financial year include:

- **Workforce Growth:**
 - Total team strength reached 42 as of June 30, 2024, with 5 new staff members joining our ranks.
- **Professional Development:**
 - Staff underwent extensive training programs to prepare for implementing the Integrated Assessment Tool (IAT) and the transition to the Single Assessment System (SAS).
- **Staff Contributions:**
 - From assessors conducting thousands of evaluations to administrative staff ensuring smooth operations, each team member's role has been pivotal in delivering high-quality services.

We extend our deepest gratitude to our staff for their resilience and dedication to navigating the 2024 financial year's challenges and opportunities.

Board of Directors

Our board has provided steadfast leadership and strategic oversight throughout the year. The diverse expertise of our directors has been instrumental in guiding Care Assess through sectoral reforms and operational enhancements. Special thanks to:

- **Joseph Towns** (Chairperson, Managing Director, Secretary): For his visionary leadership and commitment to Care Assess' mission.
- **Julie Doering:** For her invaluable contributions to quality assurance and best practices.
- **David Haynes:** For his expertise in technology and policy, which has supported innovation within our organisation.

Our Clients

To our clients, you are the core of our mission. Your trust, feedback, and engagement inspire us to continually improve our services. Your stories of resilience and progress drive our commitment to providing independent, client-centred assessments.

Partners and Stakeholders

Care Assess thrives on collaboration. We are deeply grateful for the support of our partners and stakeholders, including:

- **Government Agencies:**
 - The Department of Health for funding and guidance on RAS, VHC, and AN-ACC programs.
- **Community Organisations:**
 - Local partners who help us deliver services in rural and remote areas.
- **Healthcare Providers:**
 - General practitioners and aged care facilities for their collaboration in delivering holistic client care.

Community and Funding Support

The financial support we receive ensures the sustainability of our operations and the continuous improvement of our services. Highlights include:

- RAS funding of \$2,226,767.
- VHC funding of \$226,910.
- AN-ACC funding of \$1,466,529.
- Health Assessments funding of \$13,839.

This financial stability enables us to fulfil our mission of enhancing the health and well-being of Tasmania's most vulnerable populations.

Special Recognition

We extend special recognition to the individuals and teams who contributed to successfully implementing the Integrated Assessment Tool (IAT). This milestone represents a significant leap forward in delivering efficient and accurate assessments.

Looking Forward with Gratitude

As we look back on the past year, we are immensely grateful for everyone who has supported us along the way. Together, we have made a meaningful impact on the lives of countless Tasmanians, and we look forward to continuing this journey in the years ahead.

As we move forward, Care Assess is confident in its ability to embrace the challenges and opportunities of the evolving aged care landscape. Guided by our mission and bolstered by our dedicated team, we are prepared to make a meaningful and lasting impact on the lives of those we serve.

How to Support and Connect with Us

Contact Us

Care Assess is committed to fostering strong relationships with our clients, partners, and the Tasmanian community. We welcome your feedback, inquiries, and engagement as we deliver independent, high-quality assessment services.

Contact Information:

- **Phone:** 1300 393 812
- **Email:** info@careassess.com.au
- **Website:** www.careassess.com.au

Office Locations:

- **South (Head Office):** Level 3, 6 Bayfield Street, Rosny Park, TAS 7018
- **North Office:** Ground Floor, 403 West Tamar Highway, Riverside, TAS 7250
- **Northwest Office:** Shop 3 & 4, 151 William Street, Devonport, TAS 7310

We encourage you to contact us for feedback, service inquiries, or to explore ways you can contribute to our mission.

Stay Informed

To stay up to date with Care Assess and our impact across Tasmania, visit our website for the latest news and updates.

Support Our Mission

Your support plays a critical role in helping us provide independent, unbiased assessments that enhance the lives of Tasmanians. Here are ways you can make a difference:

- **Donate:**
 - Financial contributions help us expand our services and reach more clients in need. All donations over \$2 are tax-deductible. Contact us to ask how you can contribute securely.
- **Advocate:**
 - Share our mission with others. By raising awareness about the value of independent assessments, you help us connect more people to the support they need.
- **Partner With Us:**
 - Whether you're a business, organisation, or community group, partnerships with Care Assess strengthen our ability to deliver exceptional services. Contact us to discuss sponsorships or collaborative opportunities.

Your Impact

Every contribution, whether financial, professional, or personal, makes a meaningful difference. With your help, we can continue to empower individuals to live healthier, more independent lives.

Acknowledgment of Support

We extend our heartfelt thanks to everyone who has contributed to Care Assess throughout the 2024 financial year. Your trust and generosity drive our mission and enable us to support vulnerable populations across Tasmania.

Looking Ahead

As we enter the 2025 financial year, we invite you to join us in shaping a brighter future for our community. Together, we can build a system of care that truly reflects dignity, equity, and compassion.